

# **Third Report of the Equity Working Group to the School Committee**

## **May 9, 2022**

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### **The purpose of and charge to the Equity Working Group (EWG)**

The revised Equity Guidelines adopted by the School Committee in June 2018 called for the creation of a committee to “consider the feasibility of pooling PTO funds to achieve more equitable distribution of resources across the schools without further limiting the financial support that PTOs may provide.” The Equity Working Group (EWG) has taken this to be a broad charge to consider any type of central fund for any purpose that is consistent with the Equity Policy and Equity Guidelines.

The Equity Working Group (EWG) was formed by the Newton Public School District’s Equity Committee in November 2018. The EWG is currently comprised of six people:

Christine Dutt, parent (Burr, Day)

Kerry Prasad, parent (Countryside, Brown)

Maggie Schmidt, parent (Zervas, Oak Hill, Newton South)

Andrea Steenstrup, parent (Cabot (past), Day (past), Newton North)

Kathy Shields, School Committee member and parent (Ward, Bigelow)

\*Elementary Principal, Rotating

During the 2018-2019 school year, the NPS representatives were the principal at Underwood (Kathleen Smith) and the Assistant Principal at Angier (Orla Higgins Averill). The principal at Peirce (Mark Chitty) was the NPS representative for the 2019-2020 school year.

## **Summary of First Report of the EWG to the School Committee**

In April 2019, the EWG presented a comprehensive report to the School Committee that described its work in analyzing both the history of the Equity Guidelines and their implementation in Newton, as well as approaches to equity in PTO spending from around the country. The report also detailed the four data collection exercises the EWG conducted, each with different constituencies in Newton. Specifically, the EWG: 1) received input from elementary principals, 2) surveyed PTO treasurers about their school's fundraising efforts, 3) conducted four focus groups with active parent volunteers from each elementary school, and 4) surveyed elementary school PTO board members. Based on this work, the EWG presented to the School Committee in April 2019 about several potential approaches to a pooled funding structure that appeared feasible based on its work to date.

## **Summary of Second Report of the EWG to the School Committee**

The EWG submitted a second report to the School Committee on November 4, 2019. The bulk of this report describes the survey that the EWG designed and sent out to Newton Public School families through the district's Aspen communication system. Overall there were 1601 responses to the survey. 1,553 respondents answered the survey in English, while a total of 48 respondents answered the survey in another language. Surveys were available in 8 languages: English, Mandarin, Korean, Spanish, Russian, Hebrew, Portuguese, and Japanese.

The introduction to the survey stated "The Equity Working Group adopted the following definition of equity in relation to PTO spending: Equity means substantially similar access to enrichment opportunities and teacher classroom support across all schools. Equity also means that every individual and demographic group feels a sense of belonging in the community." The EWG adopted this definition of equity in PTO spending early in its work and feels it is important to remind the community that the EWG's scope is limited to consideration of PTO spending.

There were four basic sections to the community-wide survey:

1. Demographic questions
2. Questions about respondents' relationship with their schools' PTOs
3. Questions about spending from a potential central fund
4. Questions about fundraising for a potential central fund

### Demographic Questions

The survey asked what schools the respondents' children currently attend, or had attended in the past. Families from all Newton Public Schools elementary, middle and high schools were well-represented among the survey respondents. Similarly, the survey asked for the current grades of the respondents' students. The distribution of responses was fairly even across the elementary

schools grades, with each of grades K-6 representing between 14-16% of respondents. Grades 7-9 represented between 9-11% of respondents, grades 10-11 represented 8% of respondents, grade 12 represented 6% of respondents and post-high school represented 7% of respondents.

Based on the survey's demographics questions, the EWG feels that the survey represents a fair cross-section of the views of the Newton Public School community, and is not skewed to over-represent the views of a particular school or grade-level group.

