

Town of Shirley

BOARD OF SELECTMEN



7 KEADY WAY – SHIRLEY, MASSACHUSETTS - 01464-2812

Enrico C. Cappucci, Chair

Holly J. Haase., Vice Chair

James D. Wilson, C

TEL: (978) 425-2600, x200

Fax: (978) 425-2602

Selectmen@shirley-ma.gov

BOARD OF SELECTMEN

MINUTES

February 6th, 2017

TOWN OFFICES

The Board of Selectmen convened its meeting on Friday, February 6th 2017 at the Town Offices, Meeting Rooms A & B, Chair Enrico Cappucci presiding, with Selectmen Holly Haase, Selectmen James Wilson and Town Administrator Patrice Garvin in attendance.

TOWN ADMINISTRATOR REPORT

Town Administrator Patrice Garvin gave her weekly report:

1. The Town has received resignations for the Energy Committee, Economic Development Committee and the Bylaw Review Committee. I encourage all interested residents to submit a letter of interest to volunteer to be on one of these committees.
2. The Town received the Nashoba Valley Regional School Assessment for FY18. The school lost eleven students from Shirley. The schools assessment will be factored into the FY18 budget, which we are currently working on. The assessment decreased a significant amount due to their Excess and Deficiency total.
3. The health insurance increase, at the time of the drafting this report, has not been received. I am carrying an eight percent (8%) estimate for FY18. The range given by the provider is a minimum of four percent (4%) to a maximum fifteen point three percent (15.3%). Given this wide range I think eight percent (8%) is a safe estimate.
4. We met with the state regarding the Main Street Bridge and how the MassWorks grant distributes funds to the Town. The state is very happy with the progress on the bridge. The bid opening for the project was directly after the meeting with the state. The Town received ten bids with the lowest bid under the state grant award amount of \$725k. The lowest bid needs to be reviewed and references need to be checked. Once that review is completed a bid award will be presented to you at an upcoming meeting. Construction is set to begin in early March.
5. Finally, the Finance Team and I have met with the Town Departments. I want to thank Stew Cady and John O'Keefe for their participation as Finance Committee representatives, during the meetings with the departments. There was a lot of good discussion. Now that those meetings have concluded we will be working on the recommended budget.

TREASURY WARRANTS

Selectman Haase moves to accept the treasurer warrants as presented. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

APPROVAL OF MINUTES

OLD BUSINESS

NEW BUSINESS

1. Annual Town Meeting

- a. Reschedule Annual Town Meeting Date, May 15th 2017

Selectman Haase moves to re-schedule the Annual Town Meeting for Monday May 15th 2017. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

- b. Extend Town Meeting Closing Warrant

Selectman Haase moves to extend the closing of the Town Meeting Warrant to Monday March 6th 2017. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

2. Recreation Commission Request from Auditor / Outside Review

Selectmen Cappucci invited members of the Recreation Commission and Auditor Dick Hingston to the table for a discussion regarding financial practices within the Recreation Commission Office. Cappucci mentions a letter written by Police Chief Thomas Goulden where an outside investigation into this matter by The District Attorney's Office is requested. This letter/investigation was never requested by the current Board of Selectmen but by the former Chairman of the Board. The Selectmen state that they would like this matter taken care of in house between the Recreation Commission and Auditor Hingston

Selectman Haase moved have Dick Hingston and the Recreation Commission work together on a control audit. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

Selectman Wilson moved have Chair Cappucci contact the District Attorney's Office to request they allow the town and Mr. Hingston to hold a control audit instead of their office getting involved at this time. Selectman Haase Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

3. Ayer Shirley Regional School Budget Presentation

Superintendent Mary Malone, Chief Financial Officer William Plunkett and members of the Ayer Shirley Regional School Committee made a presentation regarding the Ayer Shirley Regional School District Purposed Budget. **Entire Presentation and Actuals Attached**

4. Key Cards and Office Access

Selectmen Haase would like to make sure everyone that has resigned has returned their keys. Town Administrator Garvin pointed out that only active employees and current Chairs of Committees have access to Town Hall. Garvin will present a list of all active key holders to the Board of Selectmen.

Selectmen Haase states that she would like Garvin to keep her office unlocked as she would like access to the law books within the office. Garvin will keep her office unlocked.

5. Management of Selectmen's Office

Selectmen Haase requests synopsis of what Town Administrator Garvin and Executive Assistant / Benefits Coordinator Nathan Boudreau do during a regularly scheduled office day. Town Administrator Garvin agreed.

6. Heartle Report, Vote to Release

Chair Cappucci mentioned that the Board of Selectmen would like to bring in Mrs. Jean Heartle in for a meeting to discuss her report with the current Board of Selectmen. It was pointed out that there would be a cost associated with this and all were in agreement.

Selectman Wilson moved to invite Mrs. Heartle to come back and speak with the Board regarding her report. Selectman Haase Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passes.

7. Driveway Permits

Selectman Haase moved approve the Road cut permit for 12 Squanacook Road contingent upon paying back taxes. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

8. Road Cut Permits

Selectman Haase moved approve the Road cut permit for 16 Ayer Road. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

Selectman Haase moved approve the Road cut permit for Maine Street Bridge at Lancaster Street. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

9. JBOS Selectmen Representative

Board of Selectmen discussed which one of them would represent the Board on the Regional Joint Board of Selectmen. Chairman Cappucci volunteered.

Selectman Haase moved to appoint Enrico C. Cappucci to the Joint Board of Selectmen. Selectman Wilson Seconded. Enrico C. Cappucci vote Aye, Holly J. Haase vote Aye, James D. Wilson vote Aye. Motion Passed.

PUBLIC COMMENTS

Marianne Stauch Cardillo questioned why monetary values are not read during the time when the treasury warrants are approved. TA Garvin will provide these numbers for future meetings.

Selectmen Haase will draft a committee charge for a new communications committee to create a more open atmosphere on the internet for the Town.

Selectmen Wilson is looking into times for office hours outside of these meetings. Janet Tice suggests holding an open house for all of the Boards and Committees so people can learn more about open opportunities and potentially volunteer for openings.

Mr. Tim Hatch asked who decides on use of Town Counsel which was answered by Town Administrator Garvin stating that the Board of Selectmen is the only body that can decide to use Town Counsel.

Jim Yocum would like to thank the previous selectmen for their efforts and time spent attempting to make the Town a better place. All agreed.

ANNOUNCEMENTS

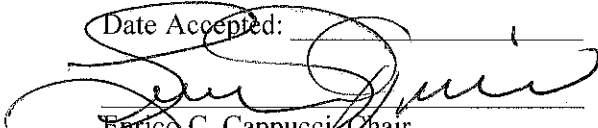
Next Meeting 2/13/17 at 7:00

ADJOURNMENT


With no further business to discuss, *Motion made and seconded to adjourn at 9:23 p.m. All in favor. Motion Passed.*

Respectfully submitted,
Nathan Boudreau, Executive Assistant

Date Accepted: _____

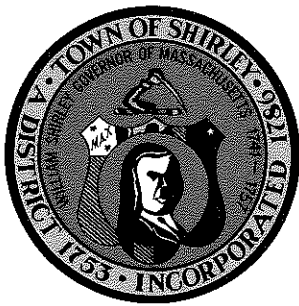

Enrico C. Cappucci, Chair


Holly J. Haase, Vice Chair


James D. Wilson, Clerk

Pursuant to the 'Open Meeting Law,' G.L. 39, § 23B, the approval of these minutes by the Board constitutes a certification of the date, time and place of the meeting, the members present and absent, and the actions taken at the meeting. Any other description of statements made by any person, or the summary of the discussion of any matter, is included for the purpose of context only, and no certification, express or implied, is made by the Board as to the completeness or accuracy of such statements.

Agenda Item	Documents used
1	
2	Letter requesting District Attorney Assistant by Chief Thomas Goulden*
3	Ayer Shirley Regional Budget Presentation*
4	
5	
6	
7	Driveway Applications
8	Road Cut Applications
9	
	*Indicated inclusion in physical packet



TOWN OF SHIRLEY POLICE DEPARTMENT

11 Keady Way
Shirley, Massachusetts 01464

THOMAS J. GOULDEN II
CHIEF OF POLICE

February 2, 2017

Ms. Patrice Garvin
Town Administrator
Town of Shirley
7 Keady Way
Shirley, MA 01464

RE: Recreation Commission Review of Controls

Dear Ms. Garvin:

May this find you well. This letter is intended to inform you what actions I have taken so far regarding your January 25, 2017 request to seek an outside investigator to examine the internal financial controls of the Shirley Recreation Department.

As you probably recall, you provided me with a copy of a January 10, 2017 email which was sent to the recreation commission by the outside auditing firm of *Giusti, Hingston & Company C.P.A.* The email asked specific questions about internal (financial) controls which I understand have gone unanswered.

