



Acton-Boxborough Regional  
School Committee Meeting  
Followed by Executive Session

November 19, 2015

7:00 p.m.

at the R.J. Grey Junior High Library

ACTON-BOXBOROUGH REGIONAL SCHOOL COMMITTEE (ABRSC) MEETING

Library  
R.J. Grey Junior High School

November 19, 2015  
7:00 p.m.  
Followed by Executive Session

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AGENDA

1. **Call to Order** (7:00)
2. **Chairman's Introduction**
3. **Statement of Warrant**
4. **Approval of Minutes**
  - 4.1. Minutes of Meetings on 11/5/15 (*next meeting*) and 11/10/15
5. **Public Participation** (7:05)
6. **Existing Conditions Study Report Update from Dore & Whittier** – *Glenn Brand, JD Head* (7:10)
7. **FY17 Fees Review/Recommendations Presentation –First Read** - *Glenn Brand* (8:10)
  - 7.1. Athletics – *Steve Martin*
  - 7.2. Kindergarten – *Erin Bettez*
  - 7.3. ABRSD Early Childhood Program – *Joe Gibowicz*
  - 7.4. Occupational Development Program (ODP) – *Mary Emmons*
8. **Potential Solar Net Metering Agreement Overview** – *JD Head* (8:40)
9. **FY17 ABRSD School Calendar – Second Reading – VOTE** - *Glenn Brand, Marie Altieri* (8:50)
  - 9.1. School Year/School Calendar, Policy File: IC/ICA
  - 9.2. Staff Survey Results
  - 9.3. Draft FY17 Proposed Calendar (no change from 11/5/15 meeting)
10. **Financial Reports** – *Clare Jeannotte* (9:00)
  - 10.1. 1st Quarter FY16 Financial Report
  - 10.2. Foundation Budget Review Commission Report, 10/30/15
  - 10.3. Recommendation to Accept Grant from Toshiba America Foundation to ABRHS – **VOTE** – *Glenn Brand*
11. **MASC District Governance Program Update** – *Kristina Rychlik* (9:10)
  - 11.1. Recommendation to Approve ABRSC Goals – **Second Reading – VOTE**
  - 11.2. Final Workshop on January 6 at 7:00 p.m.
12. **Subcommittee Reports** (9:05)
  - 12.1. Budget – *Maria Neyland* (*oral*)

- 12.2. Policy –
  - 12.2.1. **School Councils**, File: BDFA – **Second Read – VOTE** - Glenn Brand
    - 12.2.1.1. Procedures: School Improvement Plan, BDFA-R-1, Submission and Approval of the School Improvement Plan, BDFA-R-2, Conduct of School Council Business, BDFA-E-3
    - 12.2.2. **New School Committee Member Orientation**, File: BIA – **Second Read – VOTE** - Kathleen Neville
  - 12.3. Demographic Study Update – Mike Coppolino (oral)
  - 12.4. Legislative – Paul Murphy (oral)
- 13. **School Committee Member Reports (9:15)**
  - 13.1. Acton Leadership Group (ALG) – Kristina Rychlik, Paul Murphy
    - 13.1.1. Meeting minutes - 10/29/15
  - 13.2. Boxborough Leadership Forum (BLF) – Maria Neyland (3 Board Meeting on 11/30/15)
  - 13.3. Health Insurance Trust (HIT)– Mary Brolin
  - 13.4. Acton Finance Committee – Kristina Rychlik, Deanne O’Sullivan
  - 13.5. Acton Board of Selectmen – Mike Coppolino, Paul Murphy
  - 13.6. Boxborough Finance Committee- Mary Brolin
  - 13.7. Boxborough Board of Selectmen – Maria Neyland, Brigid Bieber
  - 13.8. Minuteman Tech Update – Diane Baum
  - 13.9. PTO/PTSO/PTF Co-Chairs– Deanne O’Sullivan
  - 13.10. Letter of Support for Outdoor Playspaces Proposal to Boxborough Community Preservation Committee – Katie Neville
- 14. **Acton Special Town Meeting re Citizens’ Petition (11/10/15) Report – Kristina Rychlik (9:20)**
  - 14.1. Amended Article, distributed at Town Meeting
  - 14.2. Final ABRSC Statement
  - 14.3. Warrant found at <http://www.acton-ma.gov/ArchiveCenter/ViewFile/Item/7371>
- 15. **Superintendent’s Report – Glenn Brand (9:25)**
  - 15.1. Report of Professional Learning Day, 11/3/15, Deborah Bookis
  - 15.2. Advisement on Administration Compensation
- 16. **Senior Leadership Administrative Restructuring Proposal – Second Reading – VOTE** - Glenn Brand (9:30)
- 17. **FOR YOUR INFORMATION**
  - 17.1. ABRHS Discipline Report, October 2015
  - 17.2. RJGJHS Discipline Report, October 2015
  - 17.3. Quarterly Newsletter from ABRSD Special Education Director, Mary Emmons, 11/6/15
  - 17.4. High Needs Population Trends: An Update, AB Special Education Parent Advisory Council (SpedPAC), 10/29/15
  - 17.5. Monthly Enrollment, 11/1/15
  - 17.6. Dismissal Schedule for Wednesday, 11/25/15
  - 17.7. NEW Service: Cross-Acton Transit Schedule (free until Jan 1<sup>st</sup>)
  - 17.8. Press Release: Board of Elementary & Secondary Education Approves Path to Next-Generation MCAS, 11/17/15
- 18. **EXECUTIVE SESSION:**

18.1. Executive Session pursuant to MGL c. 30A, § 21(a)(7) to comply with any general or special law requirements (i.e., c. 30A, § 22(f) and(g)) for the approval of executive session minutes for:

- 12/11/14
- 1/22/15
- 3/19/15
- 6/25/15
- 7/22/15

18.2. Executive Session pursuant to MGL c. 30A, § 21(a)(3) to discuss strategy with respect to litigation (i.e., Decision dated November 13, 2015).

## 19. Adjourn

### **NEXT MEETINGS:**

Nov 30	ABRSC/Boxborough 3 Board Meeting	7:00 p.m. in XXX
Dec 3	ABRSC Meeting	7:00 p.m. in Jr High Library
Dec 17	ABRSC Meeting	7:00 p.m. in Jr High Library
Jan 6 (Wed)	Final Governance Workshop	7:00 p.m. in the Jr High

ACTON-BOXBOROUGH REGIONAL SCHOOL COMMITTEE (ABRSC) MEETING  
(Prior to Acton Special Town Meeting)  
DRAFT Minutes

Room 102E  
Acton-Boxborough Regional High School

November 10, 2015  
6:30 p.m.

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*Members Present:* Diane Baum, Amy Krishnamurthy, Paul Murphy, Kathleen Neville, Kristina Rychlik, Mary Brolin, Michael Coppolino, Maria Neyland  
*Members Absent:* Brigid Bieber, Maya Minkin, Deanne O'Sullivan  
*Others:* Deborah Bookis, Glenn Brand, Beth Petr

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The ABRSC was called to order at 6:35 p.m. by Chairwoman Kristina Rychlik.

The Committee discussed the statement that Kristina proposed to read at the meeting and the frustration that the final wording of this article was not available until Town Meeting attendees arrived at the High School. This made it very difficult for the School Committee to respond.

Mike Coppolino moved, Maria Neyland seconded and it was unanimously,

**VOTED:** that the Acton-Boxborough Regional School Committee does not support the citizens' petition.

It was the sense of the Committee that Kristina's statement appropriately represented the School Committee's position.

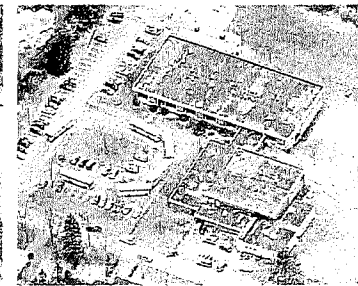
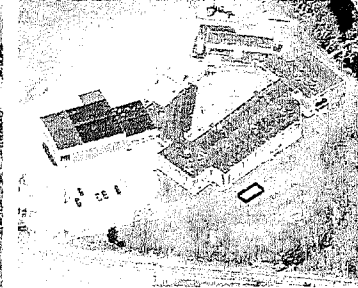
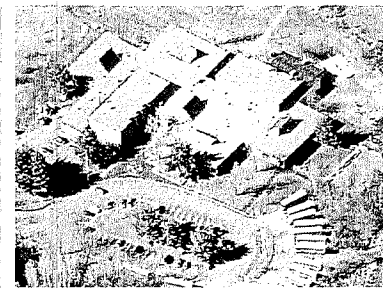
The ABRSC adjourned at 6:50 p.m.

Respectfully submitted,  
Beth Petr

List of Documents Used: Draft ABRSC Statement to be read by the Chairwoman  
ABRSC Statement voted 11/5/15  
Amended Citizens' Petition/Article 1 handout received at the Special Town Meeting

posted separately from packet  
due to file size

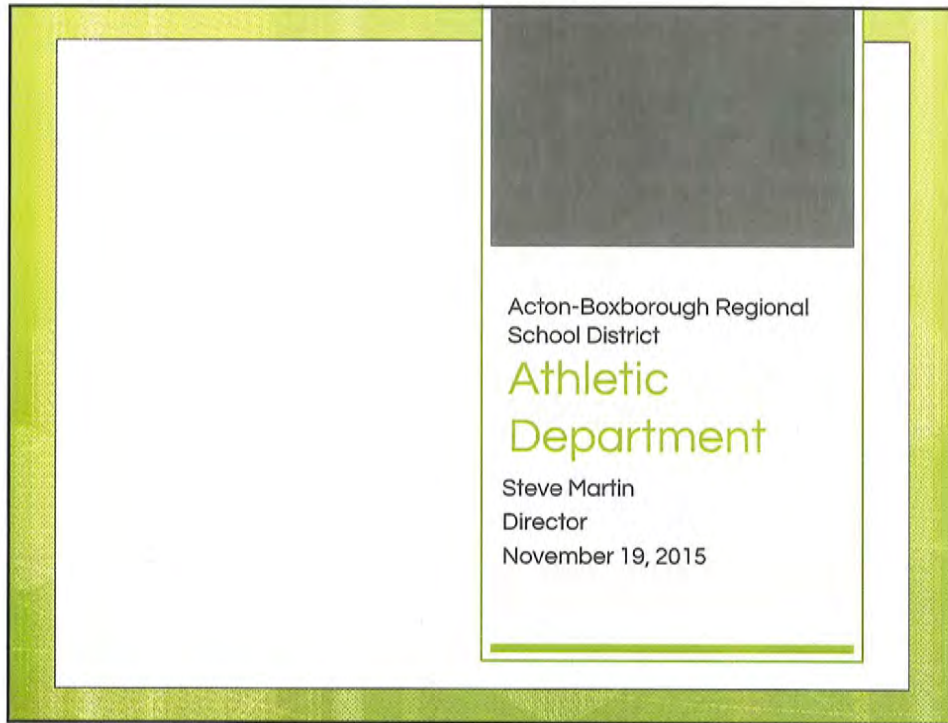
# Acton Boxborough Regional School District School Facilities Assessment



*Progress Presentation*

*19 November 2015*

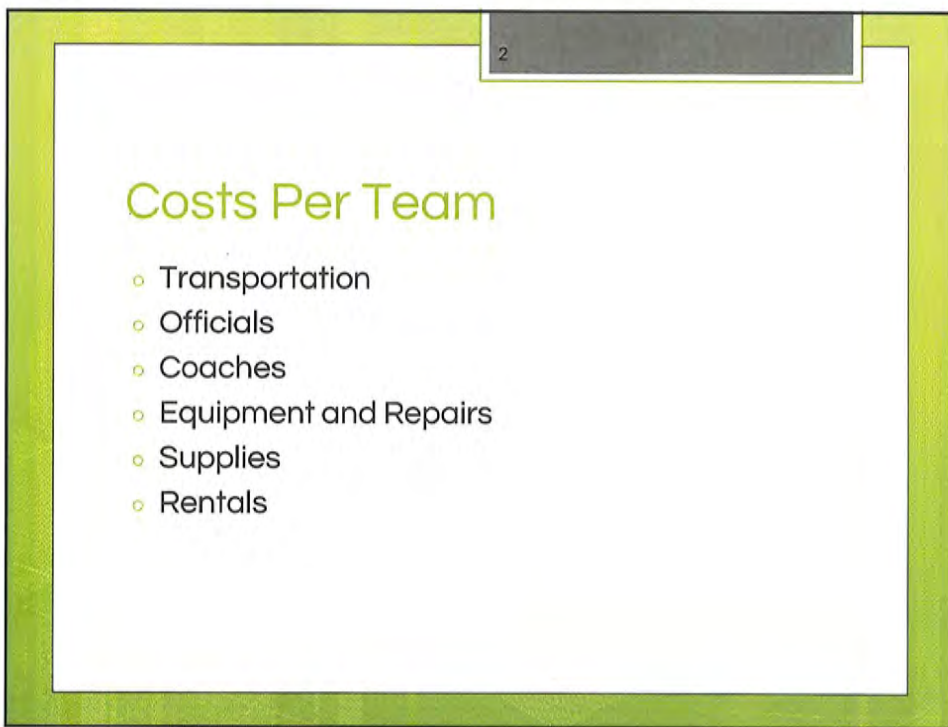
DORE & WHITTIER  
ARCHITECTS, INC.



Acton-Boxborough Regional  
School District

## Athletic Department

Steve Martin  
Director  
November 19, 2015



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## Costs Per Team

- o Transportation
- o Officials
- o Coaches
- o Equipment and Repairs
- o Supplies
- o Rentals

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## Example of what a smaller team's flow of money looks like

### Costs:

- o Coach \$5,000
- o Officials \$1,120
- o Transportation \$3,000
- o Supplies \$150
- o Total Cost \$9,270

### Revenue:

- o 20 kids on a team
- o Total Revenue \$4,100

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## Other Costs To Department

- o Insurance
- o Membership
- o Event Coverage
- o Uniforms (subsidized by boosters recently)
- o Building and Grounds
- o Custodian
- o Repairs
- o Upkeep
- o Safety Equipment
- o Salaries



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## Percentages of the Budget

- Total actual operating costs of program in FY 15 was \$1,059,636.38
- ABSAF Donations were 4% of the revenue
- Gate Receipts were 4% of the revenue
- Fees were 31% of the revenue
- Appropriated was 61% of the revenue

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## Revenue

- User Fees
- Acton Boxborough Students Activity Fund (ABSAF)
- Gifts
- Gates

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## History

- o Budget cut by almost \$72,000 in FY 11
- o According to documentation we were to cut 7<sup>th</sup> Grade Athletics for a savings of \$24,000
- o Understanding that we would have an up charge of \$200 for Ice hockey, Alpine Ski, and Gymnastics (Increase Revenue \$13,000, \$5,800, \$3,200)
- o Reduction of Athletic Revolving Budget of \$8,670
- o Activity fee increase of \$15 from \$190 -\$205 for increased revenue of \$24,330

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## History (cont)

- o We did not cut 7<sup>th</sup> Grade Athletics
  - o Girls Soccer did not have the interest
  - o Boys Soccer could not get a schedule
  - o Still have Field Hockey, Boys and Girls Basketball
- o Hockey, Gymnastics, and Ski numbers have not been at the maximum used in the totals for most of the time
- o There was an expectation to REDUCE participation fees via corporate sponsorships in this agreement.

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## History (cont)

- o Gate receipts from FY11 to FY 15 have decreased from \$67,662.50 to \$46,991.64, a difference of -\$20,670.86
- o ABSAF funding has increased from \$44,000 to \$46,000 in FY16
- o Gifts have decreased from \$25,386 to \$3,000
- o Athletic Fees Collected have dropped from \$372,157 to \$326,291

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## Trend Highlights:

- o Salary Increases
- o Budget Cut FY11 \$71,930.20
- o Decrease in Participants
- o Transportation Costs
- o Decrease in Gate Receipts
- o Impact: four (4) consecutive years with a deficit

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## Cost Saving/Revenue Generating Attempts

- Custodial Staff
  - Football
- Event Staff
  - Closed Gates
  - Use of salary staff
- Waivers
- Police
- Prices
- Supplies cut 20% for non track sports
- Possible JV/V Track-Saves bus for away meets
- State Track Meet Host-\$ to track boosters to pay some high need and expensive safety items

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## FY16 Highlights vs. FY15

- Custodial Down \$124.41
- Event Staff Down \$2,317.34
- Revenue is up \$1750.00
  - Even though there are 42 less students
    - Decrease of \$8,610 in revenue
  - Gate receipts are up \$5,900 (\$17,431 total in)
  - Waivers Decreased \$2,050

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## Early Outlook for FY16

- With continual anticipated decline in participation trends, expected that the department will end with a deficit similar to last year exceeding approximately \$60,000
- Realistic outcome is that the deficit does not increase

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## Why?

- Salaries are increasing on the revolving side
  - FY15= \$168,060.00
  - FY16= \$169,740.60
  - FY17= \$171,438.01

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## Participation Numbers Continue to Decrease

### Fall

- FY 14-673 students
- FY 15-668 "
- FY 16-626 "

### Winter

- FY 13-494 students
- FY 14-475 "
- FY 15-430 "

### Spring

- FY 13-727 students
- FY 14-712 "
- FY 15-706 "

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## Decreased Numbers

- Is a decrease in participation numbers a decrease in services and therefore a decrease in cost?
- No. Decrease is spread across all sports and not focused on one sport.
- We expect to have an increase of one team compared to two years ago. Cost therefore will increase.

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## Concerns

Sacrifices made are catching up to the department

- Uniforms
  - Ex. FH-5 teams @ 7 yrs= 35 years old
- Equipment needs
- Inability to invest in equipment/uniform replacement given absence of budget

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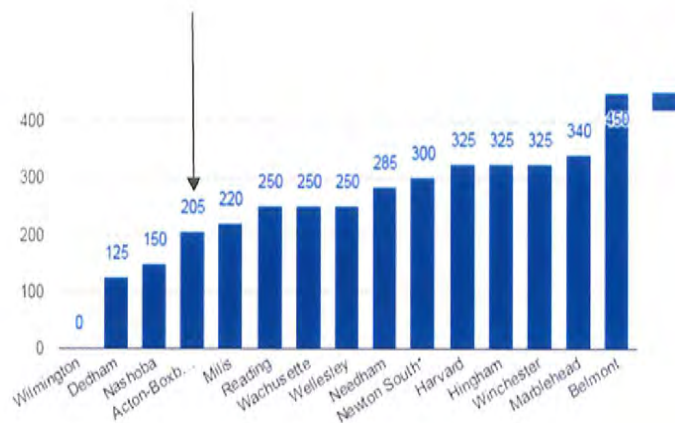
## Future Program Investments

- Uniforms (ideally would be investing \$10 - 15,000 per year for replacement)
- Equipment Needs
  - Pole Vault Pit \$17,000
  - Wrestling Mats \$6,000
  - Scoreboards in Field House/30 Sec \$7,500
  - Gymnastics Spring Floor \$6,000
  - Soccer Goals \$4,500
  - Lacrosse Goals \$750

## Community Comparisons Athletic User Fees

- Belmont \$450
- Dedham \$125
- Harvard \$325 for Varsity (varies by sport and level)
- Hingham \$325 1X
- Millis \$220
- Marblehead \$340 1X
- Wilmington \$0
- Winchester \$325
- Nashoba \$150
- Needham \$285
- Reading \$250
- Wachusett \$250
- Wellesley \$250
- CC \$250
- LS \$365
- Newton S \$300
- Wayland \$300
- Westford \$225
- Weston, Waltham, Bedford, Cambridge, Boston Latin \$0

### Comparable Communities Athletic User Fees





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## Proposal

- An increase to the athletic fee of \$45
- Sports that have an initial cost like ski, hockey, gymnastics would charge an additional \$250 for students to play
- Family cap to \$1500 per year

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## Transportation Costs

- FY 14 - \$87,879.14
- FY 13 - \$68,739.30
- FY 12 - \$91,792.89
- FY 11- \$74,079.22
- FY 10 - \$54,375.13

		23	
FY	15 Actual	16 Projected	17 Projected
ABSAF	\$41,000.00	\$46,000.00	\$46,000.00
Gate	\$43,144.36	\$47,000.00	\$47,000.00
Fees	\$329,786.00	\$319,892.42	\$310,295.65
Gifts	\$4,352.25	\$4,000.00	\$4,000.00
Appropriated	\$578,961.00	\$587,065.00	\$590,589.12
<b>Total Revenue</b>	<b>\$997,243.64</b>	<b>\$1,003,957.03</b>	<b>\$997,893.77</b>
Salary Appropriated	\$495,548.67	\$500,504.16	\$505,509.20
Operating Appropriated	\$149,805.07	\$148,307.02	\$146,823.95
Salary Revolving	\$203,606.86	\$205,642.93	\$207,699.40
Operating revolving	\$169,927.78	\$168,228.50	\$166,546.21
Revolving Officials	\$40,748.00	\$41,970.44	\$43,229.55
<b>Total Expenses</b>	<b>\$1,059,636.38</b>	<b>\$1,064,653.05</b>	<b>\$1,069,808.32</b>
Difference	-\$62,392.74	-\$60,696.02	-\$71,914.56

		24
FY	17 Projected	
ABSAF	\$46,000.00	
Gate	\$47,000.00	
Fees ( with \$45 increase)	\$386,345.65	
Gifts	\$4,000.00	
Appropriated	\$590,589.12	
<b>Total Revenue</b>	<b>\$1,073,934.77</b>	
Salary Appropriated	\$505,509.20	
Operating Appropriated	\$146,823.95	
Salary Revolving	\$207,699.40	
Operating revolving	\$166,546.21	
Revolving Officials	\$43,229.55	
<b>Total Expenses</b>	<b>\$1,069,808.32</b>	
End of year Balance	+\$4126.45	

## In Closing

- The proposed fee increase is for 2016-2017
- Analysis of expenses and revenue will continue to be necessary
- If expenses continue to exceed revenue, the following could be possibilities:
  - Additional fee increases
  - Additional investment of appropriated budget
  - Reduction in program offerings

**COMPARABLE COMMUNITIES USER FEES**

**Fall 2015**

**BELMONT**

1st sport \$450.00  
2nd sport \$300.00  
3rd sport \$150.00  
No family cap  
Waiver are determined individually based on household income and free and reduced lunch scale.

**DEDHAM:**

\$125 per sport...\$500 family cap  
Free/Reduced lunch students do not have to pay the fee.

**HARVARD:**

We do charge user fees.  
They do range a little bit depending on the level and the sport.

Fall

V/JV B/G Soccer \$325  
JV-2 Boys Soccer \$300  
V/JV FH \$325  
B/G XC \$260  
Golf \$360

Winter

V/JV B/G Basketball \$395  
B/G Swimming \$370  
B/G Inddor Track \$280  
B/G Ski Team \$360

Spring

V/JV G/B Lax \$325  
V B/G Tennis \$325  
V/JV Softball \$340  
V/JV Baseball \$340  
B/G Track \$280

Our MS sports are all \$300.  
We do not have a family cap.  
We do have a waiver. Parents have to apply for the waiver.

**HINGHAM**

Hingham charges 325.00 per student for the year (they pay 325 and can play up to 3 sports). We have a family cap of 625.00. There are a few exceptions - we add an extra 100.00 if a student plays ice hockey. We have a rowing program that is not really funded by the school. We fund a small portion. Those students pay 650.00 per season and their fee goes directly to the rowing program. The other fees go into the athletic revolving account. Students who receive free/reduced lunch are exempt. If someone presents a hardship, we can reduce or waive the fee. In other words, if someone is going through a rough patch, we can make an exception.

**MARBLEHEAD** \$340 per year( not per sport)  
\$480 family max per year. (Not per sport)

**MILTON**

**WILMINGTON** Does not have user fees

**WINCHESTER** \$325 per sport/per season,  
with a \$1300 family cap.  
Are waiver process is the same.

**NASHOBA** \$150 user fee per athlete per sport. No family caps. We do offer financial assistance and waivers for students who have been approved for free/reduced lunch at school.

**NEEDHAM** 1. Does your school have an athletic user fee? **YES**  
2. Amount? **Interscholastic Sports: \$285.00 / \*Club Sports: \$225.00**  
3. Is the fee per year or per school season? **PER SEASON**  
4. What (if any) is the family cap? **4 SPORTS PER YEAR or \$1,140.00 (surcharges not included against the cap)**  
5. Do you have self-funded sports? **\*Club Sports Program (within Athletics Department) funded through Revolving Account using only Student Feesto cover all expenses (no Operating Budget contribution). Programs include: Fall & Winter Club Dance; Fall & Winter Club Cheer; Fall & Spring Club Sailing; Winter Club Bowling; Winter Club Squash; and Spring Club Boys & Girls Ultimate Frisbee. (Fencing and Snowboarding in Winter and Water Polo in Spring will start this year.)**  
6. Do you have sports that pay an extra fee (for example ice hockey)? / Other information that may be unique to your school?

**-BOYS & GIRLS ICE HOCKEY and BOYS & GIRLS ALPINE SKI have additional \$250.00 SURCHARGE**  
**-BOYS and GIRLS SWIMMING & DIVING have additional \$50.00 SURCHARGE**  
**-CLUB SAILING has additional \$175.00 SURCHARGE**  
**-CLUB SQUASH has an additional \$175.00 SURCHARGE**  
**-CLUB BOWLING has an additional \$75.00 SURCHARGE**  
**-CLUB FENCING will have a \$125.00 SURCHARGE**  
**-CLUB SNOWBOARDING will have a \$175.00 SURCHARGE**  
**-CLUB WATER POLO will have a \$75.00 SURCHARGE**

7. Unique payment structures?

**-REDUCTION OF FEE OPTION AVAILABLE FOR THOSE STUDENTS ON THE DISTRICT'S FREE & REDUCED LUNCH PLAN AND FOR FINANCIAL HARDSHIP SITUATIONS.**

- **IF ON FREE & REDUCED PLAN, FEE IS AUTOMATICALLY REDUCED TO \$50.00 FOR THAT SPORT SEASON IF FAMILY SUBMITS WAIVER FORM.**
  - **IN CASES OF HARDSHIP, IF WAIVER REQUEST IS GRANTED, FEE REDUCED TO \$100.00 FOR THAT SPORT SEASON.**
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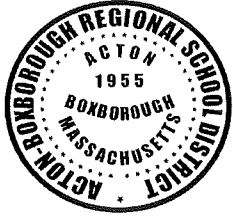
**READING** User Fees are \$250 per student per season (Fall, Winter, Spring). The student cap is \$600 and the family cap is \$950. We also do waivers based on Free/Reduced Lunch discounts.

