

Memorandum

To: School Committee

From: Members of the Equity Committee and the Equity Working Group

Date: January 14, 2019

Subject: Update on Equity Committee Activities

In June 2018, the School Committee approved changes to the Equity Guidelines that will take effect on July 1, 2019. During the fall of 2018, both elementary and secondary school principals received training on the updated Guidelines. Educational sessions for PTO leaders were held in spring 2018 and additional sessions will take place on 4 dates in January 2019. Additionally, members of the Equity Committee have offered to attend individual schools' PTO meetings to answer questions, and listen to communities' concerns, about the new Guidelines. To date, 7 schools have requested those meetings.

One of the Equity Committee's responsibilities is to review the annual financial reports submitted by individual PTOs and compiled by the PTO Council. The Equity Committee has reviewed that PTO financial reporting for the 2017-2018 school year and has not identified any concerns about potential violations of the current Equity Guidelines.

Summary of 2017-18 (FY 18) Financial Reporting

For FY 18, the per pupil allowed equity spending was \$109. Overall, each PTO's allowed equity spending is calculated as the per pupil equity rate multiplied by the greater of their projected enrollment or actual enrollment as of 10/1/17. Only two schools spent over 90% of their allowed equity spending (at 93% and 99%). Four schools spent less than 65% of their allowed equity spending. Six schools spent between 70-79% of their allowed equity spending, and 3 schools spent between 80-89% of their allowed equity spending. In the equity spending categories, by far the largest spending category was Creative Arts and Sciences. The second largest equity spending category was Teacher Classroom Support. Together, these two categories constituted 75% of all equity spending. Next year, the equity spending cap will be reduced to \$80 per student. This number was chosen because it was the approximate 3-year average of equity spending across the PTOs. Had the \$80 limit been in effect this year, six schools would have exceeded that cap by a meaningful amount, but 9 schools would have been within the cap.

Under the FY 18 Equity Guidelines, there was no cap on PTOs technology spending other than that it had to fill a need identified by the District's Technology Access Standard. Cumulatively, the elementary school PTOs spent \$104,180 on technology in FY 18. There was a wide disparity among the schools' technology spending, with a high of \$23,981. Four schools spent no money

on technology. The average technology spending across all of the schools was \$6,945. Of the schools that spent money on technology, the per pupil spending varied widely with a high of \$64.53 per pupil and a low of \$6.13 per pupil. Each school's technology spending can vary widely from year to year. For example, some schools may save money for several years to make a larger purchase, like a cart of laptops, and then spend nothing on technology for the next year or two.

Overall, there was a wide disparity in PTOs total per pupil spending (all spending including equity and non-equity categories). Two schools spent less than \$100 per pupil (\$86 and \$95). Three schools spent over \$200 per pupil (\$284, \$253 and \$212). The remaining 10 schools spent between \$100 and \$200 per pupil with the overall average spending at \$159 per pupil.

Equity Working Group to Consider Pooled PTO Funds

One of the changes to the Equity Guidelines that was approved in June 2018 was the creation of a working group to consider the feasibility of pooling PTO funds to achieve a more equitable distribution of resources among the schools. The 7-member Working Group was formed in November 2018 and consists of 2 elementary school administrators, 1 School Committee member and 4 parents/PTO members, who were chosen by the PTO Council representatives to the Equity Committee after soliciting applications from interested parents at all schools.

The Working Group has been meeting regularly since early December and is finalizing plans to solicit community input concerning the feasibility of pooling some PTO funds. The Working Group has an email address: EquityWorkingGroup@newton.k12.ma.us, which any community member can use to share thoughts with the entire Working Group. We are planning to host several focus groups of elementary school parents/guardians to solicit feedback from both PTO leaders and involved parents/guardians who are not necessarily PTO leaders. We are also planning to send questionnaires to both PTO boards and PTO Treasurers to collect additional information. Finally, we are planning to send a survey more broadly to all parents/guardians so that we can collect as much community input as possible. Given these communication plans, and the time that we will need both to conduct this outreach and to collect and analyze the responses, we believe that it is unlikely that we will be able to meet the originally-scheduled charge to make a recommendation to the School Committee by April 2019. We would expect, instead, to provide a report to the School Committee in April 2019 about the outreach we have conducted and to summarize the information we have collected through that outreach.