When I received your request I contacted the office of Middlesex District Attorney Marian Ryan to request guidance and assistance from the Special Investigations Unit (SIU) to look into this matter. On January 27th I spoke with Attorney Ryan and explained that you received direction from the Chairperson of the Board of Selectmen to have an outside investigator look into the failure by the Recreation Commission to respond to requests for information from *Giusti, Hingston & Company C.P.A.* regarding an audit they were conducting. Attorney Ryan informed me that she would speak with her lead investigator and would have someone contact me. I also provided Attorney Ryan with contact information for *Giusti, Hingston & Company C.P.A.* as well as contact information for yourself.

I told you about my conversation with Attorney Ryan and I informed you that you would probably be contacted by William Freeman of the Special Investigations Unit.

On January 27th, I received a phone call from Mr. Freeman. He asked me a few questions regarding the investigation and informed me that he would be assigning the investigation to Assistant District Attorney Mary O'Neill. Mr. Freeman provided me his phone number and said to call him if I had any additional questions. I immediately informed you about my conversation with Mr. Freeman and that Attorney O'Neill was being assigned to this case.

DEPARTMENT/OPERATIONS

978-425-2642
FAX: 978-425-2646

RECORDS BUREAU

978-425-2644
FAX: 978-425-2646

EXECUTIVE ASSISTANT

978-425-2644
FAX: 978-425-2646
pcallahan@shirley-ma.gov

CHIEF OF POLICE

978-425-2645
FAX: 978-425-2646
tgoulden@shirley-mapd.org

On January 31, 2017 at approximately 2:27 PM you told me that newly elected Selectperson, Holly Haase had directed you to contact me and tell me "not to do anything in regards to [the] Recreation Commission until the Board meets on Monday". As you may recall, I asked you to please send me an email documenting what you were told by Ms. Haase.

On February 1, 2017 at approximately 12:15 PM, I forwarded a copy of your email regarding the above to District Attorney Marian Ryan. This email specifically regarded Ms. Haase's instructions telling me "not to do anything".

On February 1, 2017 at about 1:30 PM, I received a telephone call from the Middlesex District Attorney's office. The caller was Attorney O'Neill and she wanted to request assistance from the Shirley Police Department. Specifically, Attorney O'Neill wanted a Detective to conduct preliminary interviews with anyone who was involved with the Shirley Recreation Commission. These preliminary interviews were an alternative to subpoenaing witnesses to a Grand Jury. I informed Attorney O'Neill that I had been instructed by a newly elected member of the Board of Selectmen not to speak with her office regarding the Recreation Department until the full board met on February 6th. I asked her to please make a written request.

At approximately 2:48 PM on February 1, I received an email from Assistant District Attorney O'Neill which included several attachments with information and questions that if answered, would be helpful to the Detective who was conducting preliminary interviews with people Assistant District Attorney O'Neill had identified who have interacted with the Recreation Department.

I acknowledged the receipt of Attorney O'Neill's email and attachments by return email and informed her that I would assign Detective Olivia Siekman to assist the Middlesex District Attorney's office with their review of the Recreation Departments internal financial controls.

I immediately informed you about the telephone call and email from Assistant District Attorney O'Neill asking for assistance from the Shirley Police Department. I further informed you that Ms. Haase's instruction to me "not to do anything " was going to present problems and I wanted to make sure that you were aware of this situation. I also told you that I intended to write a letter expressing my concerns regarding Ms. Haase's instructions which were issued outside of a posted Board of Selectmen's meeting.

I would appreciate clarification from the Board of Selectmen about why Ms. Haase made the decision without the approval of the full Board to instruct me "not to do anything". This instruction prevents me from performing my sworn duties as Chief of Police.

Respectfully Submitted



Thomas J. Goulden
Chief of Police

cc: Mary F.P. O'Neill Assistant District Attorney Middlesex County



Ayer Shirley Regional School District Preliminary FY18 Budget Presentation Town of Shirley

February 6, 2017

Superintendent, Mary Malone, Ed. D
Director of Finance, William Plunkett

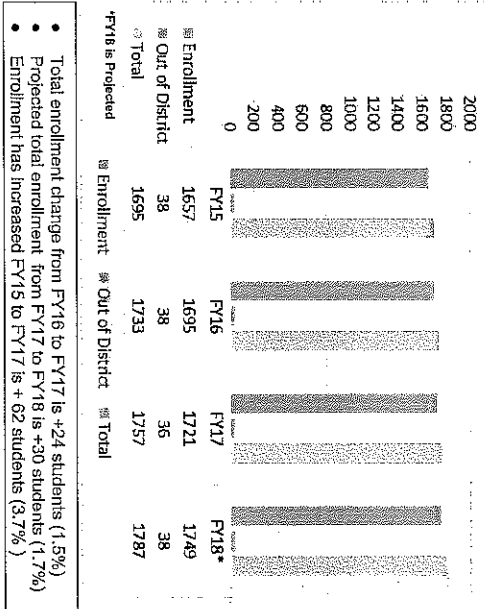


Agenda

- Enrollment Trends
- Budget Drivers
- Budget Highlights
- Assessment
- Questions

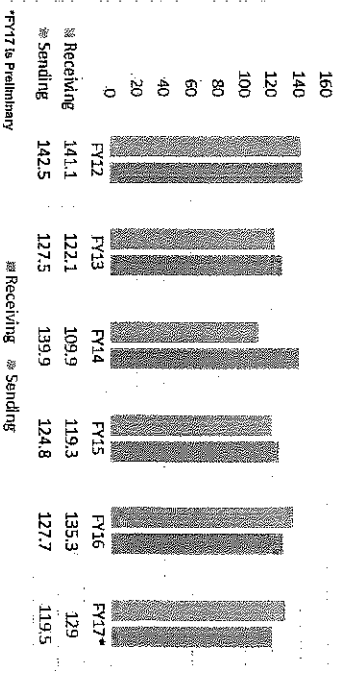


District Student Enrollment FY15-FY17 (October 1 Report)



- Total enrollment change from FY16 to FY17 is +24 students (1.5%)
- Projected total enrollment from FY17 to FY18 is +30 students (1.7%)
- Enrollment has increased FY15 to FY17 is +62 students (3.7%)

School Choice Trends FY12-FY17



- Sending vs. receiving is 0.5 (FE) positive for receiving FY17
- Sending decreased 23 students from FY15 to FY17 (16% decrease)

Special Education Programs Continuum of Services, Preschool-12



Lura A. White Elementary School (Grades Preschool-5):

- Integrated Preschool (Ages 3 & 4)
- Autism Spectrum Disorder (ASD)/Integrated Preschool (Ages 3 & 4)
- Structured Learning Center (SLC) (K-2)
- Structured Learning Center (SLC) (3-5)
- Inclusion (K-5)

Page Hilltop Elementary School (Grades Preschool-5):

- Integrated Preschool (Ages 3 & 4)
- Student Support Center (SSC) (K-2)
- Student Support Center (SSC) (3-5)
- Inclusion (K-5)

Aver Shilley Regional Middle School (Grades 6-8):

- Student Support Center (SSC) (6-8)
- Adaptive Learning Center (ALC) (6-8)
- Structured Learning Center (SLC) (6-8)
- Inclusion (6-8)

Aver Shilley Regional High School (Grades 9-12):

- Student Support Center (SSC) (9-12)
- Adaptive Learning Center (ALC) (9-12)
- Structured Learning Center (SLC) (9-12)
- Inclusion (9-12)

Special Education



Student Enrollment	2015 June 30	2016 June 30	2017 Oct. 1
Total Special Education Student Population	376	328	319
ASRSD special education students	23.7%	19.3%	18.8%
State average	17.1%	17.2%	Not Released
Percent of special education students out of district (36)	10.0%	9.76%	11.3%
Special education students in out of district placements from total enrollment	2.0%	1.98%	2.1%

English Learners

4 Year Trend	2012-13	2013-14	2014-15	2015 - 16	2016-17	Projected 2017-2018
Total ELs	45	50	53	60	60	57

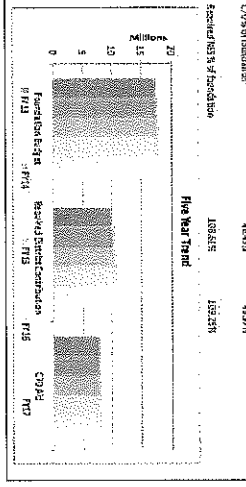
- 2016
Stats - 10/20/16
- NO ENO

FY18 Chapter 70 Summary



Massachusetts Department of Elementary and Secondary Education FY18 Chapter 70 Summary

616 Ayer Shirley	Contribution to FY17				
	FY17	FY18	Change	FY17	FY18
All Contribution FY18					
Member Aid					
1 Charter FY17	\$144,031	1,176	1,176	13	1,189
2 Foundation Aid					
3 Residual District Contribution	11,758	1,771	1,771	13	1,784
4 Foundation Aid LEA	10,966,245	11,255,706	289,461	13	289,461
5 Incorporated FY17-18	4,344,251	4,435,167	90,916	13	90,916
6 Non-Operating District Reallocated to Foundation	11,758,216	11,758,216	0	13	0
7 Residual District Contribution	11,758,216	11,758,216	0	13	0
8 Minimum Aid	33,400	33,400	0	13	0
9 Sum of the 1-8 above	8,119,472	8,119,472	0	13	0