**WACHUSETT** \$250 per student per season,  
\$350 family cap per season.

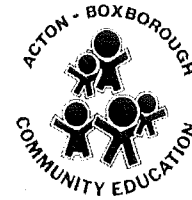
Reduced lunch students pay \$125 per student per season  
\$175 family cap.  
Free lunch students participate at no charge.

**WELLESLEY** Fee is \$250 and the family cap is \$1,500.

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Acton-Boxborough Regional School District  
Community Education  
15 Charter Road, Acton, MA 01720  
978-266-2525 fax: 978-266-2540  
[www.abce.abschools.org](http://www.abce.abschools.org)



7.2

Erin O'Brien Bettez, Director  
[ebettez@abschools.org](mailto:ebettez@abschools.org)

#### MEMORANDUM

TO: Glenn Brand, Superintendent  
FR: Erin Bettez, Community Education Director  
RE: FY17 All Day Kindergarten Tuition  
DATE: November 12, 2015

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After reviewing expenses associated with operating All Day Kindergarten in FY17, Community Education recommends a tuition rate of \$4,500. This is an increase from the current tuition of \$4,300.

We reached this figure after running multiple scenarios and seeing how the potential revenues generated by each compared to anticipated program expenses. Financial considerations include: teacher and assistant salaries, supplies, an administrative fee, any surplus or deficit from the previous year, and the potential demand for scholarships. Note: Starting in FY17 families who choose to pay by credit card will be assessed a credit card fee so that will no longer be borne by the revolving fund, eliminating that expense from the budget.

The "hybrid" model, which has been used at Blanchard for many years and which we also used at Conant this year, is a classroom with a mix of all day and half day students. The half day students leave in the middle of the day. Half day students can move to all day at some point during the year. We recommend implementing the hybrid model as long as there is sufficient enrollment to cover program costs. The final designation of all day/half day/hybrid classes would best be made after Kindergarten registration has taken place and we can assess the demand for ADK.

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

## FY16 ADK Snapshot

- 165 students across 10 classes (FY15 169 in 9 classes)
- Average # ADK students per class 16.5 (FY15 18.7)
  - Blanchard 2 Hybrid
  - Conant 2 Hybrid, 1 half day class
  - Douglas 2 ADK, 1 half day class
  - Gates 1 ADK, 1 half day class
  - McCarthy-Towne 2 ADK, 1 half day class
  - Merriam 1 ADK, 2 half day classes
- Teacher & Assistant salaries are shared by appropriated budget and ADK tuition
  - \$653,889 supported by tuitions

## How is ADK Tuition Projected?

- Scenarios run by potential class size
- Factors include:
  - Teacher salaries
  - Supplies
  - Administration Fee
  - Any surplus from previous year
  - Credit card fees *eliminated* as expense for FY17

Any surplus to be used for scholarships.



**FY17 ADK Projection**  
**Tuition at \$4,500**  
**4 Hybrid/7 ADK/4 half day**

School	17 Students		18 Students		19 Students	
Blanchard (2 Hybrid)	26	\$117,000	28	\$126,000	30	\$135,000
Conant (2 ADK)	34	\$153,000	36	\$162,000	38	\$171,000
Douglas (2 Hybrid)	26	\$117,000	28	\$126,000	30	\$135,000
Gates (1 ADK)	17	\$76,500	18	\$81,000	19	\$85,500
McT (2 ADK)	34	\$153,000	36	\$162,000	38	\$171,000
Merriam (2 ADK)	34	\$153,000	36	\$162,000	38	\$171,000
	<b>171</b>	<b>\$769,500</b>	<b>182</b>	<b>\$819,000</b>	<b>193</b>	<b>\$868,500</b>
plus FY16 surplus		\$0.00		\$0		\$0
<b>Est. Max Revenues</b>		<b>\$769,500.00</b>		<b>\$819,000</b>		<b>\$868,500</b>
<b>Expenses:</b>						
Head Teachers		\$449,838		\$449,838		\$449,838
Assistants		\$267,693		\$267,693		\$267,693
Admin Fee - 5% max revenue		\$38,475		\$40,950		\$43,425
Supplies: 11 @ \$2300, 4 @ \$600		\$27,700		\$27,700		\$27,700
		<b>\$783,706</b>		<b>\$786,181</b>		<b>\$788,656</b>
<b>DEFICIT/SURPLUS:</b>		<b>(\$14,206)</b>		<b>\$32,819</b>		<b>\$79,844</b>

1. Hybrids estimate 13/17 students, 14/18 students, 15/19 choose full day option  
 2. Any surplus would be used to support scholarships.

## Considerations for FY17

- No surplus predicted from FY16
- Scholarships always an unknown

FY10	\$28,420
FY11	\$11,300
FY12	\$15,350
FY13	\$30,310
FY14	\$55,220
FY15	\$14,980
FY16	\$18,870



Acton-Boxborough Regional School District  
Administration Building  
15 Charter Road Acton, MA 01720  
978-264-4700 fax: 978-264-3341  
www.abschools.org

7.3

Office of Pupil Services

To: Superintendent, Glenn Brand  
CC: Director of Finance, Clare Jeannotte  
From: Early Childhood Coordinator, Joe Gibowicz  
Re: FY '17 Acton-Boxborough Regional School District Early Childhood Tuition  
Date: 11/9/15

---

I have recommended the following tuition rates for the Acton-Boxborough Regional School District Early Childhood Program for FY '17. I have also attached a list of yearly tuition costs of local private preschools and comparable public school districts with similar integrated preschool programs.

- All Day Program; \$6830
- Half Day Program; \$3530

Trends from previous years:

Year	FY 10	FY 11	FY 12	FY 13	FY 14	FY 15	FY 16
½ Day	\$3000	\$3000	\$3100	\$3410	\$3530	\$3530	\$3530
Full Day	\$5810	\$5810	\$6010	\$6610	\$6830	\$6830 \$5000**	\$6830

\*\*Boxborough Early Childhood 3/4 day program

Prek Program	Public/Private	Yearly Tuition Half Day Days/Hrs	Full Day Tuition & Hours
<b>Acton-Boxborough Early Childhood Program</b>	<b>Public</b>	<b>\$3530 11 hrs / week</b>	<b>\$6830 26 hrs / week</b>
Acton Coop	Private	\$3620 10 hrs/ week	N/A
Acton Barn	Private	\$4221* 10 hrs/week	N/A
Boxboro Children's Center	Private	\$3950 (based on monthly rate) 9 hrs/week	\$10,000 (based on monthly rate) 30 hrs/week
Infant Toddler Center (ITC)* 3 year olds	Private	\$5231 (based on posted hourly rate) 11 hrs / week	\$11, 250 (based on posted hourly rate) 26 hrs / week
Infant Toddler Center (ITC)* 4 year olds	Private	\$5124 (based on posted hourly rate) 11 hrs / week	\$11, 044 (based on posted hourly rate) 26 hrs / week
Mt. Calvary Preschool	Private	\$3396 11 hrs/week	N/A
*2014-2015 rate			

School District	Public/ Private	Yearly Tuition Half Day Days/Hrs	Full Day Tuition & Hours
<b>Acton-Boxborough</b>	<b>Public</b>	<b>\$3530</b> <b>11 hrs / week</b>	<b>\$6830</b> <b>26 hrs / week</b>
Concord Public School	Public	\$3000 10 hrs / week	\$6000 22 hrs / week
Dedham Public School	Public	\$2633 12.5 hrs / week	\$6318 31.25 hrs / week
Harvard Public School	Public	\$3800 12.5 hrs / week	Only extended day as option
Hingham Public School	Public	\$2380 10 hrs / week	N/A
Milton Public School	Public	\$3125 12.5 hrs / week	\$8790 52.5 hrs / week **
Reading Public School	Public	\$3500 12.5 hrs / week	\$7500 28 hrs / week
Sudbury Public School	Public	\$4050 10 hrs / week	N/A
Westford Public School	Public	\$3420 10 hrs / week	\$6350 26.5 hrs / week
Winchester Public School	Public	\$3528 12.5 hrs / week	\$7446 27.5 hrs / week
** Pilot Program			

November 17, 2015

To: Glenn Brand

From: Mary Emmons

Copy: Clare Jeannotte

RE: Acton-Boxborough Regional School District – FY16 Special Education Program Tuition Rates

The following tuition rates are recommended for the Acton-Boxborough Regional School District Special Education Occupational Development Program (ODP) located at the Acton-Boxborough Regional High School for the current 2015-2016 school year as well as the 2017-2018 school year.

School districts set tuition rates for Special Education programs. Tuition rates represent a fee that is appropriate for a public school program. The tuition remained the same for the FY15 and FY16 school year. A 2% increase has been applied to the proposed FY17 rate to address staffing salary increases.

These tuitions are charged to public school districts who tuition Special Education students into our program.

Trends:

FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17
\$27,965	\$27,965	\$27,965	\$29,243	\$29,243	\$32,258	\$32,258	\$32,905

\*Additional Summer Program \$4,500

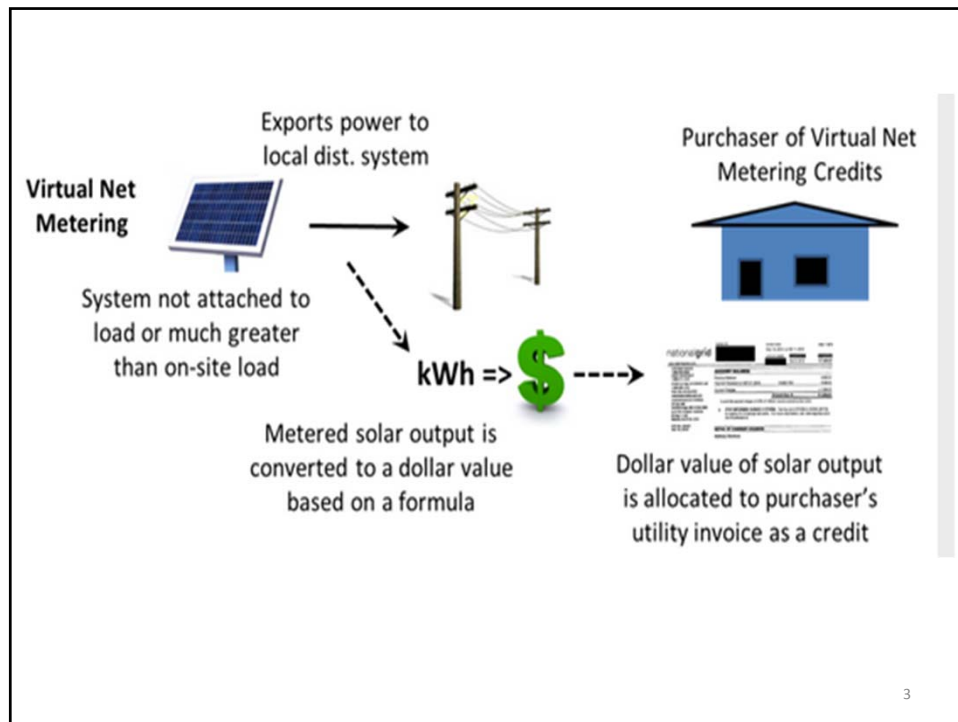
## Acton-Boxborough Regional School District

### Solar Net Metering Opportunity

November 19, 2015

### What is Net Metering?

- A system in which solar panels or other renewable energy generators are connected to a public-utility power grid ([Nstar via the NEMA load zone](#)) and surplus power is transferred onto the grid, allowing customers to offset the cost of power drawn from the utility.
- A “coupon” or “gift card” redeemable at one and only one location.



## Why do it?

- Creative revenue generation opportunity for the District
- Off-set rising electrical costs
- Leverage the position of the District as a public entity to support an industry that has sweeping positive impacts on environment and economy
- Looming changes in net metering coming and want to position the District to be inside the program before changes occur.

## What is the Benefit?

- Public Entity gets a coupon to use on electricity consumption (financial benefit).
- Developer gets money from sale of electricity and retention of SRECs
- Land owner gets a lease payment on an asset that would otherwise just sit and depreciate
- The host Municipality gets property tax income. *Possibility, thru this deal, could be Acton.*

5

## What is the Risk?

- The risks in all of the proposals we have before us to consider differ. We are here to discuss what risks vs. reward the District should consider.
- Financial risks are similar with off-site solar and on-site solar.
- On-site solar presents an additional risk in that our physical property would host the structures for 20 years.
- Financial risk revolves around cost of electricity and how much electricity we consume.
- In all the scenarios the deals are structured to hedge our risk. 80% of consumption, indexed floor rates .08 cents, consultant has run sensitivity analysis.

6



## What is the Reward?


- Fixed Price off-site year one \$290,592 over 20 year term (under conservative sensitivity analysis) could be \$4,939,398. There is a risk in that the electricity market could over 20 years dip below our fixed price and the District would owe liquidated damages.
- Indexed (25% discount) Price year one generates \$207,978 over 20 year term (under conservative sensitivity analysis) could be \$4,361,106. **Very low floor rate essentially removes all risk.**
- On-site financial reward is indexed at a greater discount (35%) but total revenue would be less due to less production. Also risk associated with physically hosting assets.

7

## Next Steps?

- Meet with Omni and finalize the job site. Currently OMNI is offering 7 possibilities, including one in Acton.
- Determine which accounts to list on the schedule Z form allocating the consumption.
- Legal has already reviewed the agreement and suggested minor edits.
- Discuss mechanically how to handle the revenue with the Finance Department.
- Assuming a level of comfort exists, come back to the Committee and ask for a vote to authorize the District to enter into an agreement, possibly December 3, 2015.

8

	OMNI FIXED PRICE		OMNI INDEXED PRICE	
	Net Metering with 0% Annual Escalator	Net Metering with 1% Annual Escalator	Net Metering with 0% Annual Escalator	Net Metering with 1% Annual Escalator
<b>PROJECT OVERVIEW</b>				
Generation in Year 1	4,511,014	4,511,014	4,511,014	4,511,014
Generation over 20-Year Term	86,060,699	86,060,699	86,060,699	86,060,699
<b>PROJECT COSTS</b>				
Generation Price Year 1	\$0.1200	\$0.1200	\$0.1383	\$0.1383
Generation Price Year 20	\$0.1748	\$0.1748	\$0.1383	\$0.2228
Annual Escalator	2.0%	2.0%	0.0%	1.0%
Floor Rate	N/A	N/A	\$0.0800	\$0.0800
All-in Vendor Fee				
Year 1	\$541,322	\$541,322	\$623,935	\$623,935
Over 20 Yr Term	\$12,505,026	\$12,505,026	\$11,903,377	\$13,083,318
<b>PROJECT BENEFITS</b>				
Net Metering Credit Rate Assumption				
Year 1	\$0.18442	\$0.18442	\$0.18442	\$0.18442
Over 20 Yr Term	\$0.18442	\$0.22280	\$0.18442	\$0.22280
Illustrative Conservative Annual Escalator	0%	1%	0%	1%
Rate Tariff	A-9	A-9	A-9	A-9
Illustrative Credit Benefit				
Illustrative Net Metering Year 1	\$831,914	\$831,914	\$831,914	\$831,914
Illustrative Net Metering Over Term	\$15,871,170	\$17,444,423	\$15,871,170	\$17,444,423
<b>OVERALL NET SAVINGS TO TOWN FROM SOLAR PROJECTS</b>				
Net Metering				
Year 1	\$290,592	\$290,592	\$207,978	\$207,978
Over 20 Yr Term	\$3,366,144	\$4,939,398	\$3,967,792	\$4,361,106
<b>FIRST YEAR IMPACT OF SAVINGS ON OPERATING BUDGET</b>				
Fiscal Year 2014 Electricity Cost		\$900,946		
Year 1	32.25%	32.25%	23.08%	23.08%
Approx Over 20 Yr Term	18.68%	27.41%	22.02%	24.20%

## Questions?



### On-Site Solar Proposal





**Acton-Boxborough Regional School District**

16 Charter Road Acton, MA 01720

978-264-4700 fax: 978-264-3340

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

**JD Head**

*Director of Facilities and Transportation*

TO: Glenn Brand, Superintendent of Schools

FROM: JD Head, Director of Facilities and Transportation

DATE: 11/17/15

RE: **Opportunity for Solar Net Metering Revenue**

The purpose of this memo is to give the Acton-Boxborough Regional School Committee a first look at an opportunity to generate revenue by way of a solar net metering agreement. Please see the attached memo from Beth Greenblatt of Beacon Integrated Solutions, a consultant who has been working in conjunction with my Department on this project.

Because the Greenblatt memo is full of specific technical data, I am writing this memo to offer some background information related to why we are bringing this project to the School Committee now. As a District we have enjoyed a very favorable electricity contract negotiated by the facilities department from 12/1/2012 thru 12/1/2015. The electricity supply pricing under the current agreement is set at .06165 cents per kilowatt-hour. Our new contract starting 12/1/2015 and going thru 12/1/2016 raises that supply price to .07922 cents per kilowatt-hour. What this means for the District is that, based on last year's consumption, our electrical utility cost will increase by approximately \$160,000 over the next 12 months. The facilities department has been preparing for this increase in the budget process, by reducing consumption (down 29% since 2009), and by looking for creative clean energy opportunities. This net metering proposal would fall into the opportunities category. If our District decides to entertain an agreement like the one before us now, we will have the opportunity to generate approximately \$200,000 in revenue year 1 and approximately \$4,000,000 total over the 20 year term of the agreement. Our hope is that this opportunity will help offset the rising electrical rate prices that are hitting, and will continue to hit, the District.

Our goal is that by bringing this information to the School Committee this week, the Committee would be willing to vote to enter into an agreement at the 12/3/15 meeting. I look forward to the opportunity to discuss this with the Committee on 11/19/15.

Best Regards,

JD Head

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*



P.O. Box 320325  
Boston, MA 02132  
Voice: 617•469•2172  
eFax: 617•419•1163

## Memo

To: John David Head and Kate Crosby  
From: Beth Greenblatt  
Date: November 12, 2015  
Re: Review and Analysis of Omni-Navitas Holdings LLC Proposal for the Sale of Net Metering Credits

---

The Acton-Boxborough Regional School District (“ABRSD”) engaged Beacon Integrated Solutions (“Beacon”) under an Owner’s Agent Technical Services Support grant for the provision of solar photovoltaic systems and the purchase of net metering credits.

As a firm that represents many municipalities and regional school districts, Beacon is regularly approached by solar energy developers with offers to sell net metering credits from solar energy projects. As ABRSD is aware, solar energy projects that are built in remote locations provide solar generated electricity to local utilities for the benefit of contracted entities. The local utility monetizes the generation based on the net metering tariff and applies a financial credit on utility bills of the contracted entity. This is called virtual net metering.

### **Background:**

Beacon supported the ABRSD in issuing a competitive procurement for virtual net metering credits under M.G.L. c. 30B. At the time of the procurement there were few project opportunities available behind Eversource Energy’s distribution system in the northeast load zone. As a result, ABRSD received only one qualified proposal. After conducting due diligence on the proposal, it was determined that the offer was less economic than desired.

Subsequently, ABRSD considered the potential of siting solar photovoltaic systems on property owned by ABRSD, specifically rooftops and parking lots. Beacon prepared a competitive procurement for the design, construction, finance, ownership and operations of solar photovoltaic systems for rooftop and canopy installations. The Request for Proposals, to be issued under M.G.L. c. 25A, has not yet been released.

Since issuing the original Request for Proposals for net metering credits, the solar photovoltaic market in Eversource Energy’s service territory in the northeast load zone has enjoyed significant growth. In addition, SunEdison, a private firm selected through an aggregation procurement conducted by PowerOptions, has recently approached ABRSD to develop, construct, own and operate solar photovoltaic systems on ABRSD-owned property. This memo specifically addresses the merits and opportunities for offer brought to Beacon for the benefit of ABRSD by a qualified solar firm in the process of construction a dozen projects in the Eversource Energy northeast load zone. Beacon was also asked to review the SunEdison proposal and opine as to its economic merits.

## **1. SunEdison Project:**

It is Beacon's understanding that SunEdison is able to offer public entities full scope development, construction and ownership solutions for solar photovoltaic systems under an arrangement with PowerOptions. Under M.G.L. c. 164 § 137, PowerOptions was able to conduct a competitive procurement for solar photovoltaic installations for its membership. Beacon is not familiar with this statute or any such regulations that govern the statute. While it is assumed that the PowerOptions solar vendor SunEdison is able to simply negotiate a long-term lease/license and net metering purchase agreement, Beacon strongly recommends ABRSD seek counsel guidance.

Notwithstanding the above, Beacon understands that SunEdison has offered to design, install, own and operate several solar photovoltaic system as rooftops and carport installations. SunEdison has offered two price options, a fixed and indexed option. Due to restrictions on available rooftop and parking lot areas, the systems will only be able to accommodate upwards of 600 kilowatts, only a small portion of ABRSD electric capacity requirements. Beacon understands that the economic offer to construct, own and operate several solar photovoltaic systems on the ABRSD campus by SunEdison is attractive. Despite the limitation on size, the systems could provide a greater unit benefit for a smaller number of units than a system not constructed on ABRSD property.

Beacon notes that many of its clients have engaged qualified solar firms to design, construct, own and operate solar photovoltaic systems on school rooftops and parking lots. In addition to the environmental, educational and economic benefits of such systems, Beacon's clients considered the operations and maintenance impacts and potential risks such systems presented. While contractual provisions would allow ABRSD to properly maintain and repair roof and parking surfaces over the twenty (20) year term of the agreement, financial consideration would be required as a liquidated damage for lost revenues if such repairs were completed over a prolonged period. Beacon generally recommends that its clients consider rooftop installations only in circumstances where the roofs are less than ten (10) years old and are in very good condition.

Finally, last winter's heavy snowfall has highlighted additional risk with rooftop installations. Despite the requirement to ensure that there is sufficient additional structural capacity to accommodate solar photovoltaic systems under normal snow load conditions, Beacon's clients are now requiring solar firms to contractually support any roof clearing requirements imposed by local code officials.

Despite the potential risks associated with rooftop and carport systems, on-site installations, particularly located at educational facilities, can provide measureable benefits beyond the financial savings. These systems can be more directly integrated into the educational curriculum and provide long-term learning opportunities.

The balance of this memorandum addresses the virtual net metering proposal offered by Omni-Navitas Holdings LLC.

## **2. Omni-Navitas Holdings LLC Project:**

Several weeks ago, Beacon was approached by a reputable solar developer with an offer for ABRSD to purchase net metering credits from one or more of twelve facilities located in the communities of Acton, Woburn, Natick, Waltham, Framingham, Lexington, Needham and Burlington. Each of these

projects will entail the construction of solar photovoltaic systems on either rooftops or canopy/carports on privately owned commercial property.

Omni-Navitas Holdings LLC is offering to ABRSD both a fixed and indexed offer. The fixed offer for the purchase of net metering credits is \$0.12/kWh with a 2% annual escalator. The indexed offer is a 25% discount off of the then-current net metering credit tariff rate with a floor rate of \$0.08/kWh. While the fixed rate provides increased front-end benefits, the indexed rate virtually eliminates any risk that the payment for net metering credits exceeds the benefits from net metering.

### **Solar Project Financial Benefits:**

A summary of the financial benefits for the solar generation and resulting net metering credits required by ABRSD has been prepared by Beacon and is presented below. Please note that the analysis relies on the assumptions listed below, which are based on actual values, as indicated, as well as conservative projections for net metering benefits. Beacon further provided four financial scenarios, which rely on the following financial assumptions:

- Scenario 1: Fixed price offer escalating at 2% per year and the value of Net Metering credits (i.e., benefits from Eversource Energy) is held constant over twenty (20) years. This is an improbable scenario, and highly conservative.
- Scenario 2: Fixed price offer escalating at 2% per year and the value of Net Metering credits escalates at 1% per year.
- Scenario 3: Indexed price offer escalating at the rate of Net Metering. The value of Net Metering credits is held constant over twenty (20) years. This is an improbable scenario, and highly conservative.
- Scenario 4: Indexed price offer escalating at the rate of Net Metering. The value of Net Metering credits escalates at 1% per year.

In Beacon's analysis, approximately fifty-percent of the Net Metering credit rate represents the Basic Service Charge (energy supply) and the other fifty-percent represent the allowable Delivery Charges. The Eversource Energy Basic Service Charges will adjust every six months. Beacon's analysis relies on an average annual rate as discussed below using conservative values. The following summarizes the assumptions Beacon relied on in our analysis:


### **Beacon Assumptions:**

- Net metering credit rate is calculated based on the current four rate decrements and values under the A-9 Eversource Energy tariff, including Basic Service Charge, Transmission, Transition and Distribution charges. Relying on the current net metering tariff values of the A-9 rate, the analysis uses a total net metering rate of \$0.18442/kWh which is comprised of the average Basic Service Charge for a 12-month period of \$0.09042/kWh plus the net metering allowable Delivery Charges (Transmission, Transition and Distribution) of \$0.094/kWh.

Beacon notes that the Net Metering tariff value used in the analysis provides a conservative assessment of Net Metering. For the Net Metering tariff value, Beacon used a Basic Service Charge of \$0.09042 per kilowatt-hour, which reflects an average value for the period January - December 2014. The Basic Service Charge for an A-9 rate for the January - June 2015 period was \$0.14501 per kilowatt-hour and for the July - December 2015 period is \$0.09868 per kilowatt-hour. The average Basic Service Charge

for calendar year 2015 is \$0.12185 per kilowatt-hour. The Basic Service values used by Beacon in its analysis is therefore highly conservative, but likely reflective of future market conditions. Any increases in Basic Service and/or Delivery charges will result in greater Net Metering benefits to ABRSD since ABRSD's benefits are triggered off of Eversource Energy's charges.