Following that presentation, and depending on whether it appears that some centralized funding will be recommended by the Working Group, the Working Group would plan to focus more on the logistics of implementing a pooling plan, with the goal of making a recommendation to the School Committee with a concrete proposal about how pooling resources for centralized funding may work by December 2019.

Attachment: FY 18 PTO spending data

FY18 Elementary PTO Actuals

PTO ACTUALS FOR 2017 to 2018

Line #		Angier	Bowen	Burr	Cabot	Country-side	Franklin	Horace Mann	Lincoln Eliot	Mason Rice	Mem. Spauld	Peirce	Under wood	Ward	Williams	Zervas	TOTAL
1	Rank	2	5	10	9	6	4	8	11	1	3	15	14	12	13	7	
2	# pupils projected [Source - see note below]	444	409	395	394	432	455	399	347	516	472	285	316	311	299	371	5,845
3	# pupils on 10.1.17	467	421	386	391	410	434	404	374	512	453	276	284	309	296	407	5,824
4	PTO Total Budgeted Operating Spending	\$ 99,083	\$ 57,133	\$ 68,560	\$ 53,734	\$ 51,465	\$ 41,137	\$ 49,818	\$ 32,003	\$ 88,720	\$ 68,833	\$ 52,306	\$ 35,049	\$ 78,097	\$ 38,829	\$ 115,635	\$ 930,402
5	PTO Budgeted Per Pupil Spending	\$212	\$136	\$178	\$137	\$126	\$95	\$123	\$86	\$173	\$152	\$190	\$123	\$253	\$131	\$284	\$159
6	\$ 197.69 FY 18 Per Pupil Equity Rate																
7	Allowed Equity Spending	\$ 50,777	\$ 45,775	\$ 42,948	\$ 42,839	\$ 46,971	\$ 49,472	\$ 43,927	\$ 40,665	\$ 56,104	\$ 51,320	\$ 30,988	\$ 34,359	\$ 33,815	\$ 32,510	\$ 44,253	\$ 646,723
8	Actual Equity Spending	\$ 37,392	\$ 27,345	\$ 33,548	\$ 31,597	\$ 33,927	\$ 30,607	\$ 31,028	\$ 20,690	\$ 52,365	\$ 32,685	\$ 25,150	\$ 24,642	\$ 27,060	\$ 28,319	\$ 43,814	\$ 480,170
9	% Actual vs. Allowed	73.6%	59.7%	78.1%	73.8%	72.2%	61.9%	70.6%	50.9%	93.3%	63.7%	81.2%	71.7%	80.0%	87.1%	99.0%	74.2%
	Actual per pupil	\$80	\$65	\$85	\$80	\$79	\$67	\$77	\$55	\$101	\$69	\$88	\$78	\$87	\$95	\$108	
	Allowed if \$80 per pupil cap	\$37,360	\$33,680	\$31,600	\$31,520	\$34,560	\$36,400	\$32,320	\$29,920	\$41,280	\$37,760	\$22,800	\$25,280	\$24,880	\$23,920	\$32,560	
	Spending over \$80 per pupil	\$32	-\$6,335	\$1,948	\$77	-\$633	-\$5,793	-\$1,292	-\$9,230	\$11,085	-\$5,075	\$2,350	-\$638	\$2,180	\$4,399	\$11,254	
Equity Line Items:																	
12	Creative Arts & Sciences	21,212	13,701	18,206	15,539	20,053	15,154	20,828	13,629	16,601	16,679	13,914	13,118	16,380	\$13,290	14,166	242,470
13	Curriculum Support			5,966	2,462	617	3,461			1,067					3,724	5,000	22,297
14	Field Trips				2,470		3,000		1,600	5,768	800				3,800		17,438
15	Library	1,529	2,997	1,000	1,660	1,009	992		885	1,978	130	4,181	998	2,058	1,695	3,794	24,907
16	Principal Discretionary Funds	2,668	1,500	3,000	816	7,004	3,000	3,000		4,204	4,369	1,500	3,000	2,686	2,667	11,068	50,482
17	Staff development -ind or small grp	1,574	606							1,800	4,808			475		562	9,825
18	Teacher Classroom support	10,409	7,550	5,375	8,650	5,244	5,000	7,200	4,576	10,864	5,900	5,555	7,526	5,461	3,143	9,224	101,678