Local Contributions



Massachusetts Department of Elementary and Secondary Education FY18 Chapter 70

LEA Member	FY17	FY18	Change	FY17	FY18	Change
616 Ayer Shirley						
Regional District Enrollment and Contributions by Member City or Town						
Foundation Enrollment	1,758	1,771	13	10,966,245	11,255,706	353,461
Required Minimum Contribution	4,000	999	-1	6,704,514	6,824,539	120,025
	758	772	14	4,201,731	4,435,167	233,436

Increased Fixed Costs - FY18 Budget Drivers



	FY18	% Increase
Salary adjustments for all union/nonunion ASRSD employees	\$ 380,000	~2.5%
Sped Out of District Tuitions	\$ 347,498	13%
Health Insurance (FY18, 8% rate increase)	\$ 241,911	8%
Special Education Transportation	\$ 27,408	4%
Maintenance Contracts (LAW, MS & PHT)	\$20,000	8%
Insurance (Worker's Comp.)	\$ 20,000	22%
Insurance (Property)	\$ 20,000	32%
Total:	\$ 1,056,817	

Revenue FY16 – FY18



Source	FY16 Budget	FY17 Final	FY18 Proj.	Change
Chapter 70	\$ 8,047,361	\$ 8,144,051	\$ 8,179,471	\$ 35,420
Regional School Transportation	\$289,380	\$ 306,340	\$306,340	\$ 0
Charter Tuition				
Reimbursement	\$122,631	\$ 63,403	\$62,491	(\$ 912)
School Choice Receiving Tuition	\$ 779,951	\$ 777,809	\$841,716	\$ 63,907
Total Estimated Receipts:	\$ 9,239,323	\$ 9,291,603	\$ 9,390,018	\$ 98,415
Estimated Charges:				
Special Education	\$14,090	\$10,335	\$10,335	\$ 0
School Choice Sending Tuition	\$ 713,575	\$ 720,623	\$720,623	\$ 0
Charter School Sending Tuition	\$ 1,018,922	\$ 912,497	\$922,143	\$ 9,646
Total Estimated Charges:	\$ 1,746,587	\$ 1,643,455	\$ 1,653,101	\$ 9,646
Receipts Net of Charges	\$ 7,492,736	\$ 7,648,148	\$ 7,736,917	\$ 89,769

FY18 District Initiatives (Cont.)



Initiative	Cost
Two New Electives at HS: Video Pre Production and Video Post Production (SPACD currently provides courses to middle school students. Now students can continue to pursue this pathway at the high school.)	Instructor costs paid from tuitions received from International Education Program
Expand Accelerated Math to Grades 2-5	Increase \$5,000
District Textbooks K-5 Literacy MS ELA	Increased line by \$25,159 to \$55,159 Donation for literacy textbooks @ \$60,000
K-12 Robotics Coaches	\$6,000 in General Fund \$6,000 from Bennis Donation
Approved Department Heads and Principals Budget Requests	Re-Allocations and Budget Increases
Expand Nurse Leader role	\$20,000
Maintain Reasonable Class Size	
No Reductions to Staff, Programs, or Services	

Superintendent's Budget



Identified Need	Cost
Early Childhood Coordinator/Out of District Coordinator	\$70,000
Literacy Coach	\$75,000
Mathematics Coaches -Hired 1 Math Coach at contractual hourly rate (\$31.21) up to 19 hours per week Grant funded in FY17	\$20,000
1:1 Technology Device Environment, Gr. 3 -12	\$400,000
Grades 6-8 ELA	550,000
K-8 Social Studies Resources (Textbooks & Digital)	\$110,000
K-8 Science Resources (Textbooks & Digital)	\$110,000
	\$835,000

Preliminary ASRSD FY18 Assessments to Ayer & Shirley



FY18 Total Operating Assessment & Excluded Debt
 \$18,931,232
 \$ 789,939 4.4%

Ayer
 Assessment \$11,407,150
 Breakdown: \$327,406 3.0%
 RLC (-1 student) \$120,025
 ASRSD Assessment \$207,381

Shirley
 Assessment \$7,524,082
 Breakdown: \$462,533 6.6%
 RLC (+14 Students) \$233,436
 ASRSD Assessment \$229,097

Assessment History FY15-FY18



	FY15	FY16	FY17	FY18 Projected	Avg/ Per Yr.
Assessment (Operating) No excluded debt	\$14,956,105	\$15,970,290	\$16,762,989	\$17,549,254	\$16,319,660
Increase		\$974,185	\$792,699	\$786,265	\$851,050
%		6.5%	4.96%	4.7%	5.39%

ASRSD FY18 Preliminary Budget

1-18-17

EXPENSES						EXPENSES
General Fund	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. Budget FY18	
Net School Spending						
Central Office	391,567	367,998	686,500	313,208	697,208	
District Instruct. & Services	866,745	809,266	641,736	692,105	723,234	
Business	350,185	355,400	341,450	341,450	330,950	
Risk Management	3,206,997	3,620,925	4,145,734	4,185,734	4,428,879	
Technology	431,359	399,929	410,139	412,921	412,921	
Facilities	1,640,942	1,780,850	1,879,623	1,882,560	1,850,060	
Special Education	2,906,230	3,045,003	3,041,003	3,105,679	3,346,177	
Early Childhood	127,275	146,648	157,575	162,227	162,227	
Lura White	1,954,996	2,031,018	2,217,378	2,391,798	2,395,070	
Page Hilltop	3,144,819	3,149,976	3,039,866	2,885,444	2,789,858	
Middle School	2,324,340	2,427,935	2,450,935	2,505,632	2,502,628	
High School	3,043,974	3,081,504	3,108,504	3,262,630	3,288,771	
Other Districts	1,834,010	1,876,200	1,768,929	1,768,929	1,768,929	
	22,223,439	23,092,652	23,889,372	23,910,317	24,696,912	
Non-	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Preliminary FY18	
Net School Spending						
Transportation	1,282,732	1,333,000	1,438,812	1,418,812	1,479,644	Transportation Assess. Formula
Capital - Debt (Excluded)	1,379,836	1,380,054	1,378,304	1,378,304	1,381,979	Debt Assessment Formula
Capital - Stab. Fund (Excluded)	0	0	0	0	0	Debt Assessment Formula
Capital - Other	0	0	0	0	0	Capital Assessment Formula
	2,662,568	2,713,054	2,817,116	2,797,116	2,861,623	
Total	24,886,007	25,805,706	26,706,488	26,707,433	27,558,534	

REVENUE						REVENUE
General Fund Revenue	FY15	FY16	FY17	FY17 Xfer	FY18	
Chapter 70	8,003,886	8,038,666	8,082,521	8,082,521	8,186,551	FY17 + \$25 per student
Charter Tuition Reim.	110,000	97,880	87,508	87,508	62,491	FY17 projection
Region Transport. Aid	270,000	254,555	285,165	285,165	306,340	FY17 projection
Region Incentive Aid	33,280	0	0	0	0	
Medicaid	110,000	110,000	110,000	110,000	110,000	level funded
	8,527,166	8,501,101	8,565,194	8,565,194	8,665,382	

Assessment	FY15	FY16	FY17	FY17 Xfer	FY18	Assessment
Operating	14,996,105	15,970,290	16,762,989	16,762,989	17,511,174	
Capital (Debt) Excluded	1,379,836	1,380,054	1,378,304	1,378,304	1,381,979	
Total	16,375,941	17,350,344	18,141,293	18,141,293	18,893,152	

Other Funds	FY15	FY16	FY17	FY17 Xfer	FY18	
Revolving	1,753,982	1,891,583	1,891,583	1,891,583	1,949,233	(see detail page)
Grants	1,071,371	1,093,439	1,098,989	1,098,989	958,409	(see detail page)
Subtotal	2,825,353	2,985,022	2,990,572	2,990,572	2,907,642	
All Funds - Total	27,711,360	28,790,728	29,697,060	29,698,005	30,466,176	

ASRSD FY18 Assessment Detail

Operating Assessment		Total	Ayer	Shirley	Formula Source and Shares
1	Required Local Contribution	11,007,981	6,771,591	4,236,390	FY17 DESE/DOR data
2	Net School Spending Above RLC	5,023,549	2,869,464	2,154,085	ASRSD - 57/43 % allocation
3	Transportation	1,479,644	845,176	634,468	ASRSD - 57/43 % allocation
4	Capital: Debt (Not Excluded)	0			ASRSD - 58/42 % allocation
5	Capital - All Other	0	0	0	ASRSD - 57/43 % allocation
Total		17,511,174	10,486,231	7,024,943	
	FY17	16,762,989	10,074,800	6,688,189	
	increase	748,185	411,431	336,754	
		4.5%	4.1%	5.0%	

Excluded Debt					
4	Capital: Debt Service	1,395,619	984,007	411,612	Calculation on Capital Debt detail page 17
4	Capital: Stab. Fund Withdrawal	(13,640)	0	(13,640)	To be Approved by Shirley Selectmen vote
Total		1,381,979	984,007	397,972	

Total - Oper. Assess. & Excluded Debt		18,893,152	11,470,238	7,422,914	
	FY17	18,141,293	11,079,744	7,061,549	
	increase	751,859	390,494	361,365	
		4.1%	3.5%	5.1%	