- The escalator for the Net metering tariff value has been set for illustrative purposes at 0% to reflect a **conservative** financial projection of benefits. Beacon conducted a sensitivity to present the potential increased benefits if market/utility energy prices escalate at 1% annually. Note that changing market/utility energy prices has no impact on Omni's pricing.
- ABRSD's electricity costs were calculated using actual delivered cost of electricity for FY 2014.
- To determine the approximate cost for electricity for traditional operational use over the 20-year term, Beacon used the above total cost for 2014 times 20 years. This value was compared against the 20-year benefit from the solar projects to provide an approximate percentage savings impact on the operating budget from the net metering agreement with Omni.
- The percentage impact of the Solar Photovoltaic projects on ABRSD's operating budget reflects the expected actual cost savings to ABRSD from the Omni projects. The overall benefits will fluctuate with a changing net metering credit rate value, which is regulated by the MA Department of Public Utilities.

	OMNI FIXED PRICE		OMNI INDEXED PRICE	
	Net Metering with 0% Annual Escalator	Net Metering with 1% Annual Escalator	Net Metering with 0% Annual Escalator	Net Metering with 1% Annual Escalator
<b>PROJECT OVERVIEW</b>				
Generation in Year 1	4,511,014	4,511,014	4,511,014	4,511,014
Generation over 20-Year Term	86,060,699	86,060,699	86,060,699	86,060,699
<b>PROJECT COSTS</b>				
Generation Price Year 1	\$0.1200	\$0.1200	\$0.1383	\$0.1383
Generation Price Year 20	\$0.1748	\$0.1748	\$0.1383	\$0.2228
Annual Escalator	2.0%	2.0%	0.0%	1.0%
Floor Rate	N/A	N/A	\$0.0800	\$0.0800
<b>All-in Vendor Fee</b>				
Year 1	\$541,322	\$541,322	\$623,935	\$623,935
Over 20 Yr Term	\$12,505,026	\$12,505,026	\$11,903,377	\$13,083,318
<b>PROJECT BENEFITS</b>				
<b>Net Metering Credit Rate Assumption</b>				
Year 1	\$0.18442	\$0.18442	\$0.18442	\$0.18442
Over 20 Yr Term	\$0.18442	\$0.22280	\$0.18442	\$0.22280
Illustrative Conservative Annual Escalator	0%	1%	0%	1%
Rate Tariff	A-9	A-9	A-9	A-9
<b>Illustrative Credit Benefit</b>				
Illustrative Net Metering Year 1	\$831,914	\$831,914	\$831,914	\$831,914
Illustrative Net Metering Over Term	\$15,871,170	\$17,444,423	\$15,871,170	\$17,444,423
<b>OVERALL NET SAVINGS TO TOWN FROM SOLAR PROJECTS</b>				
Net Metering				
Year 1	\$290,592	\$290,592	\$207,978	\$207,978
Over 20 Yr Term	\$3,366,144	\$4,939,398	\$3,967,792	\$4,361,106
<b>FIRST YEAR IMPACT OF SAVINGS ON OPERATING BUDGET</b>				
Fiscal Year 2014 Electricity Cost	\$900,946			
Year 1	32.25%	32.25%	23.08%	23.08%
Approx Over 20 Yr Term	18.68%	27.41%	22.02%	24.20%



File: IC/ICA

**SCHOOL YEAR/SCHOOL CALENDAR**

The school calendar for the ensuing year will be prepared by the Superintendent and submitted to the School Committee for approval annually. The number of days or instructional hours scheduled for the school year will be determined in accordance with the following standards set by the Acton-Boxborough Regional School Committee.

The schools shall ensure that every student is scheduled to receive sufficient learning time to receive an appropriate public school education.

For the information of staff, students, and parents, the calendar will set forth the days schools will be in session; holidays and vacation periods; in-service days; and parent conferences.

LEGAL REFS.: M.G.L. 4:7; 15:1G; 71:1; 71:4; 71:4A; 71:73; 136:12  
Board of Education Regulations for School Year and School Day,  
effective 9/1/75  
Board of Education, Student Learning Time Regulations  
603 CMR 27.00, Adopted 12/20/94

Approved: 3/20/14



**Acton-Boxborough Regional School District**

**Personnel Office**

16 Charter Road Acton, MA 01720  
978-264-4700 x 3209 fax: 978-264-3340  
[www.abschools.org](http://www.abschools.org)

9.2

**Marie Altieri**

*Director of Personnel and Administrative Services*

To: Acton-Boxborough Regional School Committee  
From: Marie Altieri, Director of Personnel and Administrative Services  
Date: October 29, 2015  
Re: Calendar Survey and Recommendation

Please see the attached calendar survey and results. 453 staff members responded, including 311 teachers. We included a description of this year's calendar, and four options for the start of school. Labor Day next year is on Monday, September 5.

Almost 80% thought that having two staff days before school started worked well. Of the four options, there was a clear preference (70%) to have the staff days on Monday August 29 and Tuesday August 30 with students starting on Wednesday, August 31. The 70% breaks down into 44% who prefer to have the Friday before Labor Day off, and 25% prefer to have school on the Friday before Labor Day. Since the teachers' contract specifies that the Friday before Labor Day is a no school day, we will need to recommend a calendar with no school on the Friday before Labor Day.

Based on these results, we are bringing forward a recommended calendar (attached) with Staff Opening Day and Professional Day on Monday, August 29 and Tuesday August 30. Students in grades K-6, 7 & 9 would start on Wednesday, August 31. Students in grades 8, 10, 11 & 12 would start school on Thursday September 1. Friday September 2 would be a no school day.

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

# School Opening and Calendar Survey 2015

## School Opening and Calendar Survey

The teachers' contract now specifies two professional days. We schedule one of them every year on election day in November. This year we scheduled the second professional day as a school-based day before school started. We would like your feedback about the scheduling of that day as well as possible ways to schedule the start of school next year.

The schedule for the opening of school this year included:

Monday August 31 School-Based Professional Day

Tuesday Sept 1 Superintendent's welcome & School meetings

Wednesday Sept 2 1st Day for students Grades K-6, 7 & 9

Thursday Sept 3 1st Day for students grades 8 & 10-12 and early release for elementary

Friday Sept 4 No School

Friday Sept 7 No School - Labor Day

Next year, Labor Day is on Monday September 5, 2016.

### 1. It worked well to have two staff days before school started

Strongly Agree

Agree

Disagree

Strongly Disagree

N/A

Comment

### 2. One of our professional days will continue to be in November. When would you prefer to have the second professional day?

Before School Starts

Late Winter

Comment

**3. Labor Day next year is Mon Sept. 5. Which schedule would you prefer for next year? Please rate your 1st, 2nd, 3rd and 4th choice.**

Staff Days: Wed Aug 31/Thu Sept 1; Students Start: Tues Sept 6/Wed Sept 7; Last Day: June 19-26

Staff Days: Mon Aug 29/Tues Aug 30; Students Start: Wed Aug 31/Thu Sept 1; No School Fri Sept 2; Last Day: June 15 - 22

Staff Days: Mon Aug 29/Tues Aug 30; Students Start: Wed Aug 31/Thu Sept 1; School is held Fri Sept 2; Last Day: June 14-21

Staff Days Wed Aug 24/Thu Aug 25; Students Start Mon Aug 29/Tues Aug 30; No School Fri Sept 2; Last Day: June 13-20

**4. Comments:**

**5. My position is:**

Teacher, Counselor, Nurse, or other certified staff member

Administrator

Support Staff member

**6. At which school do you work?**

Preschool

Gates

ABRHS

Blanchard

McT

Central Office/District-Wide

Conant

Merriam

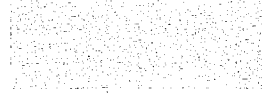
Douglas

R. J. Grey

### Q1 It worked well to have two staff days before school started

Answered: 453 Skipped: 6

(no label)



0 1 2 3 4 5 6 7 8 9 10

	Strongly Agree	Agree	Disagree	Strongly Disagree	N/A	Total	Weighted Average
(no label)	29.80%	48.34%	11.26%	5.52%	5.08%	453	3.08
	135	219	51	25	23		

### Q2 One of our professional days will continue to be in November. When would you prefer to have the second professional day?

Answered: 437 Skipped: 22

Before School Starts



Late Winter



0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%

**Answer Choices**

**Responses**

Before School Starts

45.54%

199

Late Winter

54.92%

240

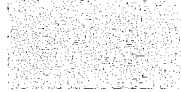
Total Respondents: 437

### Q3 Labor Day next year is Mon Sept. 5.

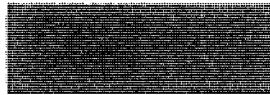
**Which schedule would you prefer for next year? Please rate your 1st, 2nd, 3rd and 4th choice.**

Answered: 455 Skipped: 4

Staff Days:  
Wed Aug 31/T...



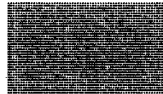
Staff Days:  
Mon Aug 29/T...



Staff Days:  
Mon Aug 29/T...



Staff Days Wed  
Aug 24/Thu A...



0 1 2 3 4 5 6 7 8 9 10

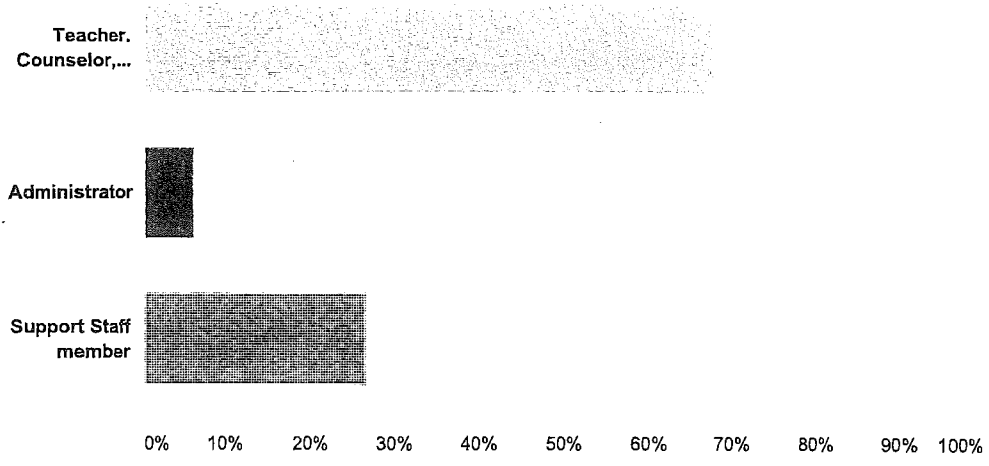
	1	2	3	4	Total	Score
Staff Days: Wed Aug 31/Thu Sept 1; Students Start: Tues Sept 6/Wed Sept 7; Last Day: June 19-26	18.63%	17.22%	28.07%	36.08%	424	2.18
Staff Days: Mon Aug 29/Tues Aug 30; Students Start: Wed Aug 31/Thu Sept 1; No School Fri Sept 2; Last Day: June 15 - 22	44.47%	35.62%	18.58%	1.33%	452	3.23
Staff Days: Mon Aug 29/Tues Aug 30; Students Start: Wed Aug 31/Thu Sept 1; School is held Fri Sept 2; Last Day: June 14-21	24.77%	36.04%	32.88%	6.31%	444	2.79
Staff Days Wed Aug 24/Thu Aug 25; Students Start Mon Aug 29/Tues Aug 30; No School Fri Sept 2; Last Day: June 13-20	15.50%	13.08%	22.52%	48.91%	413	1.95

**Q4 Comments:**

Answered: 48 Skipped: 411

**Q5 My position is:**

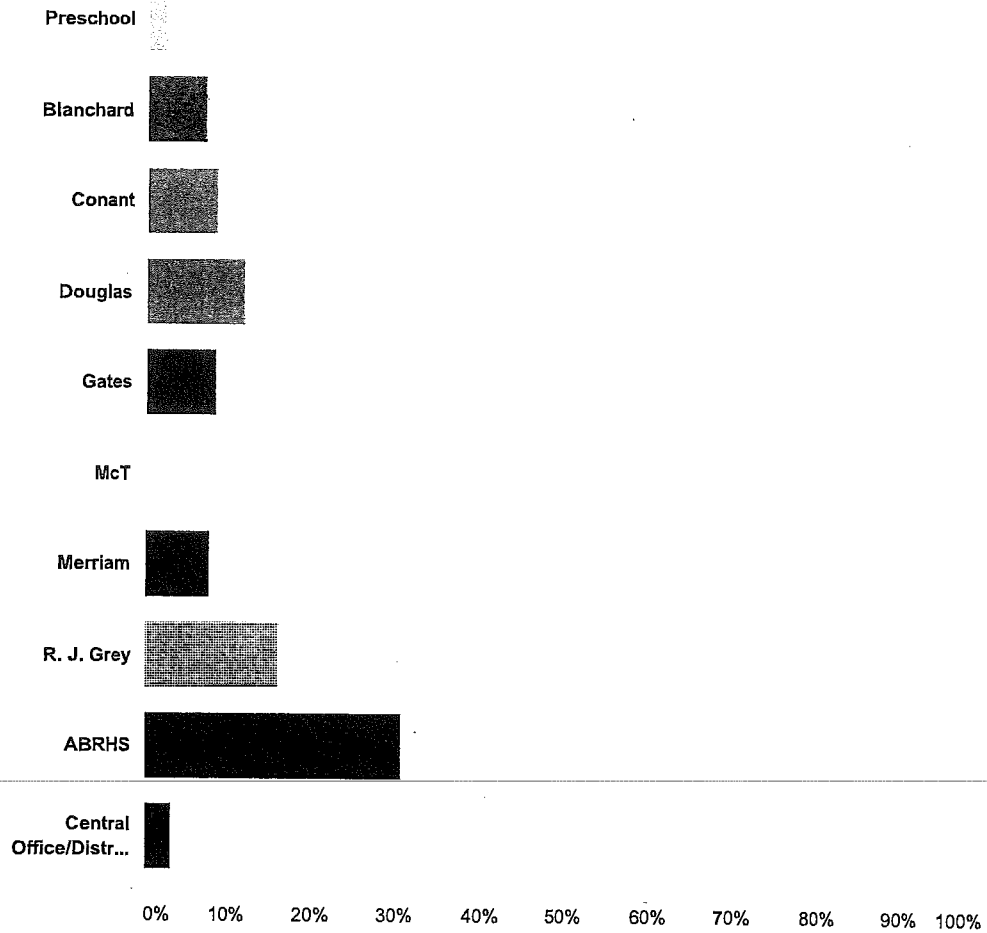
Answered: 457 Skipped: 2



Answer Choices	Responses	Count
Teacher, Counselor, Nurse, or other certified staff member	68.05%	311
Administrator	6.35%	29
Support Staff member	26.70%	122
<b>Total Respondents: 457</b>		

### Q6 At which school do you work?

Answered: 454 Skipped: 5



**Answer Choices**

**Responses**

Preschool	2.42%	11
Blanchard	7.27%	33
Conant	8.81%	40
Douglas	12.11%	55
Gates	8.59%	39
McT	9.47%	43
Merriam	7.71%	35
R. J. Grey	16.30%	74
ABRHS	30.62%	139
Central Office/District-Wide	3.30%	15

**Total Respondents: 454**



Acton-Boxborough Regional School District  
**DRAFT SCHOOL CALENDAR, 2016-2017**  
**Bold Underlined Dates = No School Days**

**Elementary Schools will dismiss early on the 1<sup>st</sup> and 3<sup>rd</sup> Thursdays of each month.**

Month	M	T	W	T	F	Notes	Jan.	M	T	W	T	F	Notes
Sept.			<b>31</b>	1	<b>2</b>	Teachers' mtgs. – Aug 29 & 30		<b>2</b>	3	4	5	6	Schools Open - Jan 3
	<b>5</b>	6	7	8	9	Schools Open – Aug 31		9	10	11	12	13	JH Early Dis for confs – TBD
	12	13	14	15	16	Labor Day – Sept 2 & 5		<b>16</b>	17	18	19	20	Martin Luther King Day - Jan 16
	19	20	21	22	23			23	24	25	26	27	Kindergarten Change-over - TBD
	26	27	28	29	30	School Days - 21		30	31				School Days - 20
Oct.						*K-12 Early Dis for prof dev – TBD	Feb.						*K-12 Early Dis for prof dev – TBD
	<b>3</b>	4	5	6	7	Rosh Hashanah – Oct 3				1	2	3	Presidents' Day - Feb 20
	<b>10</b>	11	<b>12</b>	13	14	Columbus Day – Oct 10		6	7	8	9	10	Winter Recess - Feb 20-24
	17	18	19	20	21	Yom Kippur – Oct 12		13	14	15	16	17	School Days – 15
	24	25	26	27	28	Elem Early Dis for confs – TBD		<b>20</b>	<b>21</b>	<b>22</b>	<b>23</b>	<b>24</b>	
	31					School Days - 18		27	28				
Nov.						Prof. Day - Nov. 8 (no school/students)	Mar.						HS Late Start <b>only for students NOT taking MCAS</b> -March TBD
		1	2	3	4	Veterans Day - Nov 11				1	2	3	
	7	<b>8</b>	9	10	<b>11</b>	Half Day – Nov 23		6	7	8	9	10	
	14	15	16	17	18	Thanksgiving Recess - Nov 24 & 25		13	14	15	16	17	School Days - 23
	21	22	23	<b>24</b>	<b>25</b>	School Days - 18		20	21	22	23	24	
	28	29	30					27	28	29	30	31	
Dec.						*Elem Early Dis for Prof Dev – TBD	Apr.						*K-12 Early Dis for prof dev – TBD
				1	2	Jr High Early Dis for Conf –TBD				3	4	5	Good Friday – April 14
	5	6	7	8	9	Winter Recess - Dec. 26 – Jan 2		10	11	12	13	<b>14</b>	Patriots Day – Apr 17
	12	13	14	15	16	School Days - 17		<b>17</b>	<b>18</b>	<b>19</b>	<b>20</b>	<b>21</b>	Spring Recess - Apr 17-21
	19	20	21	22	23			24	25	26	27	28	School Days - 14
	<b>26</b>	<b>27</b>	<b>28</b>	<b>29</b>	<b>30</b>		May						HS Late Start <b>only for students NOT taking MCAS</b> -May TBD
								1	2	3	4	5	
								8	9	10	11	12	Memorial Day - May 29
								15	16	17	18	19	School Days - 22
								22	23	24	25	26	
								<b>29</b>	30	31			
							June						Graduation – June 2
											1	2	Last day – June 16 (no snow days)
								5	6	7	8	9	(June 23 if 5 snow days used)
								12	13	14	15	<b>16</b>	School Days - 12
								19	20	21	22	23	
								26	27	28	29	30	

Note: See attached DESE list for some major religious holidays.  
 \* Professional Learning for Staff Early Dismiss: Oct , Dec (elem only), Feb , Apr

No School and Delayed Opening Announcements air on TV Channels 4, 5 and 7 and radio stations WBZ and WEIM. See postings at <http://abschools.org>

Acton Town Meeting begins April X, 2017. Boxborough Meeting begins May X, 2017.

Acton-Boxborough Regional School Committee Meetings are held twice a month. See <http://www.abschools.org/school-committee> for more information.

**Total Days = 180**

October 2015						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

## Holiday Observances in Massachusetts

(Statewide Legal Holidays are in Bold)

This list includes statewide legal holidays (in **bold**) and some major religious holidays. It does not include all religious holidays observed by every faith. State and federal law require schools to make reasonable accommodation to the religious needs of students and employees. For information on other religious holidays observed by members of religions represented in your school community, please see [Interfaith Calendar website](#) or contact local clergy. School vacations are determined by school districts and charter schools. Please contact the local school administration office for details. Contact information can be found at [Massachusetts Schools and Districts](#).

	2014-2015 School Yr.	2015-2016 School Yr.	2016-2017 School Yr.
Eid al-Fitr**	Tues., July 29	Sat., July 18	Thurs., July 7
<b>Labor Day</b>	<b>Mon., Sept. 1</b>	<b>Mon., Sept. 7</b>	<b>Mon., Sept. 5</b>
Rosh Hashanah*	Sept. 25-Sept. 26	Sept. 14-Sept. 15	Oct. 3-Oct. 4
Yom Kippur*	Sat., Oct. 4	Wed., Sept. 23	Wed., Oct. 12
Sukkot*	Thurs., Oct. 9	Mon., Sept. 28	Mon., Oct. 17
<b>Columbus Day</b>	<b>Mon., Oct. 13</b>	<b>Mon., Oct. 12</b>	<b>Mon., Oct. 10</b>
Ramadan**	June 29-July 28	June 18-July 17	June 6-July 5
<b>Veterans' Day</b>	<b>Tues., Nov. 11</b>	<b>Wed., Nov. 11</b>	<b>Fri., Nov. 11</b>
Diwali	Thurs., Oct. 23	Wed., Nov. 11	Sun., Oct. 30
<b>Thanksgiving</b>	<b>Thurs., Nov. 27</b>	<b>Thurs., Nov. 26</b>	<b>Thurs., Nov. 24</b>
Eid al-Adha**	Sun., Oct. 5	Wed., Sept. 23	Tues., Sept. 13
Chanukah*	Wed., Dec. 17	Mon., Dec. 7	Sun., Dec. 25
<b>Christmas Day</b>	<b>Thurs., Dec. 25</b>	<b>Fri., Dec. 25</b>	<b>Sun. Dec. 25</b>
Kwanzaa	Fri., Dec. 26	Sat., Dec. 26	Mon., Dec. 26
<b>New Year's Day</b>	<b>Thurs., Jan. 1</b>	<b>Fri., Jan. 1</b>	<b>Sun., Jan. 1</b>
<b>Martin Luther King, Jr. Day</b>	<b>Mon., Jan. 19</b>	<b>Mon., Jan. 18</b>	<b>Mon., Jan. 16</b>
<b>Presidents' Day</b>	<b>Mon., Feb. 16</b>	<b>Mon., Feb. 15</b>	<b>Mon., Feb. 20</b>
Chinese New Year	Thurs., Feb. 19	Tues., Mar. 8	Sat., Jan. 28
Ash Wednesday	Wed., Feb. 18	Wed., Feb 10	Wed., Mar. 1
Vernal Equinox	Fri., Mar. 20	Sun., Mar. 20	Mon., Mar. 20
Evacuation Day***	Tues., Mar. 17	Thurs., Mar. 17	Fri., Mar. 17
Palm Sunday	Sun. Mar. 29	Sun., Mar. 20	Sun., April 9
Passover *	Sat. April 4	Sat., April 23	Mon., April 10
Good Friday	Fri., April 3	Fri., Mar. 25	Fri., April 14
Easter	Sun., April 5	Sun., Mar. 27	Sun., April 16
Orthodox Good Friday	Fri., April 10	Fri., April 29	Fri., April 14
Orthodox Easter	Sun., April 12	Sun., May 1	Sun., April 16
<b>Patriots' Day</b>	<b>Mon., April 20</b>	<b>Mon., April 18</b>	<b>Mon., April 17</b>
<b>Memorial Day</b>	<b>Mon., May 25</b>	<b>Mon., May 30</b>	<b>Mon., May 29</b>

Shavuot*	Sun., May 24	Sun., June 12	Tues., May 30
Bunker Hill Day****	Wed., June 17	Fri., June 17	Sat., June 17
<b>Independence Day</b>	<b>Sat., July 4</b>	<b>Mon., July 4</b>	<b>Tues., July 4</b>

\*  
All Jewish holidays begin at sundown on the evening prior to the day of the holiday. In addition to dates noted, observant Jews celebrate the second, seventh and eighth days of Passover; the second, eighth and ninth days of Sukkot; and two days of Shavuot. Mass. Lawyers Diary and Manual.

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Due to the lunar calendar, these are only approximate dates.

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Previous legal holiday in Suffolk County

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*Massachusetts Department of  
Elementary & Secondary Education*



**Acton-Boxborough Regional School District**

16 Charter Road  
Acton, MA 01720  
978-264-4700 www.abschools.org

10.1

TO: Superintendent Glenn Brand  
ABRSD School Committee  
FROM: Clare Jeannotte, Director of Finance *Clare*  
RE: FY'16 Financial Status as of October 31, 2015  
DATE: November 16, 2015

Attached please find the following reports for the District as of October 31, 2015:

FY16 Appropriated Budget v. Actual (Expenditures and Revenues)  
FY16 Special Revenue, Revolving and Gift Funds

**Appropriated budget:**

**Revenues:**

Overall, revenues are tracking fine against budgeted \$79,542,356, with monthly Ch. 70 and associated state accounts representing 1/3 of budget. Assessments and reimbursements for Charter School, Special Education, and Regional Bonus Aid and Regional transportation will not begin until December, consistent with the State payment schedule. The District has received \$33,786 through October 31<sup>st</sup> of unbudgeted revenues, representing Medicaid reimbursement (\$25,363) Interest income (\$5,597) and other miscellaneous \$2,826.

Data posted by DESE shows that our Net Charter Assessment for FY'16 may be slightly favorable to budget, at \$354,425 compared to \$403,978 budget. This is based upon 31.0 FTE students enrolled and may change throughout the year.

**Expenditures:**

**Overview:**

As of October 31, 85.2% of the budgeted expenditures are expended or encumbered. Difficult areas emerging at this early point in the fiscal Special Ed Transportation (exceeding budget \$123,158) and Tuitions (exceeding budget \$69,458, after assumed Circuit breaker offset). The budget assumed using \$2,353,596 of circuit breaker funds for FY16. We were able to carry forward \$331,453 of FY'15 Circuit Breaker to FY'16. In addition, if Legal expense is at a similar level to FY15 (\$257,828), the budget of \$150,000 will become inadequate.

**Salaries & Stipends:**

Early projections indicate that we may be favorable to budget. While projections and "standard" payroll levels have settled down by the second month of the school year, changes can occur as the year goes on not only due to staffing changes, but also overtime management and requirements for substitute staffing.

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*



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It is helpful that the "vacancy factor" in this budget was set at \$275,000, down from the unachievable target in the FY15 budget of \$425,000.

All Fringes:

Health insurance for both Retirees and Actives are currently projecting favorable to budget. We are reviewing the enrollment and rate assumptions for both budget and actual to further analyze. The OPEB contribution of \$700,000 and MCRS assessment of \$1,961,424 have been funded.