### Relationship with the PTO

One aspect of the EWG's definition of equity is the aspiration that all school families feel included in their school communities. A primary goal of a school's PTO is to strengthen school communities so that all members feel included. Accordingly, a number of questions were designed to elicit respondent's participation in their school community, participation in their school's PTO, and feelings of inclusion or exclusion in their school community. 33% of respondents said they felt very included in their school community, while only 2.5% said they felt excluded. The top 4 ways in which respondents participate in their school community were informal connections (playdates, playground, conversations at drop off/pick up, etc); financial donations; attendance at PTO events with family; and volunteering in the school (room parent, library helper, field trip volunteer). Many respondents identified a decreasing sense of inclusion as their child progressed from elementary school to the secondary schools but there did not appear to be a normative value ascribed to this; people felt that the nature of a parents' involvement in the school would change as their child grew older. In regards to PTO fundraising, 80% of respondents felt the frequency with which their PTO asked for money was about right while 13.5% said the requests were too frequent. It is worth noting that 90% of survey respondents reported making financial contributions to their PTO.

### Spending from a potential central fund

The survey revealed a clear consensus for any potential central fund to provide money for Creative Arts and Sciences (CAS) programming (80%) and teacher/classroom support (79%).

A majority of respondents (55.3%) supported a multifaceted approach to determine eligibility for distributions from a central fund, meaning that a combination of demographic data, actual PTO fundraising data, and principal input should be considered. The survey results showed the Greatest Need Option had the most support out of the possible mechanisms to determine which schools receive funds (950 respondents ranked it as their favorite or second favorite option.) The Greatest Need Options would allocate funding on a percentage basis for need; the lower a school sits below an established threshold, the more that school receives. The closer a school sits to the threshold, the less than school would receive. Schools above the threshold would not receive a distribution from the central fund.

### Fundraising for a potential central fund

Close to three-quarters of respondents (73%) indicated they as individuals and/or family units would contribute to a central fund through Newton-wide fundraisers, like a restaurant night/week, family fundraising events and a written appeal.

The question of how PTOs might contribute to a potential central fund had garnered much discussion, some of which was divisive. In order to suss out peoples' opinions, the survey asked a number of questions about specific ways in which PTOs might contribute to a central fund.

The responses indicate a majority (67%) would support the "Raise the Bar" option, which would function similarly to Major League Baseball's luxury tax, by permitting PTOs to spend over the equity cap if a portion of funds spent over the cap were contributed to a central fund. However, the EWG agrees with the respondents who indicated the Raise the Bar option would perpetuate disparity in PTO spending while generating relatively little income for a central fund.

A similar percentage of survey respondents (62%) said they would support a "Flat Percentage Contribution", where each PTO contributes a set, small flat percentage (under 10%) of its total spending to a central fund. The narrative responses revealed a wide range of feelings about the Flat Percentage Contribution: some thought it would actually hurt PTOs that raise less money and others thought the Flat Percentage Contribution would only serve to penalize PTOs who raise lots of money. However, when asked if they would change the amount they donate to their PTO if they knew their PTO was contributing to a central fund, 15% of respondents said they would give more and 20% said they would give less. 27% of respondents indicated they did not know if their PTO donations would change if their PTO made voluntary contributions to a potential fund. This indicates that there is a core of support for voluntary PTO contributions of some kind to a potential fund. This also suggests that there is a need for more education and discussion in the community about a potential central fund. The members of the EWG have observed an increase in communication and collaboration between PTOs during the last 22 months that has come about as a result of the Covid-19 pandemic. and we wonder if the response to this question would be different if asked today. **Based on their individual observations, the EWG believes there would be even greater support among PTO leaders and the whole community for some kind of a central fund than there was in 2019.**

### Conclusions based on survey results

Based on the survey responses, the EWG concluded that a central fund is feasible, and enjoys sufficient community support to be successful in achieving the goal of increasing equity in PTO funding available across our schools. It is worth noting that a majority of survey respondents (over 70%) said they would contribute to a central fund. Newton is a generous community, and we believe the capacity exists to create a central fund to support equitable enrichment opportunities in the elementary schools.

The EWG has also reached the conclusion that funding for a central fund should come from a combination of sources, including both Newton-wide fundraising events organized specifically for this purpose, and voluntary contributions from PTOs.

## **EWG's Work Since the Second Report**

Though the EWG has been working to develop a plan to guide further implementation of a central fund, its work was largely derailed by the onset of the COVID pandemic in March 2020, and the needs of its members and the NPS community with which it was working, to focus on more urgent matters. At the same time, the changes wrought by the pandemic have seemed to foster a greater sense of interdependence than existed before in our school community. As parents and PTO leaders, the EWG members have seen more cooperation between schools than there was pre-pandemic, and more willingness to think about resources with a district-wide perspective, rather than a school-focused lens.