NSS In Excess of RLC		Total	Ayer	Shirley	
	Base Year (FY11) Allocation	100.0%	76.3%	23.7%	Certified FY12 budget - Sect. VI B (2) a-d
	Seventh Fiscal Year (FY18) Allocation	100.0%	57.1%	42.9%	FY18 calculation - Sect. VI B (1)
	Difference		19.1%	-19.1%	
	Base Year (FY11) Allocation		76.3%	23.7%	
	80% of Difference	N/A	N/A		Section VI B (2) I, phase in complete
	FY18 Allocation as Adjusted		57.1%	42.9%	FY18 calculation - Sect. VI B (1)

Assessment Element	Basis & Calculation
1 Required Local Contribution	FY17 from DESE - Based on town income & property value
2 Net School Spending Above RLC	FY17 phase in 100%.
3 Transportation	Foundation Enrollment Share - five year average
4 Capital: Principal & Interest	50% Found. Enroll. Share and 50% Resid. Enroll. Share MS & HS (Roll. Avg.)
5 Capital - All Other	Five Yr. Avg. of 50% Found Enroll. Share and 50% Comb. Effort Yield (DESE)

ASRSD FY18 Central Office

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
SCHOOL COMMITTEE (1110)							
Secretary Salary	0	0	0	0	0		
Treas./Assist. Salary	10,355	10,500	10,500	10,815	10,815	Stip.	
Salary - Other	72,937	49,223	380,000	0	380,000		Teachers FY18 + all other staff (2.5%)
Salary - Retirement	40,000	40,000	20,000	20,000	24,000		3 Retirees (2 FY17, 1 FY16)
District Elections	0	0	0	0	0		
Supplies	1,100	1,100	1,100	1,100	1,100		
Advertising & Other	4,400	4,400	4,400	4,400	4,400		
Prior Year Bills	0	0	0	0	0		
Dues, Registrations	5,100	5,100	5,100	5,100	5,100		
	133,892	110,323	421,100	41,415	425,415		
SUPERINTENDENT (1210)							
Supt. Salary	155,000	155,000	158,100	162,843	166,843	1.0	roll in annuity
Admin. Assist. Salary	50,875	50,875	55,000	56,650	56,650	1.0	
Other Salary	4,000	4,000	4,000	4,000	0		
Postage	500	500	1,000	1,000	1,000		
Supplies	3,500	3,500	3,500	3,500	3,500		
Memberships & Dues	5,300	5,300	5,300	5,300	5,300		
Services - Software	5,000	5,000	5,000	5,000	5,000		
Advertising	3,500	3,500	3,500	3,500	3,500		
Registrations & Conferences	2,500	2,500	2,500	2,500	2,500		
Travel	2,500	2,500	2,500	2,500	2,500		
	232,675	232,675	240,400	246,793	246,793		
LEGAL (1430)							
Legal - Supt./Other	25,000	25,000	25,000	25,000	25,000		
	25,000	25,000	25,000	25,000	25,000		
	391,567	367,998	686,500	313,208	697,208	2.0	

ASRSD FY18 District - Instructional Services

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
CURRICULUM & INSTR.(2110)							
Salary - Director	116,980	116,480	120,850	124,476	124,476	1.0	
Salary - Annuity	1,500	1,500	1,500	1,500	1,500		
Translation - Salary	1,500	1,500	4,000	4,000	0		move to ELL services
	119,980	121,480	126,350	129,976	125,976		
LEAD TEACHERS (2220)							
Salary - Coordinators	6,075	6,150	6,150	33,291	38,261		Increase for Nurse Leader
	6,075	6,150	6,150	33,291	38,261		
TEACHER SALARY (2305)							
Health Insurance Offset	74,000	72,000	68,000	68,000	64,000		32 @ \$2k ea.
Return from Leave Of Absence	0	0	0	0	0		
Lane Changes	60,000	20,000	20,000	20,600	20,600		
Turnover/Retirement Savings	0	0	0	0	0		
	134,000	92,000	88,000	88,600	84,600		
SPECIALIST TEACHER (2310)							
Teacher Salary - ELL	166,329	169,275	169,275	188,277	188,277	3.0	
	166,329	169,275	169,275	188,277	188,277		
SUBSTITUTES (2325)							
Salary - Coordinator & Assist.	7,900	7,900	7,900	7,900	7,900		
Salary - Teachers - Long Term	42,000	42,000	37,000	37,000	37,000		
Salary - Reg. Ed. Teach. - LAW	13,000	13,000	0	0	0		
Salary - Reg. Ed. Teach. - PH	20,000	20,000	0	0	0		
Salary - Reg. Ed. Teach. - MS	20,000	20,000	0	0	0		
Salary - Reg. Ed. Teach. - HS	20,000	20,000	0	0	0		
Salary - Sp. Ed. Teach. - LAW	4,000	4,000	0	0	0		
Salary - Sp. Ed. Teach. - PH	6,000	6,000	0	0	0		
Salary - Sp. Ed. Teach. - MS	5,000	5,000	0	0	0		
Salary - Sp. Ed. Teach. - HS	3,000	3,000	0	0	0		
Salary - Other (Nurse Subs.)	10,000	10,000	10,000	10,000	8,000		
Service - Other (Nurse)	0	0	0	0	0		
Service - Sub. Mgmt. System	4,200	4,200	4,200	4,200	5,400		
	155,100	155,100	59,100	59,100	58,300		
PARA. (2330)							
Subs. - LAW	10,000	10,000	0	0	0		
Subs. - PH	22,000	22,000	0	0	0		
Subs. - MS	10,000	10,000	0	0	0		
Subs. - HS	2,000	2,000	0	0	0		
	44,000	44,000	0	0	0		
PROF. DEVEL (2357)							
Salary - Teachers	0	0	0	0	0		
Salary - Subs. Teachers	2,000	2,000	2,000	2,000	2,000		
Salary - Subs. Paras	0	0	0	0	0		
Supplies	10,000	10,000	8,000	8,000	8,000		
Services - Consultants	15,000	15,000	15,000	15,000	15,000		
Course Reimbursement	25,000	25,000	25,000	25,000	25,000		
Other (Travel/Conf.)	3,500	3,500	3,500	3,500	3,500		
	55,500	55,500	53,500	53,500	53,500		
TEXTBOOKS (2410)							
Textbooks	30,000	30,000	30,000	30,000	55,159		district initiatives
	30,000	30,000	30,000	30,000	55,159		
INSTRUCT. EQUIP. (2420)							
Postage Machine Leases	5,100	5,100	5,100	5,100	5,100		
Copier Leases	67,536	57,536	57,536	57,536	57,536		
Copier Supplies	4,975	4,975	4,975	4,975	4,975		
	67,611	67,611	67,611	67,611	67,611		
INSTR. SUPPLIES (2430)							
Supplies - 504	500	500	500	500	500		
Supplies - ELL	4,000	4,000	4,000	4,000	4,000		
Services - Interpreters, translation	1,000	1,000	1,000	1,000	5,000		Interpreters, other services, translation
	5,500	5,500	5,500	5,500	9,500		
OTHER INSTRUCT. (2440)							
District Travel	1,000	1,000	1,000	1,000	1,000		
	1,000	1,000	1,000	1,000	1,000		
INSTRUCT. SOFTWARE (2455)							
Software - Ren. Reading & Math	10,000	10,000	10,000	10,000	25,000		combined above
Software - Math	10,000	10,000	10,000	10,000	0		
Software - Library (Follett)	4,000	4,000	4,000	4,000	4,600		
Software - Student Admin.	26,400	26,400	0	0	0		
Software	20,000	0	0	0	0		Lexia online reading/assessment
Software - Curriculum Mapping	5,000	5,000	5,000	5,000	5,200		
	75,400	55,400	29,000	29,000	34,800		
HEALTH (3200)							
School Physician	4,000	4,000	4,000	4,000	4,000		
Software - SNAP	2,250	2,250	2,250	2,250	2,250		
Supplies	0	0	0	0	0		
	6,250	6,250	6,250	6,250	6,250		
	866,745	809,266	641,736	692,105	723,234	4.0	

ASRSD FY18 Business

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
BUSINESS (1410)							
Director - Salary	111,650	113,150	107,500	107,500	115,000	1.0	
Salary - Coord./Assists.	183,085	183,800	158,000	158,000	158,000	3.0	
Services - DESE Audit	3,000	3,000	3,000	3,000	3,000		
Services - Annual Audit	19,000	20,000	25,000	25,000	25,000		
Services - Accting. Assist.	5,000	5,500	5,500	5,500	0		In house
Services - Bank Fees	1,000	1,000	1,000	1,000	1,000		
Services - Financial Advisor	0	0	0	0	0		
Services - Bond Counsel	0	0	0	0	0		
Postage	2,000	2,000	2,000	2,000	2,000		
Supplies	3,950	3,950	3,950	3,950	3,950		
Services - Software Support	18,500	20,000	32,500	32,500	20,000		Hosted Applic. (\$12,500) year 1 cost
Prof. Devel and Travel	3,000	3,000	3,000	3,000	3,000		
Interest - Revenue Antic. Notes	0	0	0	0	0		
	350,185	355,400	341,450	341,450	330,950	4.0	-100.0%