Capital Outlay:

The budget is 74.4% spent/encumbered at October 31. Projects undertaken in this account include summer preparations for the start of the school year (tile replacements at McCarthy Towne and Conant, carpet replacement, new restroom partitions at Gates, and the wireless access point project at the High School.

Maintenance, Building & Grounds:

Similar to capital outlay above, much of this work occurs in the summer in preparation for the school year, and reflects the 58.8% spent/encumbered at October 31<sup>st</sup>. In addition to normal summer building maintenance, the high school pool ceiling was painted, and an emergency Blanchard HVAC repair was implemented.

Other, Legal Services:

The combined budget of \$150,000, increased from \$128,650 budgeted in FY'15, is for standard levels of special education and general legal services. The current balance reflects a full encumbrance at budget levels for special education, but no encumbrance for general services. Based upon current matters, we anticipate this account may run over budget. This will evolve.

Student Transportation:

The largest expense here is the annual bus lease payment, comprising \$433K of the \$612K spent through October. This explains why 70% is spent already. Fuel costs per gallon are down from the prior year.

Transportation (Special Ed):

Special education transportation, consisting of the fixed rate CASE Collaborative assessment and special contract services, is currently encumbered to run over budget approximately \$123,000 due to more medically fragile students with specialized transportation requirements than anticipated when the budget was built.

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**Special Education out of district tuitions:**

The budget for this area is developed based on known caseloads nearly a year prior to the actuals. It is also shown net of amounts anticipated for "Circuit Breaker" reimbursement from the State, also calculated quite early in the process, and assigned an estimated reimbursement rate.

This year, we are seeing projected tuitions, before Circuit Breaker is applied, of \$7.7 million, compared to a budget of \$7.6 million. Circuit breaker assumed for the budget of \$2,353,596 is scheduled to come in only \$15,133 higher, at \$2,368,729 (73% reimbursement on the net claim of spending above 4x foundation for 84 eligible students). On a net basis this is resulting in an unfavorable projection of \$79.6K. I am continuing to meet monthly to update this important budget area with the Pupil Services department.

**Special Revenue Funds:**

Special revenue fund balances are on a cash basis. Accounts showing a deficit balance at 10/31 are due to timing of receipts and not a concern.

**Other Updates:**

FY'16 Grant revenues awarded from State and Federal sources of \$1,483,873 are down slightly from FY'15 \$1,494,654. A list is attached.

# ACTON / BOXBOROUGH REGIONAL SCHOOLS



## REVENUE BUDGET V ACTUAL 10/31/15 CURRENT YEAR ONLY

FOR 2016 99

JOURNAL DETAIL 2016 1 TO 2016 4

	ORIGINAL ESTIM REV	ESTIM REV ADJSTMTS	REVISED EST REV	ACTUAL YTD REVENUE	REMAINING REVENUE	PCT COLL
<b>1000 GENERAL FUND</b>						
45402 MEDICAID REIMBURSEMENT	0	0	0	-25,363.28	25,363.28	100.0%
46801 AID - CHAPTER 70	0	-14,393,376	-14,393,376	-4,797,692.00	-9,595,684.00	33.3%
46804 ASSESSMENT - SCHOOL CHOICE	0	103,099	103,099	34,496.00	68,603.00	33.5%
46805 ASSESSMENT - CHARTER SCHOOL	0	430,739	430,739	.00	430,739.00	.0%
46806 ASSESSMENT - SPECIAL EDUCATIO	0	12,675	12,675	.00	12,675.00	.0%
46807 TRANSPORTATION - PUPIL	0	-1,266,283	-1,266,283	.00	-1,266,283.00	.0%
46809 REIMBURSEMENT - CHARTER SCHOO	0	-26,761	-26,761	.00	-26,761.00	.0%
46811 REGIONAL BONUS AID	0	-111,200	-111,200	.00	-111,200.00	.0%
47501 ASSESSMENT - RGNL - ACTON	0	-53,171,009	-53,171,009	-17,723,669.68	-35,447,339.32	33.3%
47502 ASSESSMENT - RGNL - BOXBOROUG	0	-11,120,240	-11,120,240	-3,706,746.68	-7,413,493.32	33.3%
48200 EARNINGS - ON INVESTMENTS	0	0	0	-5,597.83	5,597.83	100.0%
48403 REVENUE - MISCELLANEOUS	0	0	0	-2,826.28	2,826.28	100.0%
TOTAL GENERAL FUND	0	-79,542,356	-79,542,356	-26,227,399.75	-53,314,956.25	33.0%
TOTAL REVENUES	0	-79,542,356	-79,542,356	-26,227,399.75	-53,314,956.25	
GRAND TOTAL	0	-79,542,356	-79,542,356	-26,227,399.75	-53,314,956.25	33.0%

\*\* END OF REPORT - Generated by Clare Jeannotte \*\*

	<u>FY16 BUDGET.</u>
REVENUES - above	\$ 79,542,356
Voted E+D	200,000
Bond Amortization	7,526
Total Sources	<u>\$ 79,749,882</u>

## State and Federal Entitlement And Allocation Grants by District

District:

Fiscal Year:

### Acton-Boxborough-2016

Fund Code	Grant Name	Amount
298	Early Childhood Special Education Program Improvement	3,000.00
240	IDEA - Special Education Entitlement Grant	1,187,481.00
274	SPED Program Improvement Grant	44,528.00
305	Title I	152,240.00
180	Title III Formula	35,081.00
140	Title II-Part A	61,543.00
<b>District Total</b>		<b>1,483,873.00</b>

[View by Fund Code](#)

## State and Federal Entitlement And Allocation Grants by District

District:

Fiscal Year:

### Acton-Boxborough-2015

Fund Code	Grant Name	Amount
298	Early Childhood Special Education Program Improvement	8,000.00
240	IDEA 2015	1,201,508.00
274	SPED Program Improvement Grant	23,387.00
305	Title 1	168,702.00
180	Title III Formula	31,143.00
140	Title II-Part A	61,914.00
<b>District Total</b>		<b>1,494,654.00</b>

[View by Fund Code](#)



11/12/2015 18:19  
8399cjea

ACTON / BOXBOROUGH REGIONAL SCHOOLS  
EXPENSE BUDGET V ACTUAL 10/31/15  
CURRENT YEAR ONLY

P 1  
glytdbud

FOR 2016 04

	ORIGINAL APPROP	TRANFRS/ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED
01 SALARIES, TEACHING	33,078,855	0	33,078,855	6,799,376.54	25,437,237.70	842,240.76	97.5%
02 SALARIES, PRIN/A PRI	2,188,065	0	2,188,065	752,672.43	1,430,077.57	5,315.00	99.8%
03 SALARIES, CNTRL ADMN	1,068,125	0	1,068,125	367,501.33	709,565.49	-8,941.82	100.8%
04 SALARIES, SUPP STAFF	9,040,355	0	9,040,355	1,998,691.57	6,662,253.01	379,410.42	95.8%
05 SALARIES, ATHLETICS	520,643	0	520,643	111,593.40	194,059.25	214,990.35	58.7%
06 SALARIES, BUILDINGS	719,691	0	719,691	270,765.37	403,187.31	45,738.32	93.6%
07 SALARIES, CUSTODIAL	1,471,234	0	1,471,234	451,106.06	961,319.51	58,808.43	96.0%
08 SALARIES, HOME INSTR	20,000	0	20,000	.00	.00	20,000.00	.0%
09 SALARIES, MISC PS	1,499,675	0	1,499,675	457,564.73	856,521.16	185,589.11	87.6%
11 SALARIES, SUBS MISC	222,781	0	222,781	27,876.56	859.44	194,045.00	12.9%
12 SALARIES, SUBS INSTR	530,508	0	530,508	84,524.61	.00	445,983.39	15.9%
13 SALARIES, OVERTIME	242,855	0	242,855	68,231.38	.00	174,623.62	28.1%
14 STIPENDS, CURR/INSTR	168,283	0	168,283	54,740.56	37,044.44	76,498.00	54.5%
15 FRINGES, COURSE REIM	56,000	0	56,000	23,813.00	.00	32,187.00	42.5%
16 FRINGES, HLTH INSUR	8,343,695	0	8,343,695	3,169,342.62	.00	5,174,352.38	38.0%
17 FRINGES, H INSUR RET	924,241	0	924,241	306,510.25	.00	617,730.75	33.2%
18 FRINGES, LIF/DIS INS	38,000	0	38,000	12,153.40	.00	25,846.60	32.0%
19 FRINGES, UNEMPLYMNT	25,000	0	25,000	27,268.69	.00	-2,268.69	109.1%
20 FRINGES, WORKRS COMP	348,412	0	348,412	260,619.25	.00	87,792.75	74.8%
21 FRINGES, MCRS	1,961,424	0	1,961,424	1,961,424.00	.00	.00	100.0%
22 FRINGES, MEDICARE	846,064	0	846,064	183,722.70	.00	662,341.30	21.7%
23 CONTRIB OPEB TRUST F	700,000	0	700,000	700,000.00	.00	.00	100.0%
24 INSTRUCT SUPPLIES	1,116,075	0	1,116,075	447,798.61	220,343.76	447,932.63	59.9%
25 INSTRUCT TEXTBOOKS	278,710	0	278,710	85,665.24	40,535.84	152,508.92	45.3%
26 INSTRUCTIONAL, LBY	59,435	0	59,435	17,060.51	11,438.96	30,935.53	48.0%
27 OTHER, CAP OUTLAY	335,459	-5,000	330,459	135,039.93	110,823.02	84,596.05	74.4%
29 OTHER, DEBT SERVICE	1,920,743	0	1,920,743	393,546.25	.00	1,527,196.75	20.5%
30 OTHER, PROP/CASUALTY	106,369	0	106,369	106,326.00	.00	43.00	100.0%
31 OTHER, MAINT BLDG/GR	715,048	0	715,048	319,797.70	100,444.32	294,805.98	58.8%
32 OTHER, MAINT EQUIP	146,470	0	146,470	24,472.53	8,851.51	113,145.96	22.8%
34 OTHER, LEGAL SERVICE	150,000	0	150,000	22,352.26	59,900.00	67,747.74	54.8%
35 OTHER, ADMIN SUPP	808,198	5,000	813,198	395,430.18	111,382.46	306,385.36	62.3%
36 OTHER, ATHLETIC SUPP	53,666	0	53,666	24,935.20	.00	28,730.80	46.5%
37 OTHER, CUSTODL SUPP	157,984	0	157,984	90,983.27	27,158.04	39,842.69	74.8%
38 OTHER, SPED TRANSP	1,528,647	0	1,528,647	745,256.80	906,547.92	-123,157.72	108.1%
39 OTHER, STUDENT TRANS	938,300	0	938,300	611,994.58	47,206.07	279,099.35	70.3%
40 OTHER, TRAVEL/CONF	89,186	0	89,186	26,874.78	37,408.00	24,903.22	72.1%
41 OTHER, SPED TUITION/	5,269,951	0	5,269,951	1,753,998.35	5,939,006.88	-2,423,054.23	146.0%
42 OTHER, UTILITIES	1,630,499	0	1,630,499	238,540.19	.00	1,391,958.81	14.6%
43 OTHER, TELEPHONE	144,045	0	144,045	12,165.27	.00	131,879.73	8.4%
44 OTHER, SEWER	287,191	0	287,191	22,475.19	67,425.57	197,290.24	31.3%
GRAND TOTAL	79,749,882	0	79,749,882	23,564,211.29	44,380,597.23	11,805,073.48	85.2%

CC 41- OTHER, SPED TUITION: \*\* END OF REPORT - Generated by Clare Jeannotte \*\*  
 FY'16 CIRCUIT BREAKER - BUDGETED USE:  $\text{\textcircled{17}} <2,423,054>$   
 Adjusted net deficit  $\underline{\underline{<69,458>}}$

**ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT  
SPECIAL REVENUE, REVOLVING, AND GIFT FUNDS  
10/31/2015**

	Fund Balance 6/30/15	Encumbrance Reversal	Fund Balance 7/1/2015	Receipts	Expenses	CASH BAL
<b>LUNCH</b>						
3201 LUNCH	731,034.98	5.74	731,040.72	440,435.17	391,836.91	779,638.98
<b>DISTRICTWIDE</b>						
3353 DISTRICT WIDE GIFTS	1,273.47		1,273.47	0.00	0.00	1,273.47
<b>CURRICULUM</b>						
3318 PARENT INVOLVEMENT PROJECT	20,088.91		20,088.91	2,616.00	4,459.91	18,245.00
3323 CURRICULUM GIFT	229.51		229.51	500.00	0.00	729.51
3419 SCHOOL TO BUSINESS	0.00		0.00	300.00	0.00	300.00
<b>FINANCE</b>						
3401 SCHOOL CHOICE	180,965.18		180,965.18	87,087.00	55,666.30	212,385.88 *
3016 CIRCUIT BREAKER	331,453.00		331,453.00	592,182.00		923,635.00 *
3417 TELEPHONE REVOLVING	0.00	12,954.37	12,954.37	0.00	8,023.49	4,930.88
3501 INSURANCE REIMB	16,094.95	85.39	16,180.34	0.00	26,282.04	(10,101.70)
9901 TAILINGS	24,091.93		24,091.93		16,076.59	8,015.34
<b>FACILITIES</b>						
3322 ELM ST HOOPS	1,214.00		1,214.00	0.00	0.00	1,214.00
3324 SOLAR PANEL PROJECT	1,555.75		1,555.75	0.00	0.00	1,555.75
3328 NSTAR POWER DOWN PROJECT	13,479.07		13,479.07	0.00	178.21	13,300.86
3329 FRIENDS OF LOWER FIELDS	58,406.94		58,406.94	20,000.00	13,230.00	65,176.94
3342 WEST ACTON BOARDWALK	11,072.50		11,072.50	0.00	0.00	11,072.50
3418 TRANSPORTATION	0.00		0.00	1,981.50	1,220.74	760.76
3332 DAMON PLAYGROUND	855.15		855.15	0.00	0.00	855.15
<b>COMMUNITY EDUCATION</b>						
3402 COMMUNITY ED	728,556.05	237.93	728,793.98	969,066.22	893,719.42	804,140.78
3403 USE OF FACILITIES	0.00		0.00	88,836.12	97,596.44	(8,760.32)
3404 DRIVERS' ED	267,425.17		267,425.17	64,987.75	59,470.22	272,942.70

*A revision to reflect correct receipts through 10/31/15.  
C. Jutte  
11/19/15*

**ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT  
SPECIAL REVENUE, REVOLVING, AND GIFT FUNDS  
10/31/2015**

	Fund Balance 6/30/15	Encumbrance Reversal	Fund Balance 7/1/2015	Receipts	Expenses	CASH BAL
<b>PUPIL SERVICES/SPED</b>						
3427 BL INTEGRATED PRESCHOOL	32,713.75		32,713.75	0.00	0.00	32,713.75
3428 ODP REVOLVING	51,567.98	835.00	52,402.98	23,854.80	12,515.56	63,742.22
3429 AD INTEGRATED PRESCHOOL	100,301.72	148.70	100,450.42	91,973.26	68,845.87	123,577.81
<b>3326 MCC BIG YELLOW SCHOOL BUS</b>						
SENIOR HIGH	205.14		205.14	0.00	0.00	205.14
CONANT	650.00		650.00	0.00	0.00	650.00
DOUGLAS	278.75		278.75	0.00		278.75
GATES	104.30		104.30	0.00	0.00	104.30
MERRIAM	671.00		671.00	0.00		671.00
<b>3341 COMM ED ADK GIFT</b>						
BLANCHARD	0.00		0.00	0.00	0.00	0.00
CONANT	0.00		0.00	0.00	0.00	0.00
DOUGLAS	0.00		0.00	0.00	0.00	0.00
GATES	0.00		0.00	0.00	40.00	(40.00)
MCCARTHY TOWNE	0.00		0.00	0.00	0.00	0.00
MERRIAM	0.00		0.00	0.00	0.00	0.00
<b>3416 LIBRARY REVOLVING</b>						
SENIOR HIGH	2,918.54		2,918.54	0.00	0.00	2,918.54
JUNIOR HIGH	6,943.41		6,943.41	0.00	0.00	6,943.41
BLANCHARD	1,750.00		1,750.00	0.00	0.00	1,750.00
CONANT	624.96		624.96	0.00	750.00	(125.04)
DOUGLAS	1,482.72	256.52	1,739.24	0.00	997.88	741.36
GATES	3,782.36		3,782.36	23.00	0.00	3,805.36
MCCARTHY TOWNE	1,746.35		1,746.35	0.00	763.51	982.84
MERRIAM	1,186.56		1,186.56	0.00	0.00	1,186.56

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**ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT  
SPECIAL REVENUE, REVOLVING, AND GIFT FUNDS  
10/31/2015**

	Fund Balance 6/30/15	Encumbrance Reversal	Fund Balance 7/1/2015	Receipts	Expenses	CASH BAL
<b>SENIOR HIGH</b>						
3301 ATHLETIC GIFTS	4,000.00		4,000.00	97.50	0.00	4,097.50
3303 ABSAF:SH ATHLETICS	0.00		0.00	46,000.00	0.00	46,000.00
3405 ATHLETIC REVG	0.00		0.00	142,957.50	61,559.17	81,398.33
3302 ABSAF:SH PERFORMING ARTS	4,695.17		4,695.17	0.00	0.00	4,695.17
3306 SENIOR HIGH GIFTS	6,601.44		6,601.44	0.00	70.47	6,530.97
3308 SH GIFT:PTSO	6,062.99	100.00	6,162.99	0.00	1,132.26	5,030.73
3309 SH GIFT:OTHER	10,996.99		10,996.99	48.99	0.00	11,045.98
3313 ABSAF:SH EXTRACURRICULAR	3,298.11		3,298.11	16,000.00	722.28	18,575.83
3315 UNITED WAY GIFT	994.95		994.95	0.00	0.00	994.95
3319 SH: COMMUNITY SERVICE GIFTS	3,296.38		3,296.38	300.00	0.00	3,596.38
3320 SH: SPECTRUM	88.77		88.77	10.00	0.00	98.77
3321 AB FRIENDS OF DRAMA	25.00		25.00	0.00	0.00	25.00
3412 LOST BOOKS-SENIOR HIGH	23,744.26	561.00	24,305.26	3,228.00	627.95	26,905.31
3413 PARKING-SENIOR HIGH	8,549.36		8,549.36	46,920.00	17,440.13	38,029.23
3414 SUMMER SCHOOL TUITION	174,894.21	143.59	175,037.80	13,175.98	113,939.14	74,274.64
3415 PERFORMING ARTS REV	3,799.73		3,799.73	12,609.50	12,477.74	3,931.49
3420 EMPORIUM REVOLVING	10,052.23		10,052.23	23,313.70	34,591.98	(1,226.05)
3423 SH: PROSCENIUM CIRCUS	4,274.54		4,274.54	12,000.00	7,618.92	8,655.62
3424 SH:COUNSELING/TESTING	6,057.89		6,057.89	7,970.00	2,100.03	11,927.86
3425 SH CHORUS	3,307.01		3,307.01	0.00	2,314.99	992.02
<b>JUNIOR HIGH</b>						
3305 JUNIOR HIGH GIFTS	16,748.19		16,748.19	1,555.00	4,831.84	13,471.35
3312 ABSAF:JH EXTRACURRICULAR	864.26		864.26	5,990.00	346.68	6,507.58
3314 JOHN LORING MEMORIAL GIFT	4,647.82		4,647.82	0.79	0.00	4,648.61
3316 PROJECT WELLNESS JH	2,030.00		2,030.00	5,000.00	0.00	7,030.00
3317 EDFAAB GIFT - JH	274.38		274.38	0.00	0.00	274.38
3327 DRAGONFLY THEATER	10,932.14	7,155.00	18,087.14	0.00	4,900.44	13,186.70
3411 LOST BOOKS-JUNIOR HIGH	6,918.93		6,918.93	0.00	13.00	6,905.93
3421 JH STORE REVOLVING	485.54		485.54	10,901.00	10,015.65	1,370.89
3422 JH THEATER REVOLVING	1,660.29		1,660.29	2,500.00	615.25	3,545.04

**ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT  
SPECIAL REVENUE, REVOLVING, AND GIFT FUNDS  
10/31/2015**


	Fund Balance 6/30/15	Encumbrance Reversal	Fund Balance 7/1/2015	Receipts	Expenses	CASH BAL
<b>BLANCHARD</b>						
3348 BLANCHARD GIFTS	3,084.69		3,084.69	0.00	0.00	3,084.69
3408 BLANCHARD AM/PM XD	220,006.41	1,129.11	221,135.52	47,871.67	61,107.69	207,899.50
<b>CONANT</b>						
3334 CONANT PTO	1,501.13		1,501.13	0.00	4,049.39	(2,548.26)
3343 CONANT ENRICHMENT GIFT	109,422.39		109,422.39	51,720.38	50,961.41	110,181.36
3349 CONANT GIFTS	1,394.20		1,394.20	0.00	0.00	1,394.20
<b>DOUGLAS</b>						
3335 DOUGLAS PTO	7,754.87		7,754.87	0.00	11,167.41	(3,412.54)
3350 DOUGLAS GIFTS	701.74		701.74	0.00	0.00	701.74
3409 DOUG: DAWN/DUSK	105,964.97	84.05	106,049.02	76,185.75	95,756.17	86,478.60
<b>GATES</b>						
3336 GATES PTO	4,251.57		4,251.57	0.00	3,810.89	440.68
3339 GATES GIFTS	12,103.08		12,103.08	0.00	0.00	12,103.08
3344 GATES ENRICHMENT GIFT	15,348.02		15,348.02	54,560.80	0.00	69,908.82
<b>MCCARTHY TOWNE</b>						
3337 MCCARTHY PTO	4,959.18		4,959.18	0.00	15,831.82	(10,872.64)
3340 MCCARTHY TECHN	0.50		0.50	0.00	0.00	0.50
3345 MCT ENRICHMENT GIFT	36,571.28		36,571.28	62,017.19	0.00	98,588.47
3351 MCCARTHY TOWNE GIFTS	400.00		400.00	0.00	0.00	400.00
<b>MERRIAM</b>						
3338 MERRIAM PTO	12,807.71		12,807.71	0.00	19,813.54	(7,005.83)
3352 MERRIAM GIFTS	62.91		62.91	0.00	0.00	62.91
3410 MERRIAM AM/PM	143,153.20		143,153.20	43,084.50	41,839.75	144,397.95
2642 Merriam Handshake Project	0.00		0.00			0.00
<b>Total</b>	<b>3,593,512.53</b>	<b>23,696.40</b>	<b>3,617,208.93</b>	<b>3,069,861.07</b>	<b>2,231,329.08</b>	<b>4,455,740.92</b>

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**ACTON BOXBOROUGH REGIONAL SCHOOL DISTRICT  
SPECIAL REVENUE, REVOLVING, AND GIFT FUNDS  
10/31/2015**

	Fund Balance 6/30/15	Encumbrance Reversal	Fund Balance 7/1/2015	Receipts	Expenses	CASH BAL
<b>SCHOLARSHIPS</b>						
5003 SCH:A B JAMBOREE	2,757.97		2,757.97	0.35	0.00	2,758.32
5004 SCH:KATHERINE KINSLEY	28,966.03		28,966.03	7.23	0.00	28,973.26
5005 SCH:JAMES E KINSLEY	37,533.03		37,533.03	9.26	0.00	37,542.29
5006 SCH:AMERICAN LEGION 284	52,636.44		52,636.44	11.31	1,500.00	51,147.75
5008 SCH:J PRENDIVILLE III	12,954.51		12,954.51	2.80	0.00	12,957.31
5009 SCH:M&P SMOLTEES	27,707.34		27,707.34	5.91	0.00	27,713.25
5010 SCH:J DEBAGGIS	2,942.47		2,942.47	0.35	0.00	2,942.82
5011 SCH:R J GREY	13,900.39		13,900.39	1.71	0.00	13,902.10
5012 SCH:CHARLES BATTIT	20,973.92		20,973.92	0.86	0.00	20,974.78
5013 SCH:J SCOTT	(122.27)		(122.27)	0.11	0.00	(122.16)
5014 SCHOLARSHIP:GENERAL	1,861.67		1,861.67	0.15	0.00	1,861.82
5015 FRED S KENNEDY SCHOLARSHIP	2,193.21		2,193.21	2.46	0.00	2,195.67
5016 CHS BRUSIE MEMORIAL SCHOLARSHIP	2,869.60		2,869.60	0.35	0.00	2,869.95
5017 THOMAS MEAGHER SCHOLARSHIP	5,351.84		5,351.84	0.67	0.00	5,352.51
5018 R & E MATUSOW SCHOLARSHIP	50,103.16		50,103.16	61.52	0.00	50,164.68
5020 SANDRA WILENSKY SCHOLARSHIP	2,105.87		2,105.87	0.26	0.00	2,106.13
5021 FREDERICK JOYCE MEMORIAL	3,003.13		3,003.13	0.38	0.00	3,003.51
5023 ALMA PARKHURST SCHOLARSHIP	19,810.09		19,810.09	2.44	0.00	19,812.53
5024 P HALL SCHOLARSHIP-Principal	10,000.00		10,000.00	0.00	0.00	10,000.00
5024 P HALL SCHOLARSHIP-Interest	3,125.90		3,125.90			3,125.90
<b>STUDENT ACTIVITIES</b>						
6001 STU ACTIVITY FUND-JH	36,373.25		36,373.25	19,641.62	0.00	56,014.87
6002 STU ACTIVITY FUND-SH	84,798.51		84,798.51	18,893.74	31,090.09	72,602.16
6003 STU ACTIVITY FUND-BL	18,039.02		18,039.02	177.07	0.00	18,216.09
<b>Trust and Agency Funds</b>	<b>439,885.08</b>	<b>0.00</b>	<b>439,885.08</b>	<b>38,820.55</b>	<b>32,590.09</b>	<b>446,115.54</b>

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**State and Federal Entitlement And Allocation Grants by District**District:  ▼Fiscal  ▼   
Year:**Acton-Boxborough-2015**

<b>Fund Code</b>	<b>Grant Name</b>	<b>Amount</b>
298	Early Childhood Special Education Program Improvement	8,000.00
240	IDEA 2015	1,201,508.00
274	SPED Program Improvement Grant	23,387.00
305	Title 1	168,702.00
180	Title III Formula	31,143.00
140	Title II-Part A	61,914.00
	<b>District Total</b>	<b>1,494,654.00</b>

[View by Fund Code](#)

## State and Federal Entitlement And Allocation Grants by District

District:  ▼

Fiscal Year:  ▼ 

### Acton-Boxborough-2016

Fund Code	Grant Name	Amount
298	Early Childhood Special Education Program Improvement	3,000.00
240	IDEA - Special Education Entitlement Grant	1,187,481.00
274	SPED Program Improvement Grant	44,528.00
305	Title I	152,240.00
180	Title III Formula	35,081.00
140	Title II-Part A	61,543.00
<b>District Total</b>		<b>1,483,873.00</b>

[View by Fund Code](#)



# Foundation Budget Review Commission

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**October 30, 2015**

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## ACKNOWLEDGEMENTS

The Foundation Budget Review Commission is grateful to the many individuals and organizations that contributed to the completion of its study.