In terms of initial goal setting, the EWG first considered whether it would be best to start with a central fund that would help close the funding gap in elementary schools' ability to pay for Creative Arts and Sciences (CAS) programs. At the time, in late 2019/early 2020, the EWG estimated that the central fund would need approximately \$30,000 per year if it were to make grants to the roughly 6 schools that were below the median in CAS spending and did not appear to have other funds in their PTO budgets to make up the difference. The EWG thought of this \$30,000 per year target as a place to start, that if successful, could hopefully grow over time to provide funds in other areas, such as teacher/classroom support and library books.

One of the biggest questions after the EWG's second report was: *What legal entity would hold and manage the money for a central fund?* The EWG conducted exploratory conversations with NPS administrators and with a number of existing community organizations in an attempt to locate an existing 501(c)(3) tax-exempt entity that would be willing to assume the legal, administrative, audit and reporting obligations for a central fund. The EWG learned that NPS cannot hold the funds itself, because the methods of fundraising and spending do not accord with the rules applicable to NPS revolving accounts. For a variety of reasons, we were not able to interest other existing community organizations in taking on the Central Fund as a project they wanted to operate and administer.

Over the course of the last two years, the EWG has had extensive discussions with the Newton Schools Foundation (NSF). One of the three strategic grant areas of NSF's mission dovetails with the goal of the central fund - to reduce inequities arising from differing income levels in our 15 elementary school communities. However, NSF no longer acts as a fiscal agent for other groups, and NSF has, over the last several years, worked to transition other fundraising groups out of NSF and into

their own organizations (for example, the Global Education Leadership Fund, which helps fund study-abroad opportunities for Newton students who could not otherwise participate). The NSF Board is open to considering whether there are ways in which a central fund could be a part of NSF's fundraising and grant-giving mission, but far more work would need to be done to develop a plan that would fit with NSF's workload and administrative capacity constraints.

The EWG also considered whether it would be preferable to start a new 501(c)(3) entity whose sole purpose would be fundraising for, and administration of, the central fund. There are appealing aspects to this approach. The people who may agree to run such an entity would be able to focus their efforts on this particular fundraising goal, rather than being committed to a variety of projects. On the other hand, there may be concern in the community about donating to a new organization, without a track record, and without demonstrated safeguards in place.

The members of the current EWG do not have a consensus view as to whether it would be preferable to continue exploring a possible partnership with NSF or to attempt to recruit volunteers or staff to start a new 501(c)(3) entity.

Another question that the EWG struggled with was, assuming the central fund can raise \$30,000 per year as a starting point, *exactly what criteria should be used to distribute these funds among the elementary school PTOs.* The EWG understood that parents, PTOs and other organizations donating to the central fund would reasonably want to understand how the money would be spent before they decided to donate. The EWG developed several potential approaches to determining the relative need at the various elementary schools (based in part on the data about proportions of low income, economically-disadvantaged, and high needs students in each elementary school and the input of a group of elementary school principals), the EWG concluded that the group that undertakes the formation of the central fund should have the authority to decide what distribution standards to apply, because they will be the ones obligated to administer those rules.

## **EWG Conclusion**

There are very few similar US school districts that think about and have the long history of attaining PTO spending equity that Newton has. We believe Newton can be a leader on this issue if we collaboratively work to balance the PTO spending gap across our neighborhood schools through the creation of a community-supported central fund and the continued revision and rethinking of our Equity Guidelines.

The current EWG strongly believes a central fund is feasible. We are grateful for the community engagement that has led us to this conclusion, and we are firmly aligned in wanting to see a central fund established in the near future.

## **EWG Action Plan Recommendations for the School Committee**

1. Disband the Current EWG

All members of the current EWG agree it is time to disband the current EWG. This current group has been working on these issues for nearly 4 years and it is time for new volunteers. We believe our work has been valuable and that the continued goal of equity across our neighborhood schools is important and should continue with new engagement.

2. School Committee Support

The current EWG believes that, for a central fund to be created and be successful, the School Committee needs to express support for the creation of a central fund and emphasize the importance of this undertaking with the goal of finding community volunteers and leaders who are willing and able to make this a reality.