ASRSD FY18 Risk Management

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	Detail
RETIREMENT/MEDICARE (5100)						
Middlesex Retirement	273,961	384,727	425,887	425,887	423,928	Actual assaessment
Medicare Tax	213,000	219,390	207,713	207,713	212,906	2.5% increase
	486,961	604,117	633,600	633,600	636,834	
EMPLOYEE INSURANCE (5200)						
Health Ins. - Employees	2,433,049	2,777,558	3,118,089	3,118,089	3,360,000	7.8% increase
Health Ins. - Retirees	81,737	0	144,795	144,795	144,795	level fund
Life Ins. - Employees	3,000	3,000	3,000	3,000	3,000	
Life Ins. - Retirees	50	50	50	50	50	
Workers Comp.	83,000	93,000	93,000	113,000	113,000	\$20k rate Increase
Unemp. Comp.	60,000	60,000	60,000	60,000	60,000	
Unemp. Admin.	1,500	1,500	1,500	1,500	1,500	
COBRA Admin.	1,000	1,000	1,000	1,000	1,000	
Legal/Prof. Services	8,000	2,000	2,000	2,000	0	
Flex. Spending Admin.	4,000	4,000	4,000	4,000	4,000	
	2,675,336	2,942,108	3,427,434	3,447,434	3,687,345	
OTHER INSURANCE (5260)						
Fidelity Bonds	1,000	1,000	1,000	1,000	1,000	Treasurer & Assist. Treasurer
Property	23,000	53,000	63,000	83,000	83,000	\$20k rate increase
Equip./Umbrella	6,600	6,600	6,600	6,600	6,600	
School Board Liability	4,800	4,800	4,800	4,800	4,800	
General Liability	8,300	8,300	8,300	8,300	8,300	
Deductible Reserve	1,000	1,000	1,000	1,000	1,000	
	44,700	74,700	84,700	104,700	104,700	
	3,206,997	3,620,925	4,145,734	4,185,734	4,428,879	

ASRSD FY18 Technology

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
TECHNOLOGY (1450)							
Salary - Director	83,500	86,000	87,720	90,352	90,352	1.0	
Salary - Coord./Other	190,895	184,765	149,155	149,155	149,155	3.0	
Salary - Webmaster	0	5,000	5,000	5,150	5,150	stip.	
Services - Internet/Firewall	26,064	26,064	26,064	26,064	26,064		
Services - Anti-Virus	0	0	0	0	0		
Services - E mail Archive	3,500	3,500	3,000	3,000	3,000		
Services - Wide Area Network	33,000	0	0	0	0		
Services - Software	5,200	5,200	5,200	5,200	5,200		
Services - School Dude	14,000	14,000	4,000	4,000	4,000		
Services - Switches	0	0	0	0	0		
Services - Repair	7,000	7,000	7,000	7,000	7,000		
Services - Prof. Devel.	5,000	5,000	5,000	5,000	5,000		
Equip. & Services - Telephone	0	0	0	0	0		
Equip. - Hardware Replacement	25,000	25,000	25,000	25,000	25,000		
Equip. - Network	10,000	10,000	20,000	20,000	20,000		
Equip. - Servers	0	0	0	0	0		
Equip. - Data Backup	2,000	2,000	2,000	2,000	2,000		
Equip. - Power Backup	0	0	0	0	0		
	404,959	373,529	339,139	341,921	341,921		
INSTRUCT. TECH. (2451)							
Hardware	0	0	0	0	0		
Software	18,000	18,000	18,000	18,000	18,000		
Supplies	23,000	23,000	23,000	23,000	23,000		
	41,000	41,000	41,000	41,000	41,000		
INSTRUCT. SOFTWARE (2455)							
Software - Student Admin (Redike	26,400	26,400	30,000	30,000	30,000		
	26,400	26,400	30,000	30,000	30,000		
	431,359	399,929	410,139	412,921	412,921	4.0	

ASRSD FY18 Facilities
1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
CUSTODIAL (4110)							
Facilities Coord.	28,750	30,000	20,000	80,000	80,000	1.0	
Cust. - LAW	106,916	132,672	124,800	117,800	124,800	3.0	
Cust. - PH	132,208	157,649	166,400	157,400	166,400	4.0	
Cust. - MS	98,047	73,472	104,000	94,000	104,000	2.5	
Cust. - HS	134,833	106,055	167,200	183,700	187,200	4.5	
Cust. - Maint./Tech.	121,534	112,819	80,000	23,239	23,239	0.5	
Cust. - Shift Diff.	8,580	9,152	9,152	9,152	9,152		
Cust. - OT	10,000	10,000	10,000	10,000	10,000		
Cust. - Vac./Sick Cov.	27,600	41,456	41,456	41,456	41,456		
Cust. - Summer	17,920	13,440	13,440	13,440	13,440		three eight-week positions
Cust. - Clothing Reim.	5,500	5,500	5,500	5,500	5,500		
Services	0	0	0	0	0		
Supp./Travel - District	10,000	10,000	10,000	10,000	10,000		
Supplies - LAW	7,500	7,500	7,500	7,500	7,500		
Supplies - PH	10,000	10,000	10,000	10,000	10,000		
Supplies - MS	7,500	7,500	7,500	7,500	7,500		
Supplies - HS	10,000	10,000	10,000	10,000	10,000		
	736,888	737,215	786,948	760,687	790,187		
HEAT (4120)							
Oil - PH	86,000	79,950	81,500	61,500	61,500		\$10K rent; ACP \$12K; \$1.84/gall.
Oil - LAW	61,900	56,790	64,780	64,780	64,780		\$5K Ext. Day; \$1.84/gall.
Gas - MS	55,125	60,000	72,000	72,000	72,000		60,000 therms @\$1.20/therm
Gas - HS	0	60,000	84,000	84,000	84,000		70,000 therms @\$1.20/therm
	203,025	256,740	282,280	282,280	282,280		
UTILITIES (4130)							
Telephone - Services	40,540	40,540	40,540	40,540	40,540		
Telephone - Supplies	5,000	5,000	5,000	5,000	5,000		
Septic - LAW	3,000	3,000	3,000	3,000	3,000		
Water/Sewer - LAW	6,400	6,400	6,400	6,400	6,400		
Water/Sewer - MS	10,000	10,000	10,000	10,000	10,000		
Water/Sewer - PH	9,000	9,000	9,000	9,000	9,000		
Water/Sewer - HS	13,000	13,000	13,000	13,000	13,000		
Electricity - PH	43,600	71,500	78,500	78,500	76,000		based on 2.5m kwh x 15.2 per kwh
Electricity - LAW	28,360	57,750	48,100	48,100	53,200		based on 2.5m kwh x 15.2 per kwh
Electricity - MS	88,400	101,750	108,750	108,750	83,600		based on 2.5m kwh x 15.2 per kwh
Electricity - HS	140,400	203,500	208,650	208,650	167,200		based on 2.5m kwh x 15.2 per kwh
Gas - PH	6,000	6,000	6,000	6,000	6,000		
Gas - LAW	0	4,000	4,000	4,000	4,000		kitchen propane
Gas - HS	52,500	0	0	0	0		
	446,200	531,440	540,940	540,940	476,940		
GROUNDS (4210)							
Salary - Grounds	22,634	23,260	23,260	23,958	23,958	0.5	
Services	1,500	1,500	1,500	1,500	1,500		
Supplies	10,000	10,000	10,000	10,000	10,000		
	34,134	34,760	34,760	35,458	35,458		
MAINTENANCE (4220)							
Service Contracts - Dist.	26,986	26,986	26,986	26,986	26,986		
Service Contracts LAW	1,000	1,000	1,000	1,000	6,000		\$5k increase
Service Contracts MS	13,000	13,000	13,000	22,000	20,000		\$7k increase
Service Contracts PH	12,000	12,000	12,000	24,000	20,000		\$8k increase
Service Contracts HS	65,000	65,000	65,000	65,000	60,000		
Supplies District	10,750	10,750	10,750	10,750	10,750		
Supplies LAW	1,000	1,000	1,000	1,000	1,000		
Supplies PH	1,000	1,000	1,000	1,000	2,000		
Supplies MS	1,000	1,000	1,000	1,000	1,000		
Supplies HS	1,000	1,000	10,000	10,000	12,000		filters for RTU's
Equipment	0	0	5,000	5,000	0		Water meter upgrades complete
Other	0	0	0	0	0		
Repairs - LAW	0	0	0	0	0		
Repairs - MS	0	0	0	0	0		
Repairs - Plumbing	10,000	10,000	10,000	17,500	17,500		
Repairs - Electrical	10,000	10,000	10,000	10,000	10,000		
Repairs - Boilers/HVAC	20,000	20,000	20,000	20,000	20,000		
Repairs - Elev./Lifts	5,000	5,000	5,000	5,000	15,000		Annual contract for all 4 schools
Repairs - Fire Protect.	10,000	10,000	10,000	10,000	10,000		
Repairs - Trash	21,000	21,000	21,000	21,000	21,000		
Repairs - Other	11,959	11,959	11,959	11,959	11,959		
	220,695	220,695	234,695	263,195	265,195		
TOTAL	1,640,942	1,780,850	1,879,623	1,882,560	1,850,060	16.0	