First and foremost, the Commission gratefully acknowledges the exceptional work and support provided by David Bunker, who was hired by the Commission in September to manage the Commission's remaining work and complete an analysis of the topics identified by the Commission in its preliminary report. The Commission benefited enormously from David's extensive expertise and research, and his work was invaluable to the final production of the Commission's report.

We would like to thank Melissa King and Roger Hatch from the Department of Elementary and Secondary Education's Office of School Finance, who have contributed an extraordinary amount of time and expertise to the work of the Commission. The cooperation of Melissa and Roger in providing data and running projections has been instrumental to the Commission throughout the course of its deliberations, and we wish to express our gratitude for their efforts and support.

We would also like to acknowledge the members of the Advisory Committee who contributed valuable knowledge, experience, and perspectives throughout the Commission's work.

Finally, the Commission is grateful to the many groups and individuals who provided policy expertise and insight through presentations at various Commission meetings, including Dr. Karla Baehr, Dr. Paul Dakin, the Rennie Center for Education Research & Policy, and the Massachusetts Budget and Policy Center.

Senator Sonia Chang-Díaz  
*Co-Chairs*

Representative Alice H. Peisch

# Foundation Budget Review Commission Membership

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## Commission Chairs

**Senator Sonia Chang-Díaz**, *Senate Chair of the Joint Committee on Education*

**Representative Alice H. Peisch**, *House Chair of the Joint Committee on Education*

## Commission Members

**Tom Moreau**, *Secretary of Education Designee*

**Commissioner Mitchell D. Chester**, *Department of Elementary & Secondary Education*

**Commissioner Tom Weber**, *Department of Early Education & Care*

**Representative Michael Moran**, *Speaker of the House Designee*

**Senator Patricia Jehlen**, *Senate President Designee*

**Representative Kimberly Ferguson**, *House Minority Leader Designee*

**Edward Moscovitch**, *Senate Minority Leader Designee*

**Paul Reville**, *Governor Designee*

**Evan Ross**, *House Ways & Means Chair Designee*

**Senator Sal DiDomenico**, *Senate Ways & Means Chair Designee*

**Mayor Kevin Dumas**, *Massachusetts Municipal Association Appointee*

**Joe Esposito**, *Massachusetts Business Alliance for Education Appointee*

**Patrick Francomano**, *Massachusetts Association of School Committees Appointee*

**Mary Bourque**, *Massachusetts Association of School Superintendents Appointee*

**Barbara Madeloni**, *Massachusetts Teachers Association Appointee*

**John Coleman Walsh**, *American Federation of Teachers Massachusetts Appointee*

**John Lafleche**, *Massachusetts Association of Vocational Administrators Appointee*

**Michael Wood**, *Massachusetts Association of Regional Schools Appointee*

**David Verdolino**, *Massachusetts Association of School Business Officials Appointee*

## Advisory Members (non-voting)

**Mary Frantz**, *League of Women Voters of Massachusetts Appointee*

**Luc Schuster**, *Massachusetts Budget and Policy Center Appointee*

**JD Chesloff**, *Massachusetts Business Roundtable Appointee*

**Jennifer Francioso**, *Massachusetts Parent Teacher Association Appointee*

**Carolyn Ryan**, *Massachusetts Taxpayers Foundation Appointee*

**Jason Williams**, *Stand for Children Massachusetts Appointee*

**Chris Martes**, *Strategies for Children Appointee*

## Commission Staff

**Jennie Williamson**, *Research Director of the Joint Committee on Education*

**Nathanael Shea**, *Chief of Staff in the Office of Senator Sonia Chang-Díaz*

**David Bunker**, *Staff consultant to the Commission*

# Overview

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## Mission

Sections 124 and 278 of the FY15 State Budget established the Foundation Budget Review Commission (Commission) to “determine the educational programs and services necessary to achieve the commonwealth’s educational goals” and to “review the way foundation budgets are calculated and to make recommendations for potential changes in those calculations as the commission deems appropriate.” In conducting such review, the Commission was charged with determining “the educational programs and services necessary to achieve the commonwealth’s educational goals and to prepare students to achieve passing scores on the Massachusetts Comprehensive Assessment System examinations.” The statute also directed the Commission to “determine and recommend measures to promote the adoption of ways in which resources can be most effectively utilized and consider various models of efficient and effective resource allocation.” In the FY16 State Budget, the Commission was granted an extension until November 1, 2015 to finish its work, and issue a final report.

The members of the Commission approached their work in the spirit of those who originally proposed the Education Reform Act of 1993, and the many from the educational, business, philanthropic, governmental, and civic communities who have advanced its work in a bipartisan and collaborative way since then. We are convinced that providing a high quality education to every student within the Commonwealth regardless of wealth, income, educational background, or zip code is not only a matter of constitutional obligation but of generational responsibility. It is not only the means by which our children grow into active participants in our democracy and productive members of our economy, but by which they are given the tools of self-reflection and personal growth that ensure happy, successful, and fulfilled lives that fully unlock their potential, utilize their skills, and realize their dreams. Massachusetts has made great strides since 1993 in realizing this kind of high quality public education. Indeed, on many metrics, the Commonwealth is the envy of many other states and industrialized countries. But reports from the field and the research community alike in recent years have suggested that the system is fiscally strained by the failure to substantively reconsider the adequacy of the foundation budget since 1993, and that the formula may need re-tooling to meet the needs of the 21st Century. Moreover, 22 years after the advent of education reform, the challenge we have not yet achieved desired results on is to deliver quality consistently to all geographies and all demographic groups across our state.

To meet these challenges, the Commission focused not only on identifying areas where the foundation budget and district spending might be poorly aligned or out-of-date, but asked questions about best practice, efficiency, and productivity, to ensure that gaps between foundation budget assumptions and actual spending were not simply filled because they existed, but were filled because exhaustive analysis showed that either maximum efficiencies had been sought, or that even maximizing efficiencies would not have allowed districts to fully close such gaps. The Commission also undertook its task recognizing that the Department of Elementary and Secondary Education (DESE) has, in recent years, consistent with both the original Education Reform Act, and subsequent amendments to the law, including the Achievement Gap Act of 2010, been ramping up efforts to hold districts and schools accountable for results, and to ensure that every effort is being made to identify, reduce, and eliminate remaining achievement gaps. It was a special moral and fiscal focus of the Commission’s, then, to make sure that the schools and districts most likely to be held accountable for bringing high-need students to proficiency, also had sufficient resources to meet those standards, and educate their high-needs populations to the same standards as other students by reviewing the adequacy and efficacy of the ELL and low-income rates in the formula.

## Legislative Charge

**SECTION 124.** Chapter 70 of the General Laws is hereby amended by striking out section 4, as so appearing, and inserting in place thereof the following section:-

Section 4. Upon action of the general court, there shall periodically be a foundation budget review commission to review the way foundation budgets are calculated and to make recommendations for potential changes in those calculations as the commission deems appropriate. In conducting such review, the commission shall seek to determine the educational programs and services necessary to achieve the commonwealth's educational goals and to prepare students to achieve passing scores on the Massachusetts Comprehensive Assessment System examinations. The review shall include, but not be limited to, those components of the foundation budget created pursuant to section 3 of chapter 70 and subsequent changes made to the foundation budget by law. In addition, the commission shall seek to determine and recommend measures to promote the adoption of ways in which resources can be most effectively utilized and consider various models of efficient and effective resource allocation. In carrying out the review, the commissioner of elementary and secondary education shall provide to the commission any data and information the commissioner considers relevant to the commission's charge.

The commission shall include the house and senate chairs of the joint committee on education, who shall serve as co-chairs, the secretary of education, the commissioner of elementary and secondary education, the commissioner of early education and care, the speaker of the house of representatives or a designee, the president of the senate or a designee, the minority leader of the house of representatives or a designee, the minority leader of the senate or a designee, the governor or a designee, the chair of the house committee on ways and means or a designee, the chair of the senate committee on ways and means or a designee and 1 member to be appointed by each of the following organizations: the Massachusetts Municipal Association, Inc., the Massachusetts Business Alliance for Education, Inc., the Massachusetts Association of School Committees, Inc., the Massachusetts Association of School Superintendents, Inc., the Massachusetts Teachers Association, the American Federation of Teachers Massachusetts, the Massachusetts Association of Vocational Administrators, Inc., the Massachusetts Association of Regional Schools, Inc. and the Massachusetts Association of School Business Officials. Members shall not receive compensation for their services but may receive reimbursement for the reasonable expenses incurred in carrying out their responsibilities as members of the commission. The commissioner of elementary and secondary education shall furnish reasonable staff and other support for the work of the commission. Prior to issuing its recommendations, the commission shall conduct not fewer than 4 public hearings across regions of the commonwealth. It shall not constitute a violation of chapter 268A for a person employed by a school district to serve on the commission or to participate in commission deliberations that may have a financial impact on the district employing that person or on the rate at which that person may be compensated. The commission may establish procedures to ensure that no such person participates in commission deliberations that may directly affect the school districts employing those persons or that may directly affect the rate at which those persons are compensated.

**SECTION 278.** (a) The foundation budget review commission established in section 4 of chapter 70 of the General Laws shall file its report on or before June 30, 2015. A copy of the report and recommendations shall be made publicly available on the website of the department of elementary and secondary education and submitted to the joint committee on education.

(b) In addition to the membership listed in section 4 of chapter 70 of the General Laws and for the purposes of this review, there shall be 1 advisory nonvoting member of the foundation budget review commission from each the following organizations: the League of Women Voters of Massachusetts, the Massachusetts Budget and Policy Center, the Massachusetts Business Roundtable, the Massachusetts Parent Teacher Association, the Massachusetts Taxpayers Foundation, Stand for Children and Strategies for Children. Advisory members shall be informed in advance of any public hearings or meetings scheduled by the commission and may be provided with written or electronic materials deemed appropriate by the commission's co-chairs. Before finalizing its recommendations, the foundation budget commission established in said section 4 of said chapter 70 shall solicit input from advisory members who may offer comments or further recommendations for the commission's consideration.

## **Process and Method**

To inform its deliberations, the Commission conducted six public hearings across the Commonwealth to solicit testimony from members of the public (*refer to Appendix A for a summary of public hearing comments*). The Commission also held seven meetings between October 2014 and June 2015, during which members examined relevant research and considered information and data presented by various stakeholders (*refer to Appendix B for a summary of the Commission meetings and a list of documents reviewed at each meeting*). At the end of this period, recommendations were made and accepted relative to the foundation budget assumptions regarding health insurance and special education.

In September, the commission was able to hire a researcher and staff person, and instructed that the focus of remaining work be on identifying ways to reduce the achievement gap among low income students and English language learners by examining whether the existing additional amounts required by the formula are sufficient to meet the needs of those districts as defined by 2015 pedagogical standards and best practice. Multiple sources of evidence were considered in this phase of the work, including a review of national literature and research, as well as other state funding formulas, to determine whether our ELL and low income weightings in MA were adequate or in a reasonable national range, and interviews with superintendents, business managers, and teachers in MA districts that have found success in turning around schools and reducing or eliminating the achievement gap for high needs students. Given that insufficient time remained for either a professional judgment panel or a successful schools study, the commission's hope was that the principles underlying both models could be respected by seeking the advice, counsel, and professional judgment of those who had achieved some initial success at meeting the educational needs of ELL and low income students. The multiple sources of evidence gathered in this way are reflected in the additional recommendations made in this report relative to low income and ELL increments.

Finally, a number of areas remained in which the Commission either did not have time to carry out the due diligence needed to make an informed recommendation, or believes that current efforts and pilot programs must be continued and their results reviewed before any final inclusion of related costs in the Chapter 70 funding formula.

# Findings & Recommendations

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## – PART A –

### Foundation Budget Changes

The Education Reform Act of 1993 established the foundation budget to ensure adequate funding for all students in Massachusetts. Since then, some of the assumptions contained in the formula for calculating the foundation budget have become outdated. In particular, the actual costs of health insurance and special education have far surpassed the assumptions built into the formula for calculating the foundation budget.<sup>1</sup> As a result, those costs have significantly reduced the resources available to support other key investments. In addition, the added amounts intended to provide services to ELL and low-income students are less than needed to fully provide the level of intervention and support needed to ensure the academic and social-emotional success of these populations, or to allow the school districts serving them to fund the best practices that have been found successful.

## I. Health Insurance

### Findings

Actual spending on employee health insurance far exceeds the current foundation budget allotment for such costs, as noted in several recent studies.<sup>2</sup> Statewide, district spending on “Employee Benefits & Fixed Charges” exceeds the foundation budget allotment by more than 140%.<sup>3</sup> This is primarily due to the dramatic growth in health insurance costs nationwide and the fact that such costs have increased at a significantly higher rate than the rate of inflation used to adjust the foundation budget. In addition, the “Employee Benefits & Fixed Charges” component of the foundation budget does not include retiree health insurance, even though districts or communities incur such costs.

In developing the below recommendations, the Commission leveraged the collective expertise of its members to engage in discussions about how to address the discrepancy between the foundation budget and actual spending on health insurance. To inform such discussions, the Commission reviewed the factors encompassed in the “Employee Benefits & Fixed Charges” component of the formula, examined data on municipal health insurance trends, and reviewed information regarding the participation of school district employees in the state’s Group Insurance Commission (GIC) health plans.

### Recommendations

1. Adjust the employee health insurance rate captured in the “Employee Benefits/Fixed Charges” component of the formula to reflect the average<sup>4</sup> Group Insurance Commission (GIC) rate\* ;

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<sup>1</sup> Recent studies have estimated the gap between foundation and actual spending in these categories to be as high as \$2.1 billion combined (Massachusetts Budget & Policy Center, “Cutting Class: Underfunding the Foundation Budget’s Core Education Program,” 2011; Massachusetts Business Alliance for Education, “School Funding Reality: A Bargain Not Kept,” 2010; Massachusetts Department of Elementary & Secondary Education, “Report on the Status of the Public Education Financing System in Massachusetts,” 2013).

<sup>2</sup> Ibid.

<sup>3</sup> Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

<sup>4</sup> While the Commission recommends using the average rate, it acknowledges that there may be other benchmarks that the Legislature may find more appropriate.

\*The increment representing the other parts of the “Employee Benefits/Fixed Charges” component would remain the same.



2. Add a new category for “Retired Employee Health Insurance” to the foundation budget; and
3. Establish a separate health care cost inflation adjustor for the employee health insurance portion of the “Employee Benefits/Fixed Charges” component of the formula, based on the change in the GIC rates.

## II. Special Education

### Findings

Foundation enrollment accounts for the additional costs of providing special education services through an assumed rate of district enrollment, rather than an actual count of students. A district’s foundation enrollment is multiplied by 3.75% to add additional special education resources to the foundation budget. This translates to an assumption that 15% of students receive in-district special education services 25% of the time.<sup>5</sup> In actuality, around 16% of students receive some level of in-district special education services statewide<sup>6</sup>, which suggests that the foundation budget understates the number of in-district special education students. Out-of-district special education enrollment is assumed at 1% of foundation enrollment, which mirrors the rate of out-of-district special education placements statewide. However, districts spend far more on special education tuition for out-of-district placements than what is allocated through the foundation budget. In FY13, actual costs were 59% higher than the foundation budget rate of \$25,454.<sup>7</sup> To address the fact that the foundation budget understates the number of in-district special education students and the cost of out-of-district special education, the Commission has developed the below recommendations.

### Recommendations

1. Increase the assumed in-district special education enrollment rate from 3.75% to 4.00% (for non-vocational students) and 4.75% to 5.00% (for vocational students)
  - *Current assumption (3.75%) = 15% of students receiving SPED services 25% of the time*
  - *Proposed change (4.00%) = 16% of students receiving SPED services 25% of the time*
2. Increase the out-of-district special education cost rate to capture the total costs that districts bear before circuit breaker reimbursement is triggered. One example of how this might be done is to increase the out-of-district special education cost rate by an amount equal to the following:

$$[4 \times \text{statewide foundation budget per-pupil amount}] - [\text{statewide foundation budget per-pupil amount}^{**} + \text{out-of-district special education cost rate}]^{***}$$

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<sup>5</sup> 15% x 25% = 3.75%

<sup>6</sup> Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

<sup>7</sup> Melissa King & Roger Hatch, DESE. “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance.” March 2015. Powerpoint presentation.

\*\* Not including assumed SPED costs.

\*\*\* This would be a one-time adjustment, with the resulting rate increased by inflation each year thereafter.

### III. Budget Impact Summary: Health Insurance and Special Education Changes

Statewide Summary	GAA	25% Phase in	Difference	100%	Difference
	FY16	FY16		FY16	
<b>Enrollment</b>	942,120	942,120	0	942,120	0
<b>Foundation budget</b>	10,090,177,272	10,340,927,612	250,750,340	10,912,226,442	822,049,170
<b>Required district contribution</b>	5,943,909,031	6,002,726,108	58,817,077	6,080,502,587	136,593,556
<b>Chapter 70 aid</b>	4,511,521,973	4,607,300,066	95,778,093	4,943,298,626	431,776,654
<b>Required net school spending (NSS)</b>	10,455,431,004	10,610,026,174	154,595,170	11,023,801,213	568,370,210

The chart above illustrates the estimated impact of the Commission’s recommended adjustments to the foundation budget categories for health insurance and special education, expressed both as a one year cost and based on a four year phase-in. Note that because of the structural changes recommended to both the ELL and low income rates below, further work would be needed to ensure that the Chapter 70 spreadsheets accurately reflected those changes. Those recommendations would also entail an increase in the amount of Chapter 70 aid, not reflected in this chart. In addition, if the legislature chose to incorporate any of the issues raised in Part C of this report as being worthy of further study and consideration, the final cost to the state would increase further.

### IV. English Language Learners

#### Findings

A review of national literature showed that the weights for states with funding formulas that made adjustments for ELL students had weightings of between 9.6% and 99%. Although Massachusetts uses rates rather than weightings, those rates contain an implied weighting of between 7% and 34%. In general, then, MA weightings for ELL are well within the national range, with the exception of the high school rates of 7% and 40% respectively.

Although the origin of the high school rate differential is based in legitimately different class size assumptions in a historic iteration of the formula, it presents a challenge to the effective provision of services to the ELL population. A consistent point made by the superintendents and educators with whom we spoke was the sharp rise in students with interrupted education (SIFE) and students with limited or interrupted formal education (SLIFE), often children from war torn regions, or refugees, who have serious social and emotional needs, and arrive at school with little to no formal education for school districts to build upon. This challenge is exacerbated at the high school level, where such gaps in learning must be made up in an extremely short time frame, often with highly staff-intensive interventions involving class size of 10 or less per teacher, and support staff as well. Next, vocational schools which serve significant numbers of ELL students have frequently pointed out to the Commission that they receive no additional support in meeting their students’ needs through the formula, because the ELL student amount is calculated as a base rate per student rather than as an added

increment. Therefore, no ELL increment is applied to the vocational foundation budget, despite the significant needs some vocational districts face in educating this population. Finally, smaller districts and their advocates urged that funding and flexibility remain in the formula in recognition of the fact that they too often have ELL learners, but, due to low incidence, may meet those needs in creative and cost-sharing ways with other districts.

### **Recommendations**

1. Convert the ELL increase from a base rate to an increment on the base rate.
2. Apply the increment to vocational school ELL students as well.
3. Increase the increment for all grade levels, including high school, to the current effective middle school increment of \$2,361. This would increase the range of ELL-only weightings and expand available funds for staff-intensive high school age interventions.

## **V. Low-Income Students**

### **Findings**

Recommended weightings for low income students in the national literature range from an (admittedly conservative) 40% more than the base per student rate to 100% more. The low income increments in MA range from 32% at the high school level to 50% at the junior high/ middle school level, with low income ELL running between 30% and 84%. In our effort to determine where in the broader range of weightings MA should fall, the Commission reviewed the testimony made at public hearings and undertook focused interviews with successful educators in the fall. Among districts which had successfully carried out turnaround efforts, either district wide, or at select schools within the district identified as Level Four schools, many common themes and best practices emerged as worthy of replication in the effort to better meet the needs of ELL and low income learners, and reduce remaining achievement gaps, a few of which follow:

1. Extending the school day or year: This was among the top of the strategies identified as having been successful in the schools where it is tried. It is often extended to allow both more learning time for students, and common planning time for teachers and staff. More time is frequently viewed as essential to overcome existing deficits in learning and achievement.
2. Social and Emotional Needs/ Mental and Physical (including Oral) Health: Although educators are quick to stress that social and emotional needs are different and distinct from mental health, almost everyone interviewed stressed that the growth of need in this area has been staggering. Many asserted that they could not have accurately predicted in 1993, or even ten years ago, how much more effort and cost would be needed to ensure an adequate supply of social workers, guidance and adjustment counselors, wraparound coordinators, and other staff to ensure that the needs of their students are met, and that students arrive school stable and ready to learn.
3. Instructional Improvement: Improving instruction is usually key to any successful school turnaround, and several strategies emerge as valuable here: increased and improved professional development, common planning time for teachers and staff, and the use of instructional teams and instructional coaches.
4. Targeted Class Size Reductions for the Highest Need Populations: Although the formula's assumptions for K-3 class size, and for high needs students, are fairly low, several educators stressed that, for certain of the highest need populations, such as the SIFE/SLIFE ELL students mentioned above, or other high

school students with significant gaps to redress in a short time, or students with significant social-emotional needs, or who are at high risk of dropping out, or have a high history of truancy, who need intensive staff attention to help keep them in school and on task, class sizes lower than 10 to 1 were often necessary to increase achievement rapidly.

5. Early Education: Full Day Kindergarten and Full Day Pre-K. Many of the educators indicated both that bringing full day K into their districts had significantly impacted and improved school readiness, and that high on their wish list was the extension of full day pre-K and other early learning services in their districts.

For some of these strategies, the Commission was presented with solid and detailed estimates for what these implementations cost. MA 2020 presented evidence that extended learning time (or ELT) costs approximately \$1300-1500 per student. The Mass Budget and Policy Center (MBPC) presented a costing out of comprehensive wraparound services that was estimated at \$1300 per student. Worcester school officials presented evidence that their successful efforts at turning around Level 4 school cost about \$2000 more per student than other schools in the district received. Other strategies proved more elusive to cost out, although the range of weightings found in literature ranged from a conservative 40% in the Education Trust review, to 50% in the work of the Education Reform Review Commission of 2002, to almost 100% in Maryland. It was also clear from our interviews and emerging practices in other states that districts with the highest concentrations of poverty had a correspondingly high need for funding. The fact of concentration of challenging populations itself caused a change in the asset mix available to, and the expenditures required of, districts. They especially needed the educational and pedagogical synergies created by making more than one reform happen at a time.

The other challenge faced by the Commission was this: No one strategy or group of strategies is used consistently in every school district, but no model district limited so itself to one strategy only. Successful districts, and successful school turnarounds, require multiple concurrent, overlapping and reinforcing strategies, the exact details of which will vary from district to district. The question before the Commission was: How shall we account for the varying costs of diverse strategic educational choices through a standardized formula without simply summing the costs of every possible strategy, or limiting districts to one strategy at a time? The recommendations below attempt to find a way through that question by recommending that the low income increment be increased based on concentration of poverty, and that the poorest districts be provided enough per student to ensure that two to three reforms might be carried out simultaneously.

## **Recommendations**

1. Increase the increment for districts with high concentrations of low income students. The Legislature will need to determine specific increments based on further review of data and debate, but based on its review of national literature, practices in other states, and model districts within our own state, the Commission offers the guidance that that weighting should fall within the range of 50%-100% and that multiple concurrent interventions are necessary to effectively close achievement gaps. The final decision should provide high poverty school districts with enough funding to pursue several turnaround strategies at once.
2. Ensure that any new definition of economically disadvantaged (necessitated by districts' shift away from collection of free and reduced school lunch eligibility data) properly and accurately count all economically needful students.
3. Leave the exact calculation of each increment to legislative action.
4. Require each district to post a plan online, on a highly accessible and visible state website as well as their district site, about how it will use the funds calculated in the ELL and low income allotments to serve the

intended populations, what outcome metrics they will use to measure the success of the programs so funded, performance against those metrics, and, subsequently, the results of the funding on improving student achievement. The plan will be public, but not subject to approval by DESE. The plan, which can be part of required school improvement plans, should detail how funds are being used to improve instructional quality, and/or ensure that services are provided that allow every student to arrive at school physically and mentally healthy, with their social and emotional needs met, and ready to learn.

5. Consistent with testimony provided to the Commission, the interviews conducted by Commission staff, and a national literature review to identify best practices, we anticipate that districts will use funding flexibility for one or more of the following best practices: a) expanded learning time, in the form of a longer day and/or year, and inclusive, where appropriate, of common planning time for teachers, b) wraparound services that improve and maintain the health of our students, including social and emotional health and skills, mental health and oral health, c) hiring staff at levels that support improved student performance and the development of the whole child, d) increased or improved professional development rooted in pedagogical research, and focused on instructional improvement, including evidence-based practices such as hiring instructional coaches, e) purchase of up-to-date curriculum materials and equipment, including instructional technology, and f) expanding kindergarten, pre-school, and early education options within the district.