3. Create of a New EWG

The current EWG recommends that the School Committee solicit interest from the community in serving on a new iteration of the EWG. We feel greater community engagement and involvement in this effort is critical to a successful outcome. The current EWG recommends that the new EWG have representatives from the following constituencies: the School Committee, NPS administrators including an elementary school principal, PTO leaders, NPS families, NSF, METCO, SEPAC, FORJ, and other community non-profit leaders.

4. Begin this Endeavor Now

The current EWG recommends a new EWG be formed and begin earnestly working to start a central fund early in the fall of 2022. We believe the current environment in our district is ready for the creation of a collaborative central fund and want this work to move forward timely. Because of a combination of recent events – pandemic upheaval and PTOs needing to all try new things, schools being together in DLA classrooms, ease of connection enabled by

Zoom meetings, pandemic-related increased need in Newton for which community-based organizations have started with great support (i.e. Newton Neighbors Helping Neighbors-and the Community Freedge) – we find our PTO leaders and Newton families working collaboratively towards collective goals.

## **Central Fund Goals and Suggestions for the New EWG**

The current EWG believes in this work and wants to see the next steps taken to make a central fund a reality. We have provided the following central fund goals and suggestions to help propel this work forward under new leadership. We respectfully offer these ideas as a roadmap to launch new leadership into this work, and are not offering our ideas as the sole or best path forward. We encourage new leaders to reflect on our past work and move forward towards a solution that best fits now.

- Goals of a Central Fund
  - We believe the goals of a central fund are to build bridges across our community and to alleviate the discrepancies that exist in PTO spending across our neighborhood schools.
  - Based on years of collected elementary PTO budgets, it is clear not all Newton elementary school PTOs are able to meet all of their spending needs and requests which result in uneven experiences for our students, families and staff.
  - It is clear that vastly uneven spending has existed for many years across our elementary school PTOs. While continued changes to the Equity Guidelines are lessening the gap on allowable PTO equity-related spending, wide gaps remain in overall PTO spending.
  - Years of Equity Guideline revisions have lowered the total allowable PTO equity-related spending with the goal of lessening the PTO spending gap across the neighborhood schools. We believe a central fund which intends to reduce this spending gap by raising up the bottom will better move forward our district goals of equity and excellence.
  - We believe central fund dollars should ideally be shared across all of the elementary schools in Newton as need exists because NPS middle school and high school PTOs have similar budgets compared to their peer schools in NPS.
  
- Housing the Fund

Creating a new not-for-profit or partnering with an existing legal entity to hold and manage central fund dollars is a critical early decision, and we believe one that is likely to be the biggest hurdle to getting this fund started.



- We believe there are inherent challenges and benefits that exist both in partnering with an existing entity and in starting a new fund.
  - We believe there are natural synergies between a central fund and NSF. NSF has equity as one of their strategic grant areas which fits into the mission of this central fund seamlessly.
  - NSF has an excellent existing reputation in our community. We are concerned that starting another fund to benefit the Newton Public Schools could be seen as a rival to NSF, could be confusing in the community, and could result in competition rather than collaboration towards a similar goal.
  - We understand the biggest stumbling blocks to partnering with NSF is that NSF currently operates at full capacity with raising funds and evaluating and making grants.
  - It has been suggested that PTO Council house this fund, but this idea has not been widely considered. Current EWG and PTOC leaders feel PTO leadership turnover (PTO leaders are typically in their role for a 2 year period) would be a challenge to starting and maintaining a long-term fund under the PTOC. Constantly changing PTO leadership is both an asset and a challenge.
  - We believe the need in our city is great, bigger than just what exists in our schools. Starting a Newton community foundation, under which the central fund could exist, to benefit all the residents of Newton has been suggested. Finding the right leaders and organizations to partner and successfully build a Newton community foundation is a large task.
- Fund Governance & Leadership  
The central fund will need a dynamic group of individuals connected to the Newton community and our district schools. The fund will need leaders who are able fundraisers and skilled connectors.
  - Funding Sources & Community Support  
Our survey found individuals want central fund dollars to come from a combination of sources including voluntary PTO contributions, separate city-wide central fund specific fundraising activities and events, and through corporate donations. 73% of our survey respondents said they would donate to a central fund.
  - Items and Categories of Fund Distributions
    - Our survey found respondents overwhelmingly support that central fund dollars be spent on curriculum enrichment like CAS and libraries, followed by staff/teacher and classroom support, and then school community-building events.
    - There was a smaller mix of other responders that want central fund dollars to be used towards facilities and playground improvements, STEM and art funding, Special Education and SEL initiatives, and family fees like field trips and athletics.