ASRSD FY18

SpEd

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
LEGAL (1430)							
Legal - SPED	15,000	15,000	15,000	15,000	15,000		
	15,000	15,000	15,000	15,000	15,000		
SPED DIRECTOR (2110)							
Director & Coord. - Salary	111,650	113,150	113,150	113,150	113,150	1.0	
Translation - Salary	4,000	4,000	0	0	0		
Services Medical	6,000	6,000	6,000	6,000	6,000		
Services Misc.	2,783	2,783	2,783	2,783	2,783		
Software - Semstracker	11,000	11,000	11,000	11,000	9,000		
Supplies	4,000	4,000	4,000	4,000	6,000		
Postage	2,320	2,320	2,320	2,320	4,320		
Dues, Registrations	3,225	3,225	3,225	3,225	3,225		includes FLLAC
Travel	3,500	3,500	3,500	3,500	2,500		
	215,159	218,410	214,410	214,410	215,410		
SPED TEACHERS (2310)							
Summer Salary	35,000	35,000	35,000	35,000	30,000		
	35,000	35,000	35,000	35,000	30,000		
TEAM LEADER (2315)							
Salary - Team Chairs	68,000	134,260	134,260	139,746	139,746	2.0	
	68,000	134,260	134,260	139,746	139,746		
MEDICAL/THERAPY(2320)							
Teacher Salary	214,975	221,050	221,050	280,240	280,240	4.0	
Spec. Salary	55,688	56,475	56,475	56,475	56,475	1.7	
Services - ABA Home Support	16,500	16,500	16,500	16,500	16,500		
Services - Home/Hosp. Tutoring	10,000	10,000	10,000	10,000	10,000		
Services - FLLAC	90,000	90,000	90,000	90,000	80,000		PT Services
Services - Vision	55,000	55,000	55,000	55,000	55,000		
Services - Hear./Billing./Ind. Evals.	7,200	7,200	7,200	7,200	7,200		
Services - Vocational/Misc.	7,250	7,250	7,250	7,250	7,250		
Supplies	11,033	11,033	11,033	11,033	11,033		
Equipment	7,025	7,025	7,025	7,025	7,025		
	474,671	481,533	481,533	540,723	530,723		
PARA. (2330)							
Salary - Summer	20,000	20,000	20,000	20,000	16,000		
	20,000	20,000	20,000	20,000	16,000		
PROF. DEVEL. (2357)							
Services	3,000	3,000	3,000	3,000	5,000		
Expenses	0	0	0	0	0		
	3,000	3,000	3,000	3,000	5,000		
INSTR. SUPPLIES (2430)							
Classroom Supplies - District	15,000	15,000	15,000	15,000	10,000		
	15,000	15,000	15,000	15,000	10,000		
INSTRUCT. TECH. (2455)							
Software - District	1,000	1,000	1,000	1,000	1,000		
Hardware - District	3,000	3,000	3,000	3,000	3,000		
	4,000	4,000	4,000	4,000	4,000		
PSYCHOLOGICAL (2800)							
Psych. Salary	148,850	150,600	150,600	150,600	150,600	2.0	
Services Testing	10,500	10,500	10,500	10,500	10,500		
Supplies	11,000	11,000	11,000	11,000	5,000		
Travel	1,500	1,500	1,500	1,500	1,500		
	171,850	173,600	173,600	173,600	167,600		
TUITION - PUBLIC (9100)							
Tuition Public School	35,000	35,000	35,000	35,000	35,000		
	35,000	35,000	35,000	35,000	35,000		
TUITION - OUT OF STATE (9200)							
Tuition Out-of-State	1,000	1,000	1,000	1,000	1,000		
	1,000	1,000	1,000	1,000	1,000		
TUITION - PRIVATE (9300)							
Tuition Private Day/Summer	843,550	843,550	843,550	843,550	932,716		5% OSD inc. + 1 new placements
Tuition Private Residential	465,000	525,650	525,650	525,650	614,816		5% OSD inc. + 1 new placements
	1,308,550	1,369,200	1,369,200	1,369,200	1,547,532		
TUITION - COLLAB. (9400)							
Collaborative Day/Summer	540,000	540,000	540,000	540,000	629,166		5% OSD inc.
Collaborative Membership	0	0	0	0	0		
	540,000	540,000	540,000	540,000	629,166		
	2,906,230	3,045,003	3,041,003	3,105,879	3,346,177	12.7	

**ASRSD FY18
Early Childhood**

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
PS/PK TEACHER (2310)							
Salary PS/PK - Integ. (PH)	65,225	88,948	99,875	102,871	102,871	1.5	
Salary PS/PK - Sep. (LAW)	53,700	55,200	55,200	56,856	56,856	1.0	1 Tuition funded
	118,925	144,148	155,075	159,727	159,727		
PARA. (2330)							
Salary PS/PK (PH)	5,850	0	0	0	0		3.5 FTE grant funded
	5,850	0	0	0	0		
INSTR. SUPPLIES (2430)							
Classroom Supplies	2,500	2,500	2,500	2,500	2,500		
	2,500	2,500	2,500	2,500	2,500		
	127,275	146,648	157,575	162,227	162,227	2.5	

ASRSD FY18

LAW

1-18-17

Function/Location	Cert. FY16	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
PRINCIPAL (2210)							
Principal Salary	96,425	97,925	97,925	100,863	100,863	1.0	
Assist. Prin. Salary	9,000	9,000	86,550	86,550	86,550	1.0	
Admin. Assist. Salary	40,943	42,533	42,533	43,809	43,809	1.5	
Admin. Assist. - Substitute	0	0	0	0	0		
Postage Meter	0	0	0	0	0		
STARBASE Transportation			3,000	3,000	5,000		
Supplies	1,071	1,071	1,071	1,071	1,300		
Postage	1,236	1,236	1,236	1,236	1,250		
Other	350	1,350	1,350	1,350	1,250		
	149,025	153,115	233,665	237,879	240,022		
CURRICULUM LEADERS (2220)							
Salary	10,609	10,611	10,611	10,929	12,376		6 stipends
	10,609	10,611	10,611	10,929	12,376		
CLASSROOM TEACHER (2305)							
Teacher Salary - K to 5	1,004,290	980,791	980,791	1,021,812	1,021,812	16.0	Sch. Choice two teachers
Teacher Salary - Unified Arts	137,158	131,665	201,475	212,594	212,594	3.6	
Tutor Salary	1,500	1,500	1,500	1,500	1,500		
	1,142,948	1,113,956	1,183,766	1,235,906	1,235,906		
SPECIALIST TEACHER (2310)							
Teacher Salary - Reading	104,608	133,800	133,800	146,844	146,844	2.0	
Teacher Salary - SPED	234,185	290,885	290,885	290,885	290,885	6.0	
	338,793	424,485	424,485	437,729	437,729		
SPECIALIST TEACHER (2320)							
Teacher Salary - Speech	74,250	75,450	75,450	77,714	77,714	1.0	
	74,250	75,450	75,450	77,714	77,714		
SUBSTITUTES (2325)							
Salary - Reg. Ed. Teach. - LAW	0	13,000	13,000	13,000	13,000		
Salary - Sp. Ed. Teach. - LAW	0	4,000	4,000	4,000	4,000		
	0	4,000	17,000	17,000	17,000		
PARA. (2330)							
Para. Salary - K	28,353	28,460	28,460	108,953	108,953	3.0	No K- Grant
Para. Salary - Lunch/Recess	10,543	10,770	10,770	11,093	11,093	0.8	
Para. Salary - SPED	0	0	0	0	0		nine positions grant funded
Subs. - LAW	0	10,000	10,000	10,000	10,000		
Para. Salary - Services	0	0	18,000	18,000	18,000		1.0 Merrimack Intern
	38,896	49,230	67,230	148,046	148,046		
LIBRARY (2340)							
Para. - Salary	22,773	23,069	23,069	23,069	23,069	1.0	
Supplies	2,318	2,318	2,318	2,318	1,000		
	25,091	25,387	25,387	25,387	24,069		
PROF. DEVEL. (2357)							
Services	0	0	0	0	0		
Expenses	0	0	0	0	0		
	0	0	0	0	0		
TEXTBOOKS (2410)							
Textbooks	10,000	10,000	10,000	10,000	12,000		
	10,000	10,000	10,000	10,000	12,000		
INSTRUCT. EQUIP (2420)							
Furniture	5,000	5,000	2,000	2,000	5,000		
	5,000	5,000	2,000	2,000	5,000		
INSTR. SUPPLIES (2430)							
Gen. School Supplies	10,000	10,000	14,000	14,000	10,000		
Classroom Supplies	17,500	17,500	17,500	17,500	15,000		
Classroom Supplies - SPED	1,500	1,500	1,500	1,500	2,500		
Classroom Supplies - UA	3,500	3,500	3,500	3,500	4,000		
	32,500	32,500	36,500	36,500	31,500		
INSTRUCT. SOFTWARE (2455)							
Software	1,000	1,000	1,000	1,000	2,000		
	1,000	1,000	1,000	1,000	2,000		
GUIDANCE (2710)							
Guidance Salary	58,200	60,400	60,400	79,877	79,877	1.0	
Supplies	500	500	500	500	500		
	58,700	60,900	60,900	80,377	80,377		
HEALTH (3200)							
Nurse - Salary	62,684	63,884	63,884	65,801	65,801	1.0	
Salary - Subs.	0	0	0	0	0		
Services	0	0	0	0	0		
Supplies	3,000	3,000	3,000	3,000	3,000		
	65,684	66,884	66,884	68,801	68,801		
STUDENT ACTIVITIES (3520)							
Stipends - Salary	1,000	1,000	1,000	1,030	1,030		
Services	0	0	0	0	0		
Supplies	1,500	1,500	1,500	1,500	1,500		
	2,500	2,500	2,500	2,530	2,530		
	1,954,996	2,031,018	2,217,378	2,391,798	2,395,070	38.9	