## – PART B –

### EFFICIENT AND EFFECTIVE RESOURCE ALLOCATION

In the course of deliberations, Commission members often found themselves desiring even more detailed information than that immediately available. In addition, in approving foundation budget increases, they wanted to ensure the funding was used effectively and accountably to meet the educational needs of our most vulnerable children and high needs students. The first part of the recommendations below represents specific recommendations relative to the low income and ELL increment increases proposed in Part A of this report, and about school-based budgeting, the second part is the recommendation of a data working group that made recommendations to the Commission in September, and the third section contains the recommendations of the Commission relative to early education.

#### **Data Collection Recommendations**

1. Establish a data collection and reporting system that tracks funding allocated for ELL and Low Income students to ensure that spending is targeted to the intended populations, and to provide a better data source to future Foundation Budget Review Commissions about the accuracy and adequacy of the low income and ELL increments.
2. Establish a data collection and reporting system that allows for greater access to school-level expenditures and data across all districts to increase the understanding of state level policy makes about effective school-level interventions and investments, and which connects that data to student achievement data so more informed decisions can be made about the productivity, efficiency , and effectiveness of state expenditures.

#### **Stakeholder Data Advisory Group Recommendations**

1. *Establish Stakeholder Data Advisory Committee*

The Department of Elementary and Secondary Education (DESE), in collaboration with the Executive Office of Education (EOE), should convene a Stakeholder Data Advisory Committee to promote effective resource allocation decisions at the local level

2. *Purpose of Data Advisory Committee*

The Data Advisory Committee will assist DESE to identify, implement and assess cost-effective ways to achieve three goals:

- a) Streamline financial reporting, eliminate duplicate reporting requirements, and improve data quality
- b) Strengthen DESE capacity to analyze and report staffing, scheduling and financial data in ways that support strategic resource allocation decisions at the district and school level
- c) Strengthen district capacity to use data to make strategic resource allocation decisions

3. *Reports to the Board and Joint Education Committee*

The Data Advisory Committee will report its progress to the Board of Elementary and Secondary Education and to the Co-chairs of the Joint Committee on Education at least semi-annually, and will make such recommendations for new funding as are necessary for DESE to achieve the goals.

4. *Work of the DESE*

DESE actions to achieve these three goals may include:

- Work with MTRS to obtain individual teacher salary information

- Develop strategies for securing more school-level financial data, including, where appropriate, developing ways to apportion more district expenditures to schools automatically
- Improve data accuracy by identifying more ways to “automate” the identification of “outlier” data on EPIMS staffing and EOY financial reports from districts to prompt district review
- Strengthen its training for district staff to improve accuracy and consistency of data reporting with special attention to: a) the use of clear and consistent definitions, and b) expected use of “Reports Tab” to explain significant changes and/or “outlier” data
- Eliminate duplication of effort at state and local levels by: a) aligning finance data with staffing (EPIMS) and enrollment (SIMS) data collections, and b) aligning grants management and reporting with EOY financial reporting
- Identify potential models, requirements, impacts, and estimated cost for a new financial reporting system
- Develop more powerful, actionable and publicly-available information and reports that combine and benchmark staffing, scheduling, and district/school-level funding data to support strategic resource allocation decisions at the local level
- Expand research focused on identifying promising practices for efficient and effective district and school resource allocation
- Collaborate closely with MASBO and MASS to develop the on-line (and other) training and support that DESE, education collaboratives, and local district and school staff need to make effective use of the current and new data and research
- Take other actions deemed necessary to achieve the goals

##### 5. *Implications for Future State Funding*

Many of the above actions will require a cost-benefit analysis of a range of options. For some chosen options, new state funding will need to be recommended and secured.

### **Early Education**

High-quality preschool is an effective practice identified by most school districts as one which increases the school readiness of students, especially high need students, and which is therefore worthy of further consideration and action by the legislature as it updates the structure and financing of public education for the 21st Century. While the Commission did not have sufficient time or resources to undertake specific recommendations on early education, it was a practice that was frequently highlighted in both national literature and in feedback from model districts within the Commonwealth—both for closing achievement gaps for disadvantaged students and in reducing special education costs for districts and the state. The state is currently using federal funds from the Preschool Expansion Grant (PEG) program, and some supplemental state funds, to examine and explore ways in which early education can be provided and expanded through the existing and robust mixed delivery system of public and private providers. As it considers whether the Chapter 70 funding formula can be adapted appropriately as a funding vehicle for the ongoing provision of pre-school, the Commission encourages the Legislature to incorporate the implementation wisdom gained through the PEG pilot programs and the Commonwealth’s other early education program, quality, and access initiatives as it rolls out any effort to provide these services more widely.

## – PART C –

### **OTHER**

The Commission wishes to make the following observations and recognitions, which due to time constraints, and limited resources, it has been unable to address more extensively:

#### **I. IN-DISTRICT SPECIAL EDUCATION**

A review at the September meeting of in-district SPED spending data confirms that the average expenditure per pupil exceeds the rate currently included in the foundation budget, and that, even upon adoption of the changes recommended in this report, a gap will remain of approximately \$700M between foundation budget assumptions, and district reported spending, and between foundation budget assumptions about staffing (assuming 4,394 teachers, or 8 special education FTEs to one teacher), and current practice (9,915 special education teachers, or approximately 5 special education FTEs to one teacher). Some evidence and testimony was presented that the central change driving this gap was that the original foundation budget for in-district special education was built on a model of substantially separate instruction, which has changed significantly over time to reflect the growing use of inclusion as the preferred pedagogical model in the Commonwealth. Since that model involves special education students spending most or all of their day in regular education classrooms, with special education (and para-professionals) coming into the classroom to provide extra help for struggling students, the working hypothesis of several Commissioners is that the added staffing needs of that model account for the significant difference in staffing and funding levels between the foundation budget and reported spending. Commissioners also noted the following challenges related to the data as presented: a) actual reported special education costs, including the counting of staff FTEs, don't line up precisely with functional categories in the foundation budget, and b) not all functional categories are collected by program, leaving key data missing for special education. In addition, some Commissioners expressed a desire for a more detailed review of district practice to confirm that inclusion, and its broad adoption at the district level, is the chief reason for any remaining funding shortfall, and to further examine how best to account for reported costs that may be shared between regular and special education. The Commission simply did not have sufficient time or resources to further analyze and review district teaching and funding practices in order to inform more specific recommendations. The gap between the foundation budget in-district SPED rate and actual district-level per pupil costs needs further attention by the legislature, in order to ensure that Chapter 70 supports best practices in creating and maintaining a 21st century special education system.

The Commission further notes that, while any increase made to the foundation budget to reflect special education costs would result in increased Chapter 70 aid for many districts, such additional funding would not need to be spent on special education services solely. Because special education is a legal entitlement, districts must fund individual education plans for all students in special education. Therefore, any gap between the foundation budget categories and actual legal obligations results in funds being diverted from other instructional priorities of the district to fund obligatory special education costs. Any increase in the Chapter 70 assumptions about special education that increases Chapter 70 aid to a district also frees up "other" funds currently being spent on special education services, and allows districts to make a broader set of investments in core instructional services and other supports that benefit the entire learning community of that district, should the district so choose. It is the expectation of the Commission that by more accurately reflecting special education (and health insurance costs) in the Chapter 70 formula, the Legislature will make possible numerous exciting reforms and instructional improvements that are currently beyond the fiscal capacity of the Commonwealth's school districts.



## **II. INFLATION FACTORS**

The Commission also recognizes that, although the Chapter 70 formula contains an inflation adjustment, which has been applied in most years since 1993, in 2010, faced with a sharp downturn in revenues, and the serious budget challenge that resulted, the final budget used a lower inflation number (3.04%) from a different quarter than the quarter required by statute (6.75%). A correction for this “missed” quarter that acknowledges the statutory cap on inflation of 4.5% results in an adjustment of 1.4 % in FY16, and would have required additional Chapter 70 aid of almost \$55 million. A correction that suspended the statutory cap results in an adjustment of 3.6 % in FY16, and would have required additional Chapter 70 aid of almost \$158 million. Note, however, that these estimates were calculated separately from the recommendations made in Part A of this report. Were those changes adopted, there would be no need to make a corrective fix to those elements of the formula, which would lower the estimates above, and allow an inflation adjustment to be made to remaining categories for a lower cost in Chapter 70 aid.

## **– PART D –**

### **CONCLUSION AND NEXT STEPS**

As the Commission's work draws to a close, the legislature's work begins. We submit this report to the legislature with full recognition of the continued fiscal challenges of the Commonwealth, and the many competing priorities, and worthwhile goals, that the legislature must balance in crafting the annual state budget. We recognize that recommendations of this scope and size will need to be phased in to be affordable. However, we also note again what was stated at the beginning of this document: that the good work begun by the education reform act of 1993, and the educational progress made since, will be at risk so long as our school systems are fiscally strained by the ongoing failure to substantively reconsider the adequacy of the foundation budget. We therefore urge that the legislature act on these recommendations with a profound sense of the risks and opportunities at stake for our shared prosperity as a state and, as our constitution acknowledges, the critical nature of education to the health of our democracy. We advise a keen sense of the urgency when it comes to addressing the identified funding gaps, and the moral imperative of reducing the remaining achievement gaps.

The Commission also hopes, after passage of any revisions to Chapter 70, that careful and continued attention will be paid to the adequacy of the foundation budget, to the effectiveness of the implementation of any Chapter 70 revisions, and to best practices that emerge over coming years. We encourage the legislature to make the work of the Commission recurring, on some regular interval of years as was originally envisioned by the 1993 Act, since both pedagogical wisdom and relevant changes in our economy and society will always be emerging. We hope that, with the assistance of such a reconvened commission, the legislature will be in a position to act expeditiously on any new fiscal needs or implementation challenges that have arisen in the interim, or new strategies that permit more efficient and effective use of funds. Noting the challenges and frustrations faced by this Commission as the result of a lack of dedicated and funded staff, we strongly recommend that dedicated and timely funding be provided to any future Commission to allow a rigorous review of available data to make decisions that are in best long term interests of the Commonwealth both fiscally and educationally.

Education reform in Massachusetts is now 22 years old, and its strength has derived from a solid bipartisan commitment both to high academic standards and to providing adequate funding to allow districts to meet those standards. As a Commission composed of members from the educational, business, philanthropic, governmental, and civic communities, we hope that our proposals represent another step in that journey towards academic excellence and educational equity, and we look forward to continuing our work together to see these changes enacted and signed into law.

# Appendix A

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The Commission held six public hearings across the state to solicit testimony from members of the public. A summary of the main themes and issues that were raised during the public hearings are listed below. *This list reflects the testimony heard at the public hearings only and is not meant to convey the Commission's formal findings or recommendations.*

## Public Hearings Summary

- Actual spending on Special Education and Health Insurance far exceeds the foundation budget assumptions. As a result, foundation spending is consumed by these under-funded fixed charges, leaving less funding available to support other educational programs.
- Need to increase funding for at-risk students – especially low income and ELL students.
- The foundation budget does not provide sufficient resources to address the mental health needs of today's students.
- The foundation budget should provide greater support for wraparound services.
- The Commission should examine district allocation practices and efforts to remove barriers to efficient and adaptive uses of funds.
- Technology should be included in the foundation budget as such costs were not envisioned in the original foundation budget.
- The Commission should propose changes to simplify and clarify the foundation budget to make it easier for citizens to understand how funds are spent and whether these are bringing about results.
- Money should follow the student at the school level, to ensure that additional aid is being spent on the students who it is intended to benefit.
- Reconsider the use of October 1<sup>st</sup> enrollment data to calculate foundation budgets, which is especially problematic for districts that experience significant fluctuations in student enrollment throughout the year.
- The current method of funding charter schools is creating significant and growing financial difficulty for municipalities and school districts.
- The Commission should consider whether there is sufficient funding in the foundation budget for building maintenance.
- The foundation budget formula does not account for the cost of unfunded mandates.
- Need a better enforcement mechanism and/or greater clarity regarding a municipality's obligation to appropriate sufficient funds to meet the required local contribution.
- Transportation should be included and funded in the foundation budget.
- Need to address "equity" issues – the Commission should review and adjust the local contribution and school aid calculation factors in the Chapter 70 formula.
- The Commission should address concerns surrounding vocational education – i.e. how vocational education students are recruited and accepted, how tuition is calculated, and the high cost of student transportation.
- The foundation budget should include funding for school libraries.
- The foundation budget should account for the differences in costs among smaller, rural districts.

# Appendix B

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## **Summary of Commission Meetings & Materials**

### **Meeting # 1: October 9, 2014**

Commission members reviewed the charges set forth in the authorizing legislation (*Sections 124 & 278 of Chapter 165 of the Acts of 2014*), viewed a presentation on the foundation budget formula entitled “Measuring Adequacy – the Massachusetts Foundation Budget” prepared by Melissa King and Roger Hatch from the Department of Elementary & Secondary Education (DESE), and discussed the public hearing schedule. Commission members received the following materials: A copy of the authorizing legislation (*Section 124 & 278 of Chapter 165 of the Acts of 2014*), a summary of the authorizing legislation, and a copy of the power point presentation entitled “Measuring Adequacy – the Massachusetts Foundation Budget”.

### **Meeting #2: March 10, 2015**

Commission members viewed a presentation on special education and health insurance entitled “Massachusetts Foundation Budget: Focus on Special Education and Health Insurance” prepared by Melissa King and Roger Hatch from DESE, viewed a presentation on municipal health insurance trends prepared by Carolyn Ryan from the Massachusetts Taxpayers Foundation, and reviewed the Commission’s meeting schedule and timeline. Commission members received the following materials: a copy of the power point presentation entitled “the Massachusetts Foundation Budget: Focus on Special Education and Health Insurance”, a copy of the power point presentation entitled “Municipal Health Insurance Trends”, and a copy of the Commission’s meeting schedule.

### **Meeting #3: March 27, 2015**

Commission members viewed a presentation on the other foundation budget categories and differences in spending among districts entitled “Further Analysis of the Foundation Budget” prepared by Melissa King from DESE, viewed a presentation on the wage adjustment factor prepared by Melissa King from DESE, and considered information provided by DESE Commissioner Mitchell Chester on the relationship between spending and student outcomes. Commission members received the following materials: a copy of the power point presentation entitled “Further Analysis of the Foundation Budget”, a copy of the power point presentation entitled “Wage Adjustment Factor”, and a list of school districts by wealth and low-income quintile.

### **Meeting #4: April 14, 2015**

Commission members viewed a presentation on evidence-based strategies for improving student outcomes entitled “Building a Foundation for Success” prepared by Chad d'Entremont and Luc Schuster from the Rennie Center and Mass Budget and Policy Center, considered information provided by Dr. Paul Dakin (Superintendent of Revere Public Schools) regarding the various investments and programs that have yielded positive outcomes in Revere, and discussed the process for reviewing and voting on recommendations that would be included in the Commission’s final report. Commission members received the following materials: a copy of the power point presentation entitled “Building a Foundation for Success”, and a handout on Revere Public Schools provided by Dr. Paul Dakin.

### **Meeting #5: May 5, 2015**

Commission members viewed a presentation on effective resource allocation entitled “Effective & Efficient Resource Allocation: A Framework to Consider” prepared by Dr. Karla Baehr, discussed and approved changes to the Commission’s timeline and work plan, and reviewed a draft proposal containing recommendations for

health care and SPED adjustments. Commission members received the following materials: a copy of the power point entitled “Effective & Efficient Resource Allocation: A Framework to Consider”, a copy of the work plan proposed by Senator Chang-Díaz, and a copy of the draft recommendations for health care and SPED adjustments.

**Meeting #6: June 9, 2015**

Commission members reviewed and approved final recommendations for Health Care and SPED adjustments, considered proposals relative to full-day preschool and accountability, and discussed the other topics to be considered by the Commission during its extended deliberations. Commission members received the following materials: a copy of the final recommendations for health care and SPED adjustments, a document containing draft proposals relative to full-day preschool and accountability, and a copy of the Commission’s updated work plan.

**Meeting #7: June 23, 2015**

Commission members reviewed and approved edits to the preliminary report, discussed the process and methodology for analyzing the other topics to be considered during the Commission’s extended deliberations, and reviewed information presented by Roger Hatch from DESE on school-based data collection. Commission members received the following materials: a draft of the preliminary report, a document explaining the foundation budget comparison tool developed by Commission member Ed Moscovitch, and a document on school-level finance data.

**Meeting #8: September 28, 2015**

Commission members were introduced to David Bunker, who was hired by the co-chairs to staff the commission and draft the final report. They also reviewed and commented on his work plan, which was centered around examining the adequacy of the low income and ELL adjustments in the formula. Melissa King of DESE gave a presentation on in-district special education costs, members held a discussion on the “accountability” and “conditions” recommendations, and Dr. Karla Baehr gave a presentation of potential recommendations on data collection, which were unanimously approved by Commission members. Commission members received: a copy of the agenda, a copy of the work proposal prepared by David Bunker, a copy of the Power Point presentation on “In District Special Education Costs” by Melissa King, a document prepared by Dr. Karla Baehr containing recommendations to support effective and efficient allocation of resources, and a document containing a list of the “Accountability” proposals that the Commission has considered to date.

**Meeting #9: October 16, 2015**

Commission members reviewed the recommendations of David Bunker regarding the low income and ELL adjustments. They also discussed the issue of efficient resource allocation and reporting on spending. Finally, they had a follow-up discussion about in-district special education, and other remaining concerns expressed by Commission members.

ACTON-BOXBOROUGH REGIONAL HIGH SCHOOL


36 Charter Road, Acton, Massachusetts 01720

*Together we promote respect for self, others, and learning.*

JoAnn Campbell  
Principal, Ed.D.

November 16, 2015

To: Glenn Brand

From: JoAnn Campbell 

Re: Acceptance of grant funding

The HS has been awarded a grant from the Toshiba America Foundation in the amount of \$10,500 to fund the "Human Performance Laboratory Project", a collaborative project between the Science and PE departments. Please present this grant to the School Committee for their vote of acceptance.

Thank you.

JoAnn

**ABRSC 2015-16 Goals - October 23, 2015**

**Professional Practice Goal #1**

**Participate in and complete the Massachusetts' Association of School Committees' District Governance Program to improve the efficiency and effectiveness of our committee.**

*Actions planned:*

*Workshop series throughout first half of 2015-16 school year to focus on development of Committee Operating Protocols, alignment of district's mission/vision/goals with our own Committee goals, and put in place a system to monitor and sustain progress in these areas.*

**District Improvement Goal #1**

**Proactively address current and future capital needs of the district to best inform our budget planning process, both for FY '17 and longer-term.**

*Actions planned:*

- *When receive plan in January 2016, "make it ours"*
  - *Read & understand plan*
  - *Share findings at community forums (both towns, both towns' boards)*
  - *Participate in & support Future School Needs Committee*
  - *Support Phase II in FY '17 budget*

**District Improvement Goal #2**

**Improve community engagement to help inform SC decision-making while also helping the community understand our issues and the rationale behind decisions made.**

*Actions planned:*

- *Complete updated "demographic survey"*
  - *Plan/change name*
  - *Implement*
  - *Analyze*
  - *Report out*
- *Drive traffic to SC website/district website as appropriate*
- *Specific outreach on issues of interest*
- *Better engage PTO/PTF/School Council groups, Interschool Council*

**Student Learning Goal #1**

**Create, support and promote a FY '17 budget that supports the needs of all students, while also beginning the process of engaging in longer-range budget planning to support the district's long-range goals.**

*Actions planned:*

- *Revised budget calendar to improve process leading to town meeting votes*
- *Use AB Connector and other vehicles for community communications*
- *Continue to use Budget Subcommittee to preview budget issues and steer the process of budget development*

### SCHOOL COUNCILS

The School Committees believe that the school is the key unit for educational improvement and change and that successful school improvement is best accomplished through a school-based decision-making process. By involving those directly affected by any action or decision of the school council in the process of determining that action or decision, it helps to strengthen the commitment to those decisions by those most affected by its implementation.

Under this policy, the Principal shall have primary responsibility for the management of the school. Decisions which are made at the school level must be aligned with the budget, policies, curriculum, and long-range and short-range goals adopted by the School Committees. In addition, decisions must comply with any state and federal laws and regulations and with any negotiated agreements of the school districts.

As enacted by the state legislature in the Education Reform Act of 1993, a school council shall be established in each school to advise the Principal in specific areas of school operation. The Principal, except as specifically defined in the law, shall have the responsibility for defining the composition of and forming the group pursuant to a representative process approved by the Superintendent.

The following guidelines define the role of the school council:

*(a minimum of 6 meetings per year)*

The School Council shall meet regularly with the Principal of the school and shall assist in:

1. Adoption of educational goals for the school that are consistent with state and local policies and standards.
2. Identification of the educational needs of the students attending the school.
3. Review of the school building budget.
4. Formulation of a school improvement plan in accordance with state statues which is implemented only after the Superintendent's approval.

LEGAL REFS.: M.G.L. 71:38Q, 71:59C

First Reading 11/5/15  
Second " 11/19/15



## SCHOOL IMPROVEMENT PLAN

Each Principal, in conjunction with the School Council, shall be responsible for preparing a written school improvement plan annually. This plan shall be written with the advice of the School Council and submitted for approval to the Superintendent. The plan should be drafted with the following in mind:

1. Educational goals developed with the needs of the school in mind.
2. A focus on student learning with plans around improvement.
3. Professional learning for the school's staff.
4. Parental involvement in the life of the school, safety, and discipline.
5. The diverse learning needs of every child.
6. Any further subjects as the Principal, in consultation with the school council, shall consider appropriate, except that:
  - a. The council shall have no authority over matters that are subject to Chapter 150E, the collective bargaining law, and
  - b. The council may not expand the scope of its authority beyond that established in law or expressly granted by School Committee policy.

10/2/15

## SUBMISSION AND APPROVAL OF THE SCHOOL IMPROVEMENT PLAN

The written school improvement plan shall be submitted by the Principal to the Superintendent for review and approval by June 1st of each year. The Superintendent shall make copies of the plans for the School Committee's review.

It is important that the school council be aware of the expectations regarding the school improvement plan. The school improvement plan should:

1. Focus on student learning.
2. Describe expected student outcomes and observable results.
3. Align with the mission of the School Districts and any goals and policies of the School Districts.
4. Be consistent with state and federal law, School District policy, established curriculum and negotiated agreements.
5. Identify implementation plans.
6. Provide annual progress report including analysis of student performance.

If the school improvement plan is not approved by the Superintendent, it shall be returned to the Principal with specific comments as to the reason(s). The Principal shall revise the plan in cooperation with the School Council, and resubmit it for approval.

10/2/15

## CONDUCT OF SCHOOL COUNCIL BUSINESS

The Principal shall, by law, serve as co-chair of the council. The second co-chair will be elected annually by the council members at its first meeting of the school year subsequent to the elections of new council members. The co-chairs will be responsible for the preparation of the agenda for the council meetings.

It is recommended that the school council meet a minimum of 6 – 8 times during the school year. Meetings will be held outside of school hours. At its first meeting of the school year, the council will set its calendar of regular meetings for the year. Where circumstances warrant, the council may choose to call additional meetings.

School councils shall use consensus as the primary method to resolve issues and to formulate recommendations. Votes by majority may be taken at the discretion of the Principal and Robert's Rules of Order shall prevail if there are questions of procedure.

All meetings of the School Council shall conform to the Open Meeting Law, Sections 23 A, B, and C, which stipulate that all meetings be open to the public, that meetings be posted at least 48 hours in advance, and that minutes of the meeting shall be maintained as required. The scope of the school council does not require, and therefore does not qualify for, executive session.

Agendas and approved minutes for all School Council meetings shall be posted on the school's website, ideally located within a specific section for School Council business.

10/2/15

NEW SCHOOL COMMITTEE MEMBER ORIENTATION – First Read 11/5/15

The School Committee Chair and Superintendent will hold one or more orientation meetings with newly elected or appointed members to assist them in understanding the School Committee's functions, policies and procedures.

The Chair and/or Superintendent shall clarify policy and procedures that involve:

- A. arranging visits to schools or administrative offices
- B. requesting information regarding school district operations
- C. responding to community requests/complaints concerning staff or programs
- D. handling confidential information

Each new member shall be given Acton-Boxborough Regional School District's *School Committee Guidebook* with information on, but not limited to, the following materials and training requirements:

- A. School Committee policies
- B. Open Meeting Law
- C. Conflict of Interest Regulations
- D. The district's budget
- E. Collective bargaining agreements and contracts
- F. Student and staff handbooks

Additionally, in accordance with the requirements of Massachusetts General Law, each new School Committee member elected to the Acton-Boxborough Regional School Committee is required to complete, within one year of their initial election or appointment, at least eight hours of accredited orientation training. This orientation shall include, but is not limited to, a review of School Finance, the Open Meeting Law, Public Records Law, Conflict of Interest Law, Special Education Law, Collective Bargaining, School Leadership Standards and Evaluations, and the Roles and Responsibilities of School Committee Members. This orientation is offered at no charge to the school committee members by the Massachusetts Association of School Committees and by other approved groups.

LEGAL REF.: M.G.L. 71:36A

## NEW SCHOOL COMMITTEE MEMBER ORIENTATION

~~The School Committees and Superintendent shall assist each new member to understand the Committees' functions, policies and procedures of the Committees.~~

The School Committee Chair and Superintendent will hold one or more orientation meetings with newly elected or appointed members to assist them in understanding the School Committee's functions, policies and procedures.

The Chair and/or Superintendent shall also clarify policy and procedures that involve:

- A. arranging visits to schools or administrative offices
- B. requesting information regarding school district operations
- C. responding to community requests/complaints concerning staff or programs
- D. handling confidential information

Each new member shall be given Acton-Boxborough Regional School District's *School Committee Guidebook* with information on, but not limited to, the following materials and training requirements:

- ~~A. A copy of the School Committees policy manual policies~~
- B. A copy of the Open Meeting Law
- C. A copy of the Conflict of Interest Regulations
- D. A copy of The district's budget
- E. Collective bargaining agreements and contracts
- F. Student and staff handbooks

~~Each new member shall also receive any other materials the Chair and/or the Superintendent determine to be necessary.~~

Additionally, in accordance with the requirements of Massachusetts General Law Chapter 71, Section 36A as amended on December 24th, 2002, each new School Committee member elected to the Acton School Committee and the Acton-Boxborough Regional School Committee is required to complete, within one year of their initial election or appointment, at least eight hours of accredited orientation training. This orientation shall include, but is not limited to, a review of School Finance, the Open Meeting Law, Public Records Law, Conflict of Interest Law, Special Education Law, Collective Bargaining, School Leadership Standards and Evaluations, and the Roles and Responsibilities of School Committee Members. This orientation is offered at no charge to the school committee members by the Massachusetts Association of School Committees and by other approved groups.