- Most of these are items that PTOs already pay for at some level in each school, and are governed under the current Equity Guidelines.

- Distribution of the Dollars and Determining Needs

Our survey found little support for a grant application process because grants can be onerous for PTO volunteers and school staff.

Our survey found individuals support allocating fund dollars to the greatest needs in the school community, and that those needs should be calculated based on a combination of the below metrics.

- Based on student or school population needs as identified by Newton Public Schools and MA Department of Education data about the percentage of the school population that is economically disadvantaged, receives free/reduced price lunch, and has other categories of need.
- Based on the difference between what each school PTO has available to spend towards the current per pupil equity cap, and the current cap, as evidenced by the differences in PTO spending reported to the Equity Committee.
- Based on individual school principal and other school staff (ie social workers and school nurses) reports of school community needs.

Respectfully, we propose the following timeline for work on the creation and implementation of a central fund. It is up to the discretion of the new Equity Group to proceed as they choose but, based on all of our work and thought on this topic, this seems like a reasonable roadmap for the work.

## Timeline

School Committee disband current Equity Working Group (“EWG”)	Spring 2022
School Committee assembles new EWG who will commit to 3 years at the task of creating and implementing Central Fund	Spring 2022
<p>EWG begins their task</p> <ul style="list-style-type: none"> <li>● Chooses from “Potential Decision Matrix for Central Fund” (Appendix I) to make a Central Fund Plan</li> <li>● Meets with stakeholders and PTO leaders to discuss and help make Matrix choices <ul style="list-style-type: none"> <li>○ Meets with Equity Committee for their input and review of PTO spending data</li> <li>○ Could decide to meet with 2018-22 EWG</li> </ul> </li> <li>● Devises a structure and roles for Central Fund Leadership Team</li> </ul>	Fall 2022
EWG reports on their plan to School Committee	December 2022
<p>EWG publicizes and educates about their Central Fund Plan</p> <ul style="list-style-type: none"> <li>● PTOs will need detailed and clear information about the plan so they can factor it into their budget-making, which generally occurs in the spring</li> </ul> <p>EWG assembles a Governance and Leadership Team for the Central Fund</p>	Winter, Spring 2023
EWG reports to the School Committee	June 2023
Central Fund launches	Summer 2023
Central Fund fundraising and start-up period	2023-2024 School year
First distribution out of Central Fund	April/May 2024
EWG collects information about how Central Fund is working	2024-2025 School Year
EWG reports to the School Committee	December 2024
Second distribution out of Central Fund	April/May 2025

EWG collects information about how Central Fund is working	2025-2026 School Year
EWG reports to School Committee, may include recommendations to change Central Fund	November 2025
School Committee makes any changes to the Central Fund	December 2025
School Committee and EWG publicize changes to the Central Fund, if any, to PTOs and community	January & February 2026
Third Distribution from the Central Fund	April/May 2026

## Appendix I

### Potential Decision Matrix for Central Fund

Choose one from each column to create the Central Fund Plan.

<b>What</b> will it pay for?	<b>Where</b> will it sit?	<b>How</b> will it get money in?*	<b>Who</b> Which schools will receive money?
<input type="checkbox"/> Library Books <input type="checkbox"/> Staff/Teacher Classroom Support <input type="checkbox"/> Community Events <input type="checkbox"/> CAS	<input type="checkbox"/> Newton Schools Foundation <input type="checkbox"/> PTO Council <input type="checkbox"/> New Not-for-Profit	<input type="checkbox"/> PTO Contributions <input type="checkbox"/> Blanket ask <input type="checkbox"/> Fundraiser	<input type="checkbox"/> Per pupil basis <input type="checkbox"/> Based on economic needs of student population

\*Additional option: in addition to your choice, solicit funds from businesses