ASRSD FY18

Page Hilltop

1-18-17

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
PRINCIPAL (2210)							
Principal Salary	99,470	100,970	102,990	106,080	106,080	1.0	
Assist. Prin. Salary	92,875	94,275	85,000	85,000	85,000	1.0	
Admin. Assist. Salary	68,052	69,818	69,818	69,818	69,818	2.0	
Starbase Transportation	5,500	5,500	5,500	5,500	5,500		
Supplies	5,500	5,500	5,500	5,500	5,500		
Dues, Registrations	1,000	1,000	1,000	1,000	1,000		
	272,397	277,063	269,808	272,898	272,898		
CURRICULUM LEADERS							
Salary	10,609	10,611	10,611	10,929	12,376		8 stipends
	10,609	10,611	10,611	10,929	12,376		
CLASSROOM TEACHER (2305)							
Teacher Salary - K - 5	1,601,050	1,599,450	1,549,450	1,510,998	1,510,998	24.0	
Teacher Salary - UA	0	0	50,000	51,500	51,500	1.0	4 FTE in Choice
Tutor Salary	1,500	14,500	14,500	14,500	14,500		
	1,602,550	1,613,950	1,613,950	1,576,998	1,576,998		
SPECIALIST TEACHER (2310)							
Teacher Salary - Reading	0	0	0	0	0		
Teacher Salary - SPED	485,668	461,768	461,768	411,768	411,768	6.0	
	485,668	461,768	461,768	411,768	411,768		
SPEECH & LANGUAGE (2320)							
Teacher - Salary	132,500	136,780	106,200	109,386	109,386	2.0	
Spec. - Salary	48,503	50,159	50,159	50,159	25,000	1.0	
	181,003	186,939	156,359	159,545	134,386		
SUBSTITUTES (2325)							
Salary - Reg. Ed. Teach. - PH	0	20,000	18,000	18,000	18,000		
Salary - Sp. Ed. Teach. - PH	0	6,000	6,000	6,000	6,000		
	0	26,000	24,000	24,000	24,000		
PARA. (2330)							
Salary - K	75,417	70,670	70,670	79,350	79,350	4.0	No K- Grant
Salary - ELL	0	0	0	0	0		
Salary - PH	0	0	0	0	0		
Salary - SPED	236,576	221,706	185,706	96,874	25,000	0.7	4 FTE grant funded
Subs. - PH	0	22,000	18,000	18,000	18,000		
Salary - Services	0	0	18,000	18,000	18,000	1.0	Merrimack Intern 1.0 FTE
	311,993	314,376	292,376	212,224	140,350		
LIBRARY (2340)							
Salary - Para	17,390	17,860	17,860	20,397	20,397	1.0	
Supplies	4,000	4,000	2,000	2,000	2,000		
	21,390	21,860	19,860	22,397	22,397		
TEXTBOOKS (2410)							
Textbooks/Materials	18,000	18,000	19,275	19,275	19,275		
	18,000	18,000	19,275	19,275	19,275		
INSTR. SUPPLIES (2430)							
Gen. School Supplies	25,000	25,000	25,000	25,000	25,000		
Classroom Supplies	15,500	15,500	15,500	15,500	15,500		
Classroom Supplies - SPED	1,500	1,500	1,500	1,500	1,500		
Classroom Supplies - UA	0	0	4,000	4,000	4,000		
	42,000	42,000	46,000	46,000	46,000		
INSTRUCT. SOFTWARE (2455)							
Software	1,000	1,000	1,000	1,000	1,000		
	1,000	1,000	1,000	1,000	1,000		
GUIDANCE (2710)							
Guidance Salary	128,150	131,150	53,600	55,208	55,208	1.0	
Services	500	500	500	500	500		
Supplies	1,500	1,500	1,500	1,500	1,500		
	130,150	133,150	55,600	57,208	57,208		
HEALTH (3200)							
Nurse - Salary	63,559	64,759	64,759	66,702	66,702	1.0	
Sal. - Subs.	0	0	0	0	0		
Supplies	3,000	3,000	3,000	3,000	3,000		
	66,559	67,759	67,759	69,702	69,702		
STUDENT ACTIVITIES (3520)							
Stipends - Salary	0	0	0	0	0		
Services	500	500	500	500	500		
Supplies	1,000	1,000	1,000	1,000	1,000		
	1,500	1,500	1,500	1,500	1,500		
	3,144,819	3,149,976	3,039,866	2,885,444	2,789,858	46.7	

ASRSD FY18 Middle School
1-18-17

Function/Location	Gen. FY16	CerL. FY16	Cer. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
PRINCIPAL (2210)							
Principal Salary	95,250	97,420	97,420	98,365	98,365	1.0	
Assist. Principal Salary	83,000	84,700	84,700	87,241	87,241	1.0	
Admin. Assist. Salary	44,918	46,545	46,545	46,545	46,545	1.5	
Other Salary	500	500	500	500	500		
Postage Meter	0	0	0	0	0		
Postage	2,545	2,545	4,045	4,045	4,045		
Supplies	7,500	7,500	6,000	6,000	6,000		
Travel	1,000	1,000	1,000	1,000	1,000		
	234,713	240,210	240,210	243,696	243,696		
CURRICULUM LEADERS							
Salary	6,984	7,074	7,074	7,286	9,282		six stipends
	6,984	7,074	7,074	7,286	9,282		
CLASSROOM TEACHER (2305)							
Teacher Salary	1,112,291	1,115,281	1,115,281	1,157,893	1,157,893	19.0	
Teacher Salary - UA	0	0	0	0	0		six teachers Sch. Choice funded
Tutor Salary	1,500	1,500	1,500	1,500	1,500		
	1,113,791	1,116,781	1,116,781	1,159,393	1,159,393		
SPECIALIST TEACHER (2310)							
Teacher Salary - ELL	0	0	0	0	0		
Teacher Salary - Reading	76,350	0	0	0	0		
Teacher Salary - SPED	372,360	474,200	474,200	488,426	488,426	8.0	
	448,700	474,200	474,200	488,426	488,426		
SUBSTITUTES (2325)							
Salary - Reg. Ed. Teach. - MS	0	20,000	18,000	18,000	18,000		
Salary - Sp. Ed. Teach. - MS	0	5,000	5,000	5,000	5,000		
	0	25,000	23,000	23,000	23,000		
PARA. (2330)							
Salary - Reg. Ed. Specialists	31,400	31,870	31,870	33,483	33,483	1.0	
Salary - Lunch/Recess	4,073	4,308	4,308	4,437	4,437	0.3	
Salary - SPED	164,141	239,746	221,746	211,746	211,746	9.0	3 FTE grant funded
Subs. - MS	0	10,000	10,000	10,000	10,000		
Salary - Services	0	0	18,000	18,000	18,000	1.0	Merrimack Intern
	199,614	285,924	285,924	277,666	277,666		
LIBRARY (2340)							
Salary - Specialist	52,900	30,700	30,700	30,700	25,700	1.0	
Books	5,000	5,000	2,000	2,000	2,000		
Technology	1,500	1,500	1,500	1,500	1,500		
Supplies	3,318	3,318	3,318	3,318	3,318		
	62,718	40,518	37,518	37,518	32,518		
PROF. DEVEL (2357)							
Services	0	0	1,000	1,000	1,000		
Expenses	0	0	0	0	0		
	0	0	1,000	1,000	1,000		
TEXTBOOKS (2410)							
Textbooks/Materials	4,500	4,500	11,500	11,500	11,000		
	4,500	4,500	11,500	11,500	11,000		
INSTRUCT. EQUIP (2420)							
Furniture	5,000	5,000	0	0	0		
	5,000	5,000	0	0	0		
INSTRUCT. SUPPLIES (2430)							
Supplies General	12,240	12,240	12,240	12,240	12,240		
Supplies Classroom	9,150	9,150	9,150	9,150	9,150		
Supplies SPED	1,500	1,500	1,500	1,500	1,500		
Supplies UA	8,317	8,317	8,317	8,317	8,317		
	31,207	31,207	31,207	31,207	31,207		
INSTRUCT. SOFTWARE (2455)							
Software	4,000	4,000	1,300	1,300	1,300		
	4,000	4,000	1,300	1,300	1,300		
GUIDANCE (2710)							
Guidance Salary	124,950	127,850	127,850	127,850	127,850	2.0	
Other Salary	3,492	3,492	3,492	3,492	3,492		Extra days - Summer
Services - Naviance	0	0	2,700	2,700	0		
Supplies	1,000	1,000	1,000	1,000	3,700		
	129,442	132,342	135,042	135,042	135,042		
HEALTH (3200)							
Nurse Salary	51,496	52,696	52,696	54,277	54,277	1.0	
Services	0	0	0	0	0		
Supplies	1,500	2,500	2,500	2,500	3,000		
	52,996	55,196	55,196	56,777	57,277		
ATHLETICS (3510)							
Salary - Assist. Director	3,075	3,075	3,075	3,167	3,167		
Salary - Coaches	14,350	14,529	14,529	14,965	14,965		
Services	0	0	0	0	0		plus \$10,000 MS revolving
Travel	0	0	0	0	0		
Supplies	2,000	2,000	2,000	2,000	2,000		
	19,425	19,604	19,604	20,132	20,132		
STUDENT ACTIVITIES (3520)							
Stipends - Salary	10,250	10,378	10,378	10,689	10,689		
Services	1,000	1,000	1,000	1,000	1,000		
Travel	0	0	0	0	0		
	11,250	11,378	11,378	11,689	11,689		
GRAND TOTAL	2,324,340	2,427,935	2,450,935	2,505,632	2,502,628	45.8	