LEGAL REF.: M.G.L. 71:36A

**ALG Minutes October 29, 2015**

Present: Bart Wendell, Facilitator; Katie Green & Peter Berry, BoS; Margaret Busse & Mike Majors, FC; Kristina Rychlik, SC; Steve Ledoux, Glenn Brand, Steve Barrett & Marie Altieri, Staff. Absent: Paul Murphy, SC.

Audience: Clare Jeannotte, Janet Adachi, Brian Mc Mullen, Charlie Kadlec & Bob Ingram.

Extra information: ALG spreadsheet plan; ABRSC statement regarding citizen's petition at Acton STM.

Minutes Okayed

**2. Update on FY 16 and FY15 Year End**

**Glenn:** Not much new to report. He will present the first FY17 budget to the school committee on Nov. 19th.

Clare reported that the first quarter reports were in and the changes in the levels of state aid. FY 15 has closed. The final report is technically not closed until the end of October which spills over into November when it becomes official.

**Steve L:** there is not a lot to report. The town has started the FY17 budget process with the two day retreat on the hill. There is a committee within the town hall which works on the budget every Thursday.

**3. Spreadsheet**

**Steve B:** there is a new summary for the revenue recap projections. The model has the tax levy at 2.5% on the levy of \$75.2m which is \$1.9m. [Each ½ % = loss of \$380K of taxes; each 1% = \$760K of taxes] the model assumes taxing the \$985K of untaxed levy capacity from last year.

For state aid on the municipal side there is an estimate of 2.5% increase above FY16 level; ABRSD 1% increase above the FY16 level; meals tax is level.

Steve explained that since the meals tax was new, they felt it should be level funded until there was a history developed for possible expected increases. Under local receipts new growth has not been certified but there is an expectation of exceeding the FY 16 \$900K by \$200-\$400K. This will have a ripple effect throughout the budget. These are just the preliminary revenue numbers.

**Marie:** no decision has been made on the tax levy. That's usually done at our December meeting. These preliminary numbers are an attempt to get the information on paper. We know there are likely to be changes.

**4. Special Town Meeting**

Peter noted that 25% of the Kelley's Corner plan was done but the plans are not ready for the fall town meeting so will be moved to the annual town meeting in April. At that time there will be a request for 100% design funds at \$¾ million. There is the expectation of federal and state reimbursement.

Margaret said that the \$275K appropriated at the 2013 Town Meeting paid consulting fees and got to a 25% getting to 100% of the design moves the project into a TIP category. We need to spend the money to get the leverage [for the federal and state funds]

Kristina: The citizen's petition for the changes in school testing is article 1. The school committee has voted a statement (she distributed the statement).

The selectmen do not have any position on the petition but will discuss it at their meeting on Monday. Glenn noted that the board of education has not voted on PARC and the Common Core is not up for discussion. Kristina noted that she does have some concerns about PARC but feels it is not responsible to go against something that's required.

There was concern that the STM might take more than one evening and the second night will have to be on the 12<sup>th</sup>.

## 5. Revenue Projections

**Peter:** Local receipts for FY 16 seem to be higher than the actuals for FY 15 but it might be better to take the conservative route and use the FY 15 actuals.

**Marie:** Our take away is New Growth at \$900k and overlay at \$900k

**Mike:** I'm surprised at the good news and think we should take the conservative route

**Bart:** Shall we go with the \$900k? Silent agreement

**Marie:** Chapter 70 aid is 1% it will be going down [loss of school population] but we expect the minimum of \$25/per pupil. We have a new Governor, and do not know how he will treat education

**Margaret:** Is there any information on getting a higher rate for SPED students.

**Clare:** We will get the Foundation information at the end of November. There has been no discussion on changes in the formula. We would like to see higher reimbursement rates for health and SPED.

**Katie:** Will there be changes in the regional transportation at \$1,226k

**Clare:** for FY 15 it was \$1.353K but the cherry sheet still has the \$1226K and that's what we will use for the projection.

**Bart:** So the revenues are OK for now. Silent agreement

## 6. Override

Marie this is on the list because we would need to make the decision at this point if we were going for an override.

**Bart:** Agreement that there will not be an override? Another silent agreement

**Peter:** we are lucky to have the reserves as we use them to balance the budgets

**Mike:** Looking into the crystal ball we can see bumps in the future where we will need an override. There are many capital projects that are needed. That's why I think we need to appoint a capital committee to help shelter us from overrides in the future.

**Bart:** When do you want this committee formed?

There was a general discussion as to when the committee needed to be formed. Some thought that it should wait for the end of annual town meeting while others thought the committee needed to establish a methodology for how projects would be listed and a strategy as to how the funds would be raised. Projects included North Acton fire Station, Senior Center, needs for Minuteman Tech and the unknown needs for the ABRSD. There were questions as to what would make the list other than actual buildings. Steve L wanted to know if a \$750K fire truck would be added.

It was decided that Steve L and Glenn would meet and discuss the possible committee and the possible charge. There is also the question of Boxboro if the project is part of the region.

## **7. Recap of tri-board meeting**

All thought it was a valuable experience and one that should become an annual event

## **8. Public Comment**

Charlie Kadlec asked where the numbers shown on the spreadsheet came from.

Steve B said they were those that were the numbers from the warrant.

Mr. Kadlec suggested that there should be a reset to zero. Steve said that could be done but then there would be a "\$90m" surplus. Marie explained that the numbers would shortly change once the budgets were presented to the boards.

Peter was concerned that the request for Minuteman did not reflect the needs that the school would present for the construction of a new building. It was agreed that they had to wait for more information from Minuteman.

Bart asked if there were any pressing items for the agenda for the next meeting. It was decided to keep the November 17<sup>th</sup> meeting date as well as the December 10<sup>th</sup>. If the November date is not needed, the meeting will be cancelled.

Adjourned 8:25

Ann Chang



## Memorandum

To: Selectmen of Minuteman Voc & Tech Communities

From: Concord Select Board

**Re: Boxborough's Proposed Protocol for Adopting Regional Amendment; Bonding, and Withdrawing of October, 2015**

Date: November 10, 2015

The Concord Select Board discussed the Protocol proposed by Boxborough at its meeting on November 2, 2015 and this memorandum will summarize the consensus of the Board.

The Concord Select Board is not opposed in principle to the proposal for each District member town to vote in its 2016 annual town meeting on (1) amendment of the Minuteman Regional Agreement, (2) withdrawal of certain towns from the District, and (3) bonding of the new school building project. However, there are several important questions to which the Board would want authoritative and satisfactory answers before it could support the proposed Protocol.

These questions include:

1. On what date would the "Initial Procedure for Withdrawal" expire? How would district towns that wish to withdraw from MMRHS demonstrate their intentions to the other towns in time for the 2016 Annual Town Meeting cycles of the other towns, assuming that intention is codified in a certified copy of its own Town Meeting vote?
2. Could the timing result in District towns with ATMs earlier in the year having to vote on PA16 and debt authorization without knowing how many towns are left in the District and thus what its share of operating costs and debt would be? If so, would this be legally permissible?
3. Has the Commissioner of Education provided written endorsement of the proposal that approval of PA16 would also constitute approval of the withdrawal of Towns declaring their desire to withdraw pursuant to the Initial Procedure for Withdrawal? We understand that 603 CMR 41.03 discusses regional agreement amendments and withdrawals by towns from a district as separate, distinct decisions.
4. If withdrawal of town(s) from the District is not effective until July 1 of the year following approval by the Commissioner of PA16, but the unanimous vote by all District towns (including those withdrawing) approving bonding of the school building project is taken prior to that date, would that create uncertainty in the bond authorization? We understand that once bonding is

authorized under Mass General Laws Chapter 71 (d) or (n), the debt is then binding for member towns.

5. If there is uncertainty or confusion regarding the bond authorization, would that impact the District's efforts to commence bonding timely to take advantage of historic low interest rates? Is the market likely be concerned about potential uncertainty in the bond authorization and would that increase the cost of borrowing?
6. Would it be consistent with Chapter 71 (d) or (n) to have a provision in PA16 providing that any town withdrawing from the District pursuant to the Initial Procedure for Withdrawal would not be subject to continuing obligation for debt obligations on which it voted in the affirmative after voting for PA16, but prior to the effective date of its withdrawal?
7. Would the vote of a town to authorize borrowing made AFTER its vote to withdraw from the District be a vote with legal effect? How would this question impact bond authorization?
8. If one or more of the towns electing to withdraw from the District pursuant to the Initial Procedure for Withdrawal were to vote at its ATM (1) to approve PA16, (2) to withdraw from the District, and (3) NOT to approve the borrowing to build a new school, how would that impact the vote on the construction project? Could the District have a situation in which it has approved PA16, permitted several towns to withdraw from the District, AND does not have approval of a new building project?

These are the questions identified by the Concord Select Board after a brief review and discussion, and a brief consultation with legal counsel. There may well be more questions identified upon further reflection.

## **Protocol for Adopting Amended Agreement, Bonding, and Withdrawing**

1) Each Town that will have an article in its 2016 ATM Warrant asking if voters wish to withdraw from Minuteman Regional School District (**MM**) shall declare its intention to **MM**'s School Committee (**SC**) by (**TBD**) and request that it be named in the **Initial Procedure for Withdrawal** Section of the 2016 Proposed Amended Agreement (**PA16**) as discussed below.

2) By (**TBD**) **SC** shall draft **PA16** and circulate it to each of the member towns for inclusion in the Warrants for their respective ATM's for 2016. **PA16** shall include all provisions of the Proposed Amended Agreement dated March 11, 2014 (**PA14**), plus a new section entitled "**Initial Procedure for Withdrawal**" which shall include the following provisions:

a) A provision naming each declaring member town ("**Declarant**") that has given notice pursuant to paragraph 1 above;

b) A provision: (i) setting the date on which the **Initial Procedure for Withdrawal** shall expire and by which the Town Clerk of any **Declarant** may certify to **MM** that, at Town Meeting, the voters of that Town voted by a simple majority to withdraw from **MM**; and (ii) stipulating that any certification received after the **Initial Procedure for Withdrawal** expires shall be treated as a notice of desire to withdraw under the procedure set forth in **PA14**, Section IX;

c) A provision stipulating that a vote by any member town to adopt **PA16** constitutes approval by that member town of the withdrawal of any **Declarant** that has complied with the provisions of the **Initial Procedure for Withdrawal**;

d) A provision stipulating that approval of **PA16** by the Commissioner of Education shall constitute approval by the Commissioner, in accordance with 603 CMR 41.03(2), of the withdrawal of any **Declarant** that has complied with the provisions of the **Initial Procedure for Withdrawal**;

e) A provision stipulating that withdrawal of a **Declarant** shall become effective on July 1 of the year following approval by the Commissioner of **PA16**;

f) A provision stipulating that a **Declarant** withdrawing pursuant to the provisions of the **Initial Procedure for Withdrawal** shall be subject to the *Continuing Obligations After Withdrawal* set forth in **PA14**, Section IX (B), but only with respect to obligations incurred by the **Declarant** prior to its vote to approve **PA16**.

3) Each member town shall include in its 2016 ATM Warrant an article asking if voters approve:

a) **PA16**, and

b) A **Bonding Article** for borrowing to construct a new school building.

4) Each **Declarant** shall include in its 2016 ATM Warrant an article asking if voters approve:

a) **PA16**,

b) **Declaring** its desire to withdraw pursuant to the **Initial Procedure for Withdrawal**, and

c) A **Bonding Article** for borrowing to construct a new school building.



**Acton-Boxborough Regional School Committee**

16 Charter Road  
Acton, MA 01720  
978-264-4700 [www.abschools.org](http://www.abschools.org)

Community Preservation Committee  
Boxborough Town Hall  
29 Middle Road  
Boxborough, MA 01719

November 19, 2015

Dear Members of the Boxborough Community Preservation Committee,

We appreciate the opportunity to express our fervent support of the Acton-Boxborough Regional School District's application for Community Preservation Act funds to construct a Nature Play Space at Blanchard Memorial Elementary School.

This well-planned proposal would bring new recreation opportunities to students at Blanchard Memorial School, as well as the greater Boxborough community. With funds approved and construction already underway for the nature play spaces at the four Acton elementary sites, we very much hope to see the same opportunity for exploration come to fruition for the Blanchard community.

Thank you for your consideration.

Sincerely,  
Members of the Acton-Boxborough Regional School Committee:

Diane Baum

Brigid Bieber

Mary Brolin

Michael Coppolino

Amy Krishnamurthy

Maya Minkin

Paul Murphy

Kathleen Neville

Maria Neyland

Deanne O'Sullivan

Kristina Rychlik (Chairwoman)

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

14.1

Acton Special Town Mtg

11/10/15

Handed out @ meeting

**Amended Article**

Article # 1: To see if the town will adopt a non-binding resolution supporting the discontinuation of the Common Core State Standards (Common Core) and the associated testing known as PARCC (Partnership of Assessment of Readiness for College and Careers, or a rebranded version lacking local representation) within the Acton Boxborough Regional School District (ABRSD), and support the return to using the Pre-2011 Massachusetts standards in English Language Arts and Math and associated testing known as Massachusetts Comprehensive Assessment System (MCAS).

WHEREAS: The Commonwealth of Massachusetts has had the highest educational standards in the country for decades because of effective policy voted into law by our elected state representatives;

WHEREAS: The Acton-Boxborough Regional School District has been consistently rated as one of the best in the Commonwealth, and

WHEREAS: The Common Core State Standards and associated testing, Partnership for Assessment of Readiness for College and Careers (PARCC) have been implemented without parental input and threaten parental control of their children's education; and

WHEREAS: Education is most effectively handled at the local level, where teachers, administrators and parents can have direct control over school curriculum, frameworks testing, and policy.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. This Town Meeting opposes the use by the Acton-Boxborough Regional School District of Common Core and the associated testing known as PARCC.
2. This Town Meeting urges the ABRSD to discontinue the use of Common Core and PARCC and to return to the use of the Pre-2011 Massachusetts standards in English Language Arts and Math and associated testing, known as MCAS.
3. This Town Meeting is opposed to high-stakes standardized testing implemented more than what is currently required by MCAS.
4. This Town Meeting opposes the use of any state or federal high-stakes standardized testing unless such programs are reviewed and approved by the ABRSD School Committee with input from local teachers, administrators and parents.

## Original Article with Edits Highlighted

Article # 1: To see if the town will adopt a non-binding resolution supporting the discontinuation of the Common Core State Standards (Common Core) and the associated testing known as PARCC (Partnership of Assessment of Readiness for College and Careers, or a rebranded version lacking local representation) within the Acton-Boxborough Regional School District (ABRSD), and support the return to using the Pre-2011 Massachusetts standards in English Language Arts and, Math, Science/Technology, and History/Social Science and associated testing known as Massachusetts Comprehensive Assessment System (MCAS).

WHEREAS: The Commonwealth of Massachusetts has had the highest educational standards in the country for decades because of effective policy voted into law by our elected state representatives;

WHEREAS: The Acton-Boxborough Regional School District has been consistently rated as one of the best in the Commonwealth, and

WHEREAS: The Common Core State Standards and associated testing, Partnership for Assessment of Readiness for College and Careers (PARCC) have been implemented without parental input and threaten parental control of their children's education; and

WHEREAS: Education is most effectively handled at the local level, where teachers, administrators and parents can have direct control over school curriculum, frameworks testing, and policy.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. This Town Meeting opposes the use by the Acton-Boxborough Regional School District of Common Core and the associated testing known as PARCC.
2. This Town Meeting urges the ABRSD to discontinue the use of Common Core and PARCC and to return to the use of the Pre-2011 Massachusetts standards in English Language Arts and, Math, Science/Technology, and History/Social Science and associated testing, known as MCAS.
3. This Town Meeting is opposed to high-stakes standardized testing implemented more than what is currently required by MCAS, twice per year for grades 3-8, and 10, not to exceed 4 days per year of mandatory testing, except for grades 5, and 8 and 10, which may have one additional day of testing, and grade 10, which may have 7 days of testing.
4. This Town Meeting opposes the use of any state or federal educational programs or testing-high-stakes standardized testing unless such programs are reviewed and approved by the ABRSD School Committee with input from local teachers, administrators and parents.
5. This Town Meeting opposes the adoption of any educational programs linked to potential funding sources.

***Acton-Boxborough Regional School Committee Statement***

Regarding Citizens' Petition at Acton Special Town Meeting on 11/10/15  
(11/5/15)

The Acton-Boxborough Regional School Committee has been asked to comment on the Citizens' Petition being brought to the town of Acton as a non-binding resolution at a Special Town Meeting planned for November 10<sup>th</sup>.

While the Committee appreciates the interest, concern and involvement of parents and community members in support of this petition, we are unfortunately unable to support this petition as written for a number of very specific and valid reasons. We do realize that although it must seem ironic, given our committee's stance against PARCC as it has evolved, we still must oppose this Citizens' Petition as written.

First, we as a board and district have very specific concerns about the accuracy of numerous claims within this petition<sup>i</sup>. In addition, we disagree with the petitioners' view of the financial impact of this petition<sup>ii</sup>. Those concerns are specifically detailed following this statement.

Secondly, we are concerned about the process and approach being employed by the proponents. As a committee we have spent a great deal of time in recent years on the subject of standardized testing and have taken the time on numerous occasions to make our position known to our legislators and the Board of Elementary and Secondary Education (BESE). Those are activities we feel have been thoughtfully considered by members of both communities and were designed to influence those in a position to affect real change. When we advocate for change, we make a deliberate effort to speak as one region. In this case, when we as a regional district are asked to accept a non-binding resolution recommended by constituents from only one of our towns, we believe there is a perceived loss of cohesion in the message any action may send.

The BESE is set to vote on the choice of MCAS or PARCC on November 17th; in preparation for that vote, we as Committee members attended public forums, met with legislators and wrote letters summarizing a great deal of thought and discussion. While the results of this Special Town Meeting vote may make it to those decision-makers in advance of November 17th, we feel that the petition as written is off message from that particular vote.

Lastly, as a regional district shared with our neighboring town of Boxborough, we find ourselves in the uncomfortable position of having been asked to take direction from members of only one of our towns that would impact all of our students. We have been told by one of the petitioners that there have been no similar efforts made in the town of Boxborough.

1. Para 1: Common Core (CC) and PARCC are lumped together here but we as a district and committee have separated those issues and feel differently about each.
2. Para 1: We are currently using 2006 Science/Technology/Engineering (STE) Frameworks that are not part of Common Core State Standards (CCSS). The new MA STE framework draft is due for public comment this fall, and these frameworks are based on the Next Generation Science Standards (NGSS), which are not part of the CCSS. We are currently using the 2003 History and Social Science Framework, also not part of CCSS. CCSS refer to just ELA and Math.
3. Para 3: We have been using CCSS since 2011, the same year the petition cites our district as being consistently highly rated.
4. Para 4: CCSS were adopted in a public process, for which the Department of Elementary and Secondary Education (DESE) released draft standards for public comment in May 2010.
5. Para 5: We control our curriculum on the local level, and we follow federal law and state regulations regarding testing.
6. #2: We are not yet using PARCC and the state will vote Nov. 17 to choose PARCC or MCAS. The standards the District uses and how they are referenced incorrectly has been mentioned.
7. #3 MCAS testing already exceeds this number of testing days; for example, 10<sup>th</sup> grade ELA is 2 days for 3 sessions of reading and one of writing, 10<sup>th</sup> grade math is two days for two different sessions, and STE is 2 days for 2 different sessions. 7 days total. In addition, item three refers to standardized testing where in actuality the petitioners likely mean high-stakes standardized testing. As written, this limits the vast majority of testing that happens in schools. A "standardized test" is any test where students answer the same questions and it is scored in a standard way to compare results.
8. #4 It is unclear what is meant by "the use of any state or federal educational programs" and testing is governed by federal law and state regulations not the School Committee (SC). It is the SC job to develop the budget, develop policy and oversee the Superintendent.
9. #5 We as a district receive a great deal of money from various grants such as Title III for ELL students, Title I for improving the Academic Achievement of the Disadvantaged, and other Entitlement grants. Those provide money to directly serve our students. This is funding that we cannot do without.
10. Summary: The Common Core State Standards effort was led by the National Governors' Association and the Council of Chief State School Officers, all of whom are state leaders.
11. The last statement in the second summary paragraph does not include standards or assessment...and to be clear, the terms standards and curriculum are not synonymous. Curriculum is defined as a combination of knowing the standards, knowing the available materials, knowing your students, knowing the assessment practices and having a deep knowledge of



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instructional practices. Curriculum is not something you could buy off the shelf or have foisted upon you. We control our curriculum locally here at Acton-Boxborough.

<sup>ii</sup> Lastly, the authors of the petition were at a recent Acton Finance Committee meeting, speaking to the financial impact of their petition. The petitioners cited four reasons to support their position:

1. Too much technology
2. Privacy concerns
3. Loss of local control
4. Expense

Regarding these points:

1. We have taken a very slow organic approach to technology overall in our district, both to manage the costs and maximize impact. 2. We believe concerns about privacy and security of student test data would be best addressed with the BESE and DESE. 3. As previously explained, we have control over what matters...our curriculum. 4. We currently are well prepared to implement a standardized computerized assessment should we need to, and would not need to purchase additional hardware for such purposes.



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TO: Dr. Glenn Brand, Superintendent  
FROM: Deborah Bookis, Director of Curriculum and Assessment  
DATE: November 11, 2015  
RE: Report on Professional Learning Day, November 3, 2015

The second Professional Learning Day for the 2015-2016 school year was designed to include all staff of the Acton-Boxborough Regional School District and to focus on our district goal: ***To solidify our district commitment, PreK -12, to the social and emotional well-being of our students and staff and the promotion of a healthy, balanced life in a district with high expectations and high achievement.***

The day was organized into the following three distinct sections, each with its own structure and outcomes.

#### ***Mental Health – Early Morning Session – State of the District***

1. To understand the current mental health challenges of our students & families, PreK-12
2. To understand the current efforts, resources, and programs already in place in our schools, PreK-12

During this session, Todd Chicko, Chairperson, Secondary Counseling/Psychological Services; Hilary Bonnell, Chairperson, Elementary Counseling/Psychological Services; and Diane Spring, Chairperson, Elementary Nursing Services (in collaboration with School Physician, Dr. Jessica Rubenstein) shared district data regarding student mental health and wellness. Patty Higgins, Community Needs Assessment Chair, AB United Way, then presented a summary of their most recent community assessment, “A Glimpse into Our Community.” After Dr. Brand reviewed a handout (please see attached document) detailing the many structures, programs and initiatives in place at ABRSD, Joe Gibowicz, Early Childhood Coordinator/Preschool Services, provided further information about the “Ready to Learn” initiative for PreK and Kindergarten, and Beth Baker, ABRHS Associate Principal, provided information about the high school initiative, “Making Caring Common.”

#### ***Wellness – Late Morning Session – Workshops***

3. To model/learn wellness strategies for us (and have fun!)

This session provided all participants the opportunity to try, practice, learn or model a wellness strategy . . . and to have fun doing so! All workshops took place either in or on the grounds of the ABRHS. Over twenty-five different workshops were offered, ranging from learning to fly cast to yoga, hand drumming, expressive drawing, mindfulness practices and Zumba. Some workshops

were participatory while others were more informational. Staff registered for their preferred workshops ahead of time through the online tool, Sign-up Genius. Guest consultants and over thirty of our own staff facilitated these workshops.

**Learning – Afternoon Session – Panel Discussion**

- 4. To understand the impact of mental health challenges and related factors on learning
- 5. To learn strategies or resources we can take back to our respective schools and our work with students

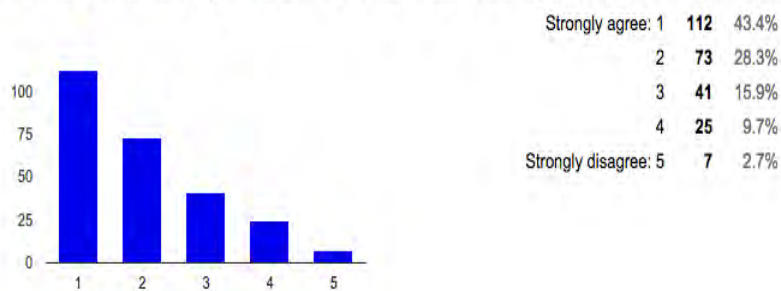
This last session was organized as a panel presentation and discussion. The following ABRSD staff and community guests presented their area of expertise, the impact on student learning, and then provided some strategies for staff to use in their work with students. Upon conclusion of the panel presentation, time was set aside for staff to ask questions.

School Refusal	Maureen Keegan, Program Administrator, Colebrook High School
Families in Crisis	Bill Gresser, LMHC, LMFT, Mental Health Counselor
Substance Abuse	Martha Frost, Counselor, ABRHS
Anxiety & Depression	Susan Root, Counselor, ABRHS
Sleep	Kirsty Kerin, Sleep Expert and Boxborough Parent
Housing	Nancy Kolb, Acton Housing Authority

Approximately nine hundred staff attended the early morning session. Close to seven hundred participated in the workshop sessions and attended the afternoon session. Staff had the choice to either bring their lunch or purchase one from the café. Our own Food Services Department provided terrific grab-and-go lunch items, coffee and breakfast treats, and snack stations located throughout the school. Student volunteers helped us compost and recycle our lunch items and provided direction to workshop locations. Many thanks also go to the Facilities Department for their help with the day’s set-up and clean up and to the following staff for their incredible behind the scenes support: Kate Crosby, Brendan Hearn, Dan Drinkwater, Larry Dorey, Peggy Harvey, Anne Vlajinac, and Beth Petr.

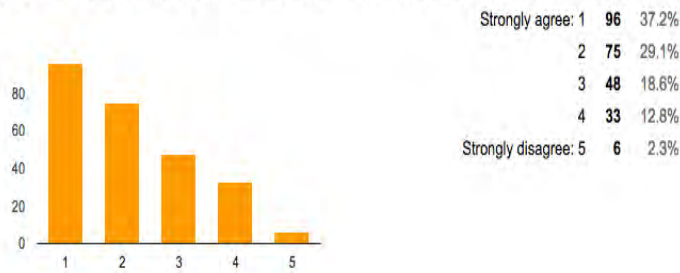
The following graphs and statements summarize the feedback provided by the two hundred and fifty-eight staff who completed the feedback form.