19	Other Equity Item (specify)		991							9,640							10,631
20	Gift to School outside of PTO funds									443							443
Non-Equity Line Items:																	
21	5th Grade Activities	1,020	7,953	1,839	1,200	1,000	1,500	350	500	4,282	7,000		216		500	6,917	34,277
22	Adult Speakers Programs				337					582							918
23	Building & Grounds		56				57			572	5,800		59	2,758	42	8,818	18,162
24	CAPP	2,500	2,250	1,250	2,500		2,250	2,250		2,750	2,750	1,750	1,750	1,750	2,000	2,250	28,000
25	Committees	919			529							238	756		200	8,786	11,427
26	Community Events	3,314	550	2,441	1,930	1,625	597	2,559	280	3,621	2,577	776		3,958	986	13,750	38,964
27	Copying Costs/ Communications			891	277	66	141		592	105	195	615		514	62	1,640	5,097
28	Directory/Handbook	1,045	818	298	601	1,377	672	398	900	1,312	398	298	188	872	268	1,609	11,054
29	Hospitality	107		751	316		416			7,056	1,658		201			589	11,094
30	Insurance	375	255	395	255	446	255	180		355	400	520	255	255	414	650	5,010
31	Newsletter/website	320	128		420			2,138		1,037		353	332	526			5,254
32	Outreach and donations (inc Metco)	1,161			3,100		771	250		968		2,000					12,977
33	Playground Maintenance	23,472	64														23,536
34	PTO Administration			957	687	1,488	543			1,275	100	721	129	235	51	1,445	9,932
35	PTO Council & School Council	100	100	100	100	600	100	100	100	600	100	100	100	100	100	100	2,500
36	PTO Miscellaneous	70	122		2,440	737	660		332	1,627			287		354		6,629
37	Special Education									600					203	1,110	1,913
38	Teacher Appreciation	2,964	26	1,710	759	2,478	2,167	440	464	349	351	994	315	3,423		12,126	28,567
39	Understanding Our Differences	400	400	400	400	400	400	400	400	400	400	400	400	400	400	400	6,000
40	Use of Building	1,631								456	819				4,187		9,427
41	Other School Support- listed in comments	10,051	3,044		\$ 3,900	1,676			75					2		4,570	23,317
Other Expenditures:																	
42	Playground rebuild					3,000								27,775			30,775
43	Other - (specify)				2,388			3,563	80				50	919			7,000
44	Other - (specify)		13,511						106				94				13,711
45	Other - (specify)		511														511
	Other - (specify)																-
Technology:																	
46	Actual technology Spending	\$ 9,940		\$ 23,981		\$ 2,646		\$ 6,162	\$ 7,028	\$ 9,464	\$ 13,000	\$ 18,391	\$ 5,275	\$ 3,363	\$ 4,930		104,180
47	TOTAL Budgeted PTO Spending (inc other gifts)	\$ 99,083	\$ 57,133	\$ 68,560	\$ 53,734	\$ 51,465	\$ 41,137	\$ 49,818	\$ 32,003	\$ 88,720	\$ 68,833	\$ 52,306	\$ 35,049	\$ 78,097	\$ 38,829	\$ 115,635	\$ 930,402

** The number of students is the higher of the number of actual students on October 1 of the reported year or the number of students projected in the NPS enrollment report for that year.

** The Per Pupil Equity rate is approved annually per the Equity Policy. The Allowed Equity Spending is equal to the # of students set out in Line 2 or 3 (whichever is greater) x [the annual Per Pupil Equity Rate] x .55