**I have a better understanding of the current mental health challenges of our students and families PreK-12.**



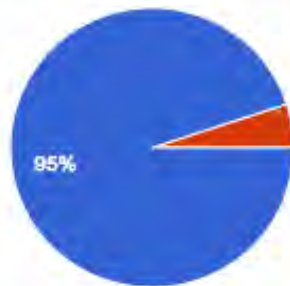
About 88% of participants either somewhat agreed, agreed, or strongly agreed that they now have a better understanding of the current mental health challenges in the district.

**I have a better overall view of the current efforts, resources, and programs already in place in our schools PreK-12.**



About 85% of participants either somewhat agreed, agreed, or strongly agreed that they now have a better overall view of the efforts, resources, and programs in place.

**I had an opportunity to try, practice, learn, or model a wellness strategy.**



yes 245 95%  
no 13 5%

***Feedback about the workshops was overwhelmingly positive.***

**Positive Psychology:** This was great. The presenters introduced the topic and explained the importance of a positive outlook on most aspects of life. They tied the topic into our strategies with students (as well as everyone else we interact with) and gave us some concrete tools to encourage a more positive attitude.

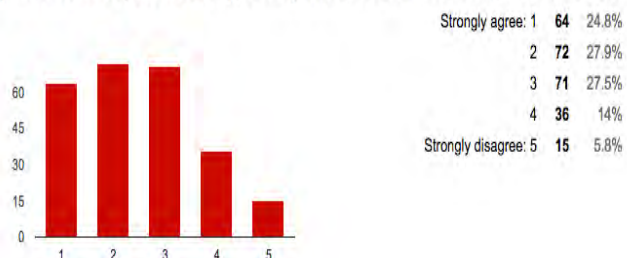
**Knitting:** I really enjoyed the community feel of this workshop and the chance to meet and connect with other teachers in a relaxed and creative setting.

**Walking on the Track:** It was great to not have to listen to anyone speak, just get out, get moving, and reconnect with colleagues. I felt refreshed afterwards!

**Coloring** was so relaxing! I knew I enjoyed coloring, but now I will really make an effort to make time to do it routinely.

**Yoga with John** was amazing! He not only guided us through the meditative poses but gave brief explanations about the theory and practice... music was soothing ... importance was significant! As one of the panel members expressed, "We walked the walk." I couldn't agree more!

**The panel discussion provided the opportunity to better understand the impact of mental health and related factors on learning.**



About 80% of participants either somewhat agreed, agreed, or strongly agreed that the panel discussion provided an opportunity to better understand the impact of mental health and related factors on learning.

## ***Strategies or Resources You Can Use with Students***

The following statements are representative of the comments made.

I have already shared with my students some of the suggestions from our Science of Sleep expert. In addition, in light of Tuesday's work, I have returned to a previous practice of beginning class with 30-60 seconds of silence to allow students a chance to be still.

I think re-enforcing the can-do attitude with students is very important. Also trying to model a positive attitude is super important and doable, by body language, expression, open mindedness.

Helping students connect and not feel alone in their struggles. I see students with anxiety issues all the time, and I think developing a relationship with them and showing you care helps a lot.

Utilizing the outside resources we have available. Some of the breathing used in the yoga class.

Better understanding of depression and anxiety . . . I am more equipped to support

I will stress to students the importance of sleep and the benefits. I will include more movement in the classroom.

## ***List a couple of ideas the district should consider for supporting students' mental health, wellness and learning***

Many ideas were shared under the following categories:

- School/Class Structures, Schedules and Procedures
- Recess, Play, Movement or PE
- Personnel Support
- Transportation
- Start Time
- Engage Families/Community
- Homework
- More Events Like Today (and include students)
- Assessment
- Curriculum/Instruction
- Engaging Our Students
- Connect with Other Districts
- Resources for Staff
- Messaging
- Drugs
- Technology
- First Steps/Next Steps . . .
- Initiatives

## ***Provide any helpful feedback about the structure/format of the Professional Learning Day***

The majority of the comments focused on the length of the afternoon panel (it was too long) and the amount of information presented (too much with no time for processing). In future planning, this provides us the opportunity to rethink how we can use time and space within the building to better meet the needs of our staff. Upon reflection, smaller afternoon sessions, with time for discussion and mini-breaks, would have better served our goals and our staff. Additionally, in the future, we will use a different registration tool as the free Sign up Genius tool did not allow certain functions that would have been helpful (i.e., printing a list of participants for each facilitator), and it was quite cumbersome from the creator perspective.

Overall, the day was well received and enabled us to provide the same information to all ABRSD staff, thus laying the foundation for discussions, and strategy and structure development to support our learning community.





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**Glenn A. Brand, Ed.D.**  
*Superintendent of Schools*

**To: Acton-Boxborough Regional School Committee**

**From: Glenn A. Brand**

**Date: November 17, 2015**

**Re: Administrative Compensation Ad Hoc Committee**

As you know, one of the primary functions and responsibilities of the School Committee is to establish a budget for the operations of the district. In connection with this, one of the responsibilities of the Superintendent of Schools is to establish salaries for administrators. Based upon these two important functions, I provide for your consideration a proposal that I believe can enhance both roles respectively in this area.

Currently, the Acton-Boxborough Regional School District does not have in place any formal mechanism for providing guidance to the Superintendent on approved levels of compensation for administrators. It is advisable that we implement a process that allows for a clear and transparent methodology in which the Superintendent of Schools is provided guidance on what salary and compensation ranges he/she can provide to contracted administrative positions.

I outline the recommendation below as well as provide you with two key benefits from this proposal. With your support, I will seek two (2) volunteers from the current members of the Budget Subcommittee at our next regularly scheduled meeting on November 23.

### ***Recommendation***

I am recommending that the School Committee budget subcommittee appoint two members to assist the Superintendent in compiling and reviewing salary data from agreed upon "comparable" communities for job-alike positions. I am proposing that this ad hoc committee consists of four individuals:

- Two volunteers from the School Committee's Budget Subcommittee with one (1) representative from Acton and one (1) from Boxborough
- Director of Human Resources
- Superintendent of Schools

*Our Mission is to prepare all students to attain their full potential as life-long learners, critical thinkers, and productive citizens of our diverse community and global society.*

This ad hoc committee would make recommendations for salary ranges to the School Committee for respective positions. Once the School Committee approves a set of salary ranges, the Superintendent of Schools, consistent with *Article 3 ('Salaries')* of the *Acton-Boxborough Regional School District Administrators' Benefits Manual*, shall continue to hold discretion in determining each individual administrator's salary based upon qualifications, experience and educational background but within the agreed upon ranges.

### ***Benefits of this Process***

There are a number of perceived benefits that would come from this process, including:

*i) Transparency*

Having an ad hoc committee regularly review data from comparable communities and establish salary range recommendations affords the Committee the ability to better realize their role in establishing a budget for the district which includes administrator salaries in a public transparent way in the same way that negotiated contracts are. In addition, it would provide members of the current administration, as well as prospective administrators applying for open positions, with insight into what the specific salary ranges are that have been established for their positions.

*ii) Maintains the District's Competitiveness*

Ensuring that there is a regular process in place that reviews and monitors compensation levels for similar positions in agreed-upon comparable communities holds the best opportunity for the School Committee to establish where, from a competitive standpoint, it wants to be. This in turn serves an important function in attracting and retaining current and future administrators.

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16.

Glenn A. Brand, Ed.D.  
Superintendent of Schools

To: Acton-Boxborough Regional School Committee Members  
From: Glenn A. Brand  
Date: 11/3/15  
Re: Senior Leadership Administrative Restructuring Proposal

Just prior to my arrival in the school district a little over a year ago, it became clear that there was interest by a number of stakeholders in having consideration given to re-establishing an assistant superintendent position in the district. Stakeholders included members of the administration as well as some members of the School Committee.

I appreciated the fact that I would be given the opportunity of time to further consider this suggestion as I sought to learn more about our current leadership structure, the recent history of the district, a review of what other comparable school districts have in place for this structure and the chance to get to know those staff we currently have in place amongst our leadership team. Ultimately, such a decision is an important one and I did not want to rush to any decision that would impact the future direction of the district.

After much thought and consideration, I have developed a set of recommendations that I now provide to you for your consideration. While the recommendations that are included in this proposal are budget neutral (i.e. they represent a change in title and some responsibilities but no change in the total number of FTEs) there is a connection in the timing of these recommendations as it relates to the upcoming leadership search within the Pupil Services Department for the 2016-17 school year. Given that these recommendations fall under Massachusetts General Law they necessitate the direct involvement of the School Committee as the appointing authority.

**Key Recommendations of the Restructuring Proposal:**

I am making three (3) recommendations that pertain to the senior administration of the district:

- i. Restructure the position of *Director of Pupil Services* and reclassify it to the *Assistant Superintendent for Student Services*.
- ii. Restructure the position of *Director of Curriculum and Assessment* and reclassify it to the position of *Assistant Superintendent for Teaching and Learning*.
- iii. Restructure the position of *Director of Personnel and Administrative Services* and reclassify it to the position of *Assistant Superintendent for Operations*.

### **Benefits of Recommendations:**

While I will outline the benefits that I see from each recommendation in greater detail below, it is my belief that some of the overarching benefits of both reclassifying and restructuring provides the following benefits:

*i. Alignment of Administrative Structure*

Currently, the district has a number of senior and midlevel administrators that are asked to oversee a wide-variety of services within the district. This restructuring will allow for the greater alignment of departments by connecting these around a more centralized structure.

*ii. Serves to Attract Highly Desirable Candidates*

It is imperative that our district remains in a position where we are able to attract and retain highly qualified candidates in all of our positions. This is no less true than within the leadership of the district. Reestablishing the position (s) of assistant superintendent increases our ability to attract potential candidates in two ways. First, it necessitates that an individual hold the licensure for assistant superintendent/superintendent and that, as a result, any potential candidate should hold some degree of requisite skills, knowledge and experience and/or training to serve as a district level leader.

Second, it will serve to increase the possibility of our district being able to attract candidates for whom this title and designated role matters. For some candidates who might be on a career path towards a future role in service as school superintendent or other senior level leader, the opportunity to pursue an assistant superintendent position could indeed make the difference in the pool of candidates that we can attract. A significant example of this is that it could allow us to attract candidates from other districts in similar roles but who are seeking career advancement to a district such as ours. The designation of assistant superintendent to some does matter and the absence of the title might prevent potential candidates from coming to Acton-Boxborough because a director position could be seen as a lateral move. In an environment in which there is already a dearth of highly qualified and experienced candidates, this type of reality can have an impact on our ability to attract candidates.

### **Timeline:**

It is my intention to make this presentation to the School Committee and outline these recommendations at your regularly scheduled meeting on November 5. Based upon the consideration of feedback gathered, I would then return to provide follow-up information as might be needed at your regularly scheduled meeting on November 19 with the hopeful action on the Committee's part to approve this recommendation. Ideally, a vote to support the recommendations would then come at either that meeting or on December 3 at the latest.

## BACKGROUND INFORMATION IN SUPPORT OF THE PROPOSAL

### History Within the District

The district has witnessed a number of changes to the senior administrative structure of ABRSD over the last two decades involving assistant superintendent positions. In the early 1990s, during the tenure of Superintendent Isa Zimmerman (1993-2000), the district had two such positions that included an Assistant Superintendent for Finance and Operations and an Assistant Superintendent for Curriculum and Personnel.

Under Superintendent Bill Ryan (2000-2009) the district transitioned to a Deputy Superintendent along with an Assistant Superintendent of Curriculum and Instruction.

Most recently, under Superintendent Steve Mills (2009-2014), the district transitioned to all 'director' positions and eliminated the title of assistant superintendent.

### Consideration of Comparable School Districts

Similar to so many other facets of a school district's operation that allow for variations in structure, it is often difficult to truly compare one district with that of another. However, in an effort to provide some insight into the senior leadership structures in other districts I have gathered information about the positions in 13 of our 17 "comparable communities."

<b>Concord - Carlisle</b>  <i>Deputy Superintendent for Finance &amp; Operations</i>  Director of Human Resources  Director of Special Education  Director of Teaching & Learning	<b>Dedham Public Schools</b>  <i>Assistant Superintendent of Curriculum, Instruction and Assessment</i>  <i>Assistant Superintendent of Business and Finance</i>  Director of Special Education	<b>Hingham Public Schools</b>  <i>Assistant Superintendent</i>  Director of Student Services  Director of Business and Support Services
<b>Marblehead Public Schools</b>  <i>Assistant Superintendent Curriculum &amp; Instruction</i>  School Business and Finance Administrator	<b>Milton Public Schools</b>  <i>Assistant Superintendent for Curriculum &amp; Personnel</i>  <i>Assistant Superintendent for Business Affairs</i>  Administrator of Pupil Personnel Services	<b>Sudbury Public Schools</b>  <i>Assistant Superintendent (Curriculum, Instruction and Technology)</i>  Director of Business & Finance  Director of Human Resources  Student Services Director

<p><b>Westford Public Schools</b></p> <p><i>Assistant Superintendent of Curriculum &amp; Instruction</i></p> <p>Director of Pupil Services</p>	<p><b>Weston Public Schools</b></p> <p><i>Assistant Superintendent Curriculum &amp; Instruction</i></p> <p><i>Assistant Superintendent Finance &amp; Operations</i></p> <p>Director of Student Services</p> <p>Assistant Director of Student Services</p>	<p><b>Wilmington Public Schools</b></p> <p><i>Assistant Superintendent for Curriculum and Professional Development</i></p> <p>Director of Special Education</p> <p>Director of Administration &amp; Finance</p>
<p><b>Winchester Public Schools</b></p> <p><i>Assistant Superintendent</i></p> <p>Director of Finance</p> <p>Director of Personnel</p> <p>Administrator of Special Education</p>	<p><b>Nashoba Valley Regional School District</b></p> <p><i>Assistant Superintendent of Schools</i></p>	<p><b>Reading Public Schools</b></p> <p><i>Assistant Superintendent Learning &amp; Teaching</i></p> <p>Director of Finance &amp; Operations</p> <p>Director of Student Services</p>
<p><b>Wellesley Public Schools</b></p> <p><i>Assistant Superintendent for Finance &amp; Operations</i></p> <p><i>Assistant Superintendent of Curriculum &amp; Instruction</i></p> <p>Director of Student Services</p> <p>Director of Human Resources</p>		

Additional information is provided below in consideration of a number of other districts that have 'similar' sized populations in the state.

District	Student Size/ # of Schools	Senior Administrative Positions
Franklin Public Schools	5600/10	<p>Assistant Superintendent of Schools</p> <p>Assistant Superintendent for Teaching &amp; Learning</p> <p>Director of Student Services</p> <p>School Business Administrator</p> <p>Human Resource Director</p>

Brookline Public Schools	7500/10	<p>Deputy Superintendent for Administration &amp; Finance</p> <p>Deputy Superintendent for Teaching &amp; Learning</p> <p>Deputy Superintendent for Student Services</p> <p>Special Assistant to the Superintendent for Strategy &amp; Performance</p>
Lexington Public Schools	6860/9	<p>Assistant Superintendent for Human Resources</p> <p>Assistant Superintendent for Curriculum, Instruction &amp; PD</p> <p>Director of Finance &amp; Operations</p> <p>Director of Special Education</p> <p>Assistant Director of Special Education</p>
Wellesley Public Schools	5000/9	<p>Assistant Superintendent for Finance &amp; Operations</p> <p>Assistant Superintendent of Curriculum &amp; Instruction</p> <p>Director of Student Services</p> <p>Director of Human Resources</p>
Plymouth Public Schools	7700/12	<p>Assistant Superintendent Administration &amp; Instruction</p> <p>Assistant Superintendent Human Resources</p> <p>School Business Administrator</p> <p>Special Education Director</p>
Andover Public Schools	6000/10	<p>Assistant Superintendent Finance &amp; Administration</p> <p>Director of Human Resources</p> <p>Director of Student Services</p> <p>Assistant Director of Student Services</p>
Framingham	8000/13	<p>Chief Academic Officer</p> <p>Chief Human Resource Officer</p> <p>Assistant Director of Human Resources</p>

		Chief Operating Officer Director of Finance Director of Curriculum
Shrewsbury	6000/7	Assistant Superintendent for Curriculum & Instruction Assistant Superintendent for Operations & Finance Director of Human Resources Director of Special Education & Pupil Services

### Compensation

These recommendations do not directly impact compensation levels or the budget. There is no net change in FTEs nor direct change in salary as a result of this proposal. However, regardless of job titles, it is my belief that you will expect me to continue to regularly review compensation levels for "similar" positions from surrounding "comparable" school districts. I believe that regardless of any specific title, it is my responsibility to establish compensation levels that are competitive and appropriate for similar roles given the critical importance of situating the district to remain competitive in attracting and retaining highly competent administrators. Thus, any more immediate or long-term adjustments to the compensation of these individual leadership positions will be as a direct result of these types of comparisons and not due to any change in title only.

In the near future I plan to present to the Committee a proposal for how we might engage collaboratively in this important work of setting salary ranges that I can work with in establishing contracts for all of our administrators that are fair, reasonable and competitive in relationship to those 'comparable' school districts that we align ourselves with.

### Connection with the Massachusetts General Law

While these recommendations would result in a neutral change in the overall administrative staffing of the district, any restructuring that by definition brings about the creation of a position identified as *Assistant Superintendent* results in a change in the appointing authority under Massachusetts General Law which in turn necessitates the School Committee's approval.

**Per MA General Law:** The school committee is responsible for appointing personnel to the following positions:

- a. *Superintendent:* The school committee has the power to select and terminate the superintendent, and to establish his or her compensation. (G.L. c. 71, [[section]] 37)

- b. *Assistant or associate superintendents*: On the recommendation of the superintendent, the committee may establish the positions of and appoint assistant or associate superintendents, who shall report to the superintendent. The superintendent recommends to the school committee candidates for appointment to the position of assistant or associate superintendent. The committee shall approve or disapprove the appointment, but shall not unreasonably withhold its approval. If the superintendent requests, the committee shall explain its disapproval of a recommended candidate. The committee sets the compensation of the superintendent and the assistant or associate superintendents. (G.L. c. 71, [[section]] 59)
- c. *School business administrator; administrator of special education; school physicians and registered nurses; supervisors of attendance; legal counsel*: The Education Reform Act did not change several pre-existing statutes that refer to the school committee appointing certain personnel. G.L. c. 71, [[section]] 41 states that "a school committee may award a contract to ... a school business administrator for a period not exceeding six years... ." G.L. c. 71B, [[section]] 3A states that "a school committee ... shall appoint a person to be its administrator of special education." G.L. c. 71, [[section]] 53 says, "The school committee shall appoint one or more school physicians and registered nurses..." G.L. c. 76, [[section]] 19 says, "Every school committee shall appoint, make regulations governing and fix the compensation of one or more supervisors of attendance."

## PROPOSED RESTRUCTURING

It is my recommendation that the School Committee consider restructuring a number of positions associated with the senior leadership of the district. After carefully reviewing and considering our needs as a district, the personnel we currently have in place and what I believe would be in the best interests of the district, I am proposing the following recommendations.

### Recommendation I - Reclassification of Director of Pupil Services to Assistant Superintendent for Student Services

- Eliminate the Director of Pupil Services position (1.0 FTE)
- Create the position of *Assistant Superintendent for Student Services* (1.0 FTE) and post this position for the upcoming search to fill the open position.
- In addition, support the renaming of the department from the *Department of Pupil Services* to the *Department of Student Services*.

I believe that this recommendation is supported by the following:

- i. *Clarifies the reporting structure within the department*
- ii. *Enhances the opportunity to attract a wider array of candidates*
- iii. *Formalizes A Leader's Responsibility to Social Emotional Well-Being & Special Projects in the District Connected with Students*
- iv. *Clearly identifies the line of authority for the district's operations in the absence of the Superintendent to the team of Assistant Superintendents.*

Within the department we now have an extensive range of positions throughout the district that include directors and coordinators. The establishment of the position of assistant superintendent qualifies the reporting structure and formalizes one senior leader for the entire

department throughout the entire district who oversees the broad range of services connected to our entire student body.

With the recent creation of the position of *Director of Special Education* during the 2014-15 school year, the district now is fully compliant with the law and has in place a dedicated and licensed administrator to oversee the day-to-day delivery of Special Education services.

Given that the district has tied the Special Education licensure to the role of Director of Special Education, this provides greater flexibility in allowing the district to attract and appoint candidates that may not have Special Education licensure alone.

The district has placed considerable emphasis upon the importance of social and emotional well being of students. Currently, we lack the assigned responsibility of a leader within the district to work with our schools and principals in supporting and coordinating these efforts and programs district-wide.

In addition, there are often special projects and assignments that are connected with students and/or programs that emerge and require coordination and leadership that are beyond the scope of curriculum, teaching, learning or the various operational services within our district. These types of 'special' projects would become the responsibility of this person.

v. *Changes to Reporting Structure & Responsibilities*

Currently, the Director of Pupil Services oversees a total of six (6) reports as detailed in the table below. In an effort to more closely align all of those services that link closely with our students, I am proposing to add three areas of responsibilities that include the Kindergarten program, student registration and a formalized identification of this person to oversee all programming aspects of the social and emotional well-being of our students. This includes not only Community Education programming but also the district's focus on the social and emotional well being of students. The reporting structure and responsibilities outlined below are currently tentative and could change and/or evolve over time depending upon a consideration of the overall needs of the district.

<i>Direct Reports</i> (6)	<i>Current Areas of Responsibility for the Director of Pupil Services</i>	<i>Direct Reports</i> (7)	<i>Proposed Areas of Responsibility for the Assistant Superintendent of Student Services</i>
Director of Special Education (1)  Counseling/ Psychology Chairperson (7-12) (1)  Health/Nursing	Special Education  Early Childhood/Pre-School  Counseling Services	Director of Special Education (1)  Counseling/ Psychology Chairperson (7-12) (1)  Health/Nursing	Early Childhood/Preschool  Counseling Services  Guidance Services  Health & Nursing



Chairpersons (2)  Counseling Chairperson (K-6) (1)  ELL Chairperson (1)	Guidance Services  Health & Nursing	Chairpersons (2)  Counseling Chairperson (K-6) (1)  ELL Chairperson (1)  <u>Plus</u>  Director of Community Education (1)	<i>Newly Proposed</i>  Kindergarten  Community Education  Social Emotional Learning  Special Projects
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**Recommendation II - Reclassification of Director of Curriculum and Assessment to Assistant Superintendent for Teaching and Learning**

- Eliminate the position of Director of Curriculum and Assessment (1.0 FTE)
- Create the position of *Assistant Superintendent for Teaching and Learning* (1.0 FTE) and approve the appointment of Ms. Deborah Bookis to this role.

I believe that this recommendation is supported by the following:

- Formalizes the broader responsibilities and authority of directing all aspects of teaching and learning throughout the district.*
- Incorporates a direct linkage with the educational technology planning in the district.*
- Clearly identifies the line of authority for the district's operations in the absence of the Superintendent to the team of Assistant Superintendents.*

The reporting structure and responsibilities outlined below are currently tentative and could change and/or evolve over time depending upon a consideration of the overall needs of the district.

<i>Direct Reports</i> (6)	<i>Current Areas of Responsibility for the Director of Curriculum &amp; Assessment</i>	<i>Direct Reports</i> (7)	<i>Proposed Areas of Responsibility for the Assistant Superintendent for Teaching &amp; Learning</i>
K-6 ELA/Social Studies Curriculum Specialist (1)  K-6 Math Curriculum Specialist (1)  K-6 Science Curriculum	PreK-12 Curriculum Development  Professional Learning  Standardized Testing	K-6 ELA/Social Studies Curriculum Specialist (1)  K-6 Math Curriculum Specialist (1)  K-6 Science	PreK-12 Curriculum Development  Professional Learning  Standardized Testing

Specialist (1) K-12 Visual Arts Director (1) K-12 Performing Arts Director (1) K-12 P.E. Chairperson (1)		Curriculum Specialist (1) K-12 Visual Arts Director (1) K-12 Performing Arts Director (1) K-12 P.E. Chairpersons (1)  <u>Plus</u>  Director of Educational Technology (1)	Educational Technology
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**Recommendation III - Reclassification from Director of Personnel and Administrative Services to Assistant Superintendent for Operations.**

- Eliminate the position of *Director of Personnel and Administrative Services* (1.0 FTE)
- Create the position of *Assistant Superintendent for Operations* (1.0 FTE) and approve the appointment of Ms. Marie Alteri to this role.

I believe that this recommendation is supported by the following:

- Formalizes the broader responsibilities and authority of directing all aspects of personnel, and related operations of the district.*
- Allows the future opportunity to realign the student enrollment function to Student Services and works closely with bridging the finance and Human Resources and operations departments.*
- Clearly identifies the line of authority for the district's operations in the absence of the Superintendent to the team of Assistant Superintendents.*

The reporting structure and responsibilities outlined below are currently tentative and could change and/or evolve over time depending upon a consideration of the overall needs of the district.

<i>Direct Reports</i> (6)	Current Areas of Responsibility for the Director of Personnel & Administrative Services	<i>Direct Reports</i> (6)	Proposed Areas of Responsibility for the Assistant Superintendent of Human Resources & Operations
Personnel Budget Manager (1)  Benefits Administrator	Personnel  Employee Benefits	Personnel Budget Manager (1)  Benefits Administrator	Personnel  Employee Benefits

<p>(1)</p> <p>Personnel Assistants (2)</p> <p>Elementary Registrar (1)</p> <p>Director of Food Services (1)</p>	<p>Personnel Budget &amp; Monitoring</p> <p>Food Services</p> <p>Elementary Registration</p>	<p>(1)</p> <p>Personnel Assistants (2)</p> <p>Elementary Registrar (1)</p> <p>Director of Food Services (1)</p>	<p>Personnel Budget &amp; Monitoring</p> <p>Elementary Registration</p> <p>Food Services</p>
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