**ASRSD FY18
High School
1-18-17**

Function/Location	Cert. FY18	Cert. FY16	Cert. FY17	Jan. Xier FY17	Prelim. FY18	FTEs	Detail
PRINCIPAL (2210)							
Principal Salary	116,725	118,225	118,225	121,772	121,772	1.0	
Assist. Principal Salary	83,000	84,700	84,700	84,700	84,700	1.0	
Secretary Salary	68,450	70,219	70,219	70,219	70,219	2.0	
Services	2,500	2,500	2,500	2,500	0		
Expenses	12,000	12,000	12,000	12,000	12,000		
Dues, Registrations	2,500	2,500	2,500	2,500	5,400		MSSAA, NEASC
Graduation	10,000	10,000	10,000	10,000	10,000		
	285,175	300,144	300,144	303,691	304,091		
CURRICULUM LEADERS							
Salary	15,375	15,625	15,625	16,094	6,235		5 stipends
	15,375	15,625	15,625	16,094	6,235		
CLASSROOM TEACHER (2305)							
Teacher Salary	1,136,750	1,134,250	1,134,250	1,166,278	1,188,278	17.8	1 FTE School Choice
Teacher Salary - UJA	495,162	515,199	515,199	515,199	515,199	8.6	
Tutor Salary	20,000	7,000	7,000	7,210	7,210		
	1,651,912	1,656,449	1,656,449	1,690,687	1,690,687		
SPECIALIST TEACHER (2310)							
Teacher Salary - SPED	306,650	319,250	348,685	408,539	408,539	7.0	
	306,650	319,250	348,685	408,539	408,539		
SUBSTITUTES (2325)							
Salary - Reg. Ed. Teach. - HS	0	20,000	18,000	18,000	18,000		
Salary - Sp. Ed. Teach. - HS	0	3,000	3,000	3,000	3,000		
	0	23,000	21,000	21,000	21,000		
PARA. (2330)							
Para. Salary - SPED	95,989	145,390	145,390	136,390	145,390	4.0	
Subs. - HS	0	2,000	2,000	2,000	2,000		
	169,989	176,825	147,390	136,390	147,390		
LIBRARY (2340)							
Librarian Salary	75,250	77,550	77,550	79,877	79,877	1.0	
Services	2,000	2,000	2,000	2,000	2,000		
Supplies	5,000	5,000	5,000	5,000	5,000		
	82,250	84,550	84,550	86,877	86,877		
TEXTBOOKS (2410)							
Math	7,500	7,500	5,000	5,000	5,000		
Humanities/English	4,500	4,500	17,300	17,300	7,200		
Science	7,500	7,500	9,500	9,500	9,500		
Computer Ed.					1,600		
STEM	2,500	2,500	2,500	2,500	2,500		
World Language	10,000	10,000	5,000	5,000	5,000		
	39,800	39,800	39,300	39,300	30,800		
INSTR. SUPPLIES (2430)							
Math	4,900	4,900	4,900	4,900	4,900		
English	800	800	800	800	800		
STEM	6,000	6,000	6,000	6,000	6,000		
Science	7,000	7,000	7,000	7,000	7,000		
History	1,500	1,500	1,500	1,500	1,500		
Visual Arts	16,500	16,500	11,500	11,500	10,000		
Computer Ed.					2,600		
Band / Choir					1,000		
PE / Wellness					5,000		
Classroom - SPED	1,500	1,500	1,500	1,500	1,500		
	38,200	38,200	33,200	33,200	40,300		
INSTRUCT. SERVICES (2440)							
Services - MWCC	4,000	4,000	4,000	4,000	4,000		
Services - MASS Insight	0	0	5,000	5,000	5,000		
	0	0	9,000	9,000	9,000		
INSTRUCT. SOFTWARE (2455)							
Math	1,190	1,190	1,190	1,190	1,190		
Edgenuity	6,000	6,000	6,000	6,000	6,500		
	7,190	7,190	7,190	7,190	7,690		
GUIDANCE (2710)							
Guidance Salary	146,500	148,900	148,900	153,480	153,480	2.0	Extra days - Summer
Other Salary	3,872	3,872	3,872	3,872	3,872		
Secretary Salary	36,332	37,236	37,236	37,236	37,236	1.0	
Services - Naviance	2,000	2,000	4,500	4,500	4,500		
Supplies	2,510	2,510	2,510	2,510	2,510		
Travel	150	150	150	150	150		
Dues	25	25	25	25	25		
	191,389	194,693	197,193	201,773	201,773		
HEALTH (3200)							
Nurse - Salary	71,150	72,350	72,350	74,521	74,521	1.0	
Supplies	3,000	3,000	3,000	3,000	3,000		
	74,150	75,350	75,350	77,521	77,521		
HS ATHLETICS (3510)							
Salary - Athletic Director	8,201	8,304	8,304	62,500	62,500	1.0	employees
Salary - Prof. Staff	38,900	37,361	37,361	38,482	38,482		
Salary - Coaches	57,093	57,807	57,807	57,807	60,307		
Salary - Trainer			0	0	20,000	.25	Part-time
Services - Officials	10,500	10,500	10,500	10,600	10,500		plus \$20,000 from HS revolving fund
Transportation	10,700	10,700	10,700	10,700	10,700		plus \$10,000 from HS revolving fund
Supplies	7,000	7,000	7,000	7,000	12,000		plus \$10,000 from HS revolving fund
Insurance	4,500	4,500	4,500	4,500	4,500		
Other	14,500	14,500	14,500	14,500	14,500		
	149,394	150,672	150,672	205,989	233,489		
STUDENT ACTIVITIES (3520)							
Stipends - Clubs, Extra-curricular	20,500	20,756	20,756	21,379	21,379		
Services	1,500	1,500	1,500	1,500	1,500		
Supplies	500	500	500	500	500		
	22,500	22,756	22,756	23,379	23,379		
	3,043,974	3,081,504	3,108,504	3,262,830	3,288,771	51.4	

**ASRSD FY18
Other Districts**

Function/Location	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	Detail
OTHER DISTRICTS (9100)						
Tuition - Public Schools	45,260	20,000	0	0	0	Tuition program phased out
Tuition - Choice	838,750	785,000	741,094	741,094	741,094	FY17 Gov.Budget Proposal
Tuition - Charter	950,000	1,071,200	1,027,835	1,027,835	1,027,835	FY17 Gov.Budget Proposal
	1,834,010	1,876,200	1,768,929	1,768,929	1,768,929	

ASRSD FY18 Transportation

1-18-17

Function 3300 Transportation	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	
Reg. Trans. In District	642,732	660,000	671,220	671,220	684,644	2% CPI
Out of District (Homeless)	15,000	15,000	45,000	25,000	45,000	
SPED Transportation	625,000	658,000	722,592	722,592	750,000	4%
	1,282,732	1,333,000	1,438,812	1,418,812	1,479,644	

ASRSD FY18 Capital Debt

1-18-17

Capital - Facil. Debt	Total	Ayer	Shirley	Allocation Per Agreement
Interest - HS Debt	1,395,619	984,007	411,612	Based on 50% Found. Enroll & 50% Resid. Enroll. Appropriation From Shirley Stabilization Fund
Stab. Fund - HS Debt	-13,640		-13,640	
FY18	1,381,979	984,007	397,972	
FY17	1,378,304	1,004,944	373,360	
FY16	1,380,054	1,011,879	368,175	
FY15	1,379,836	1,015,018	364,818	Shirley applied \$13,640 towards \$378,458 share

		Total	Ayer	Shirley		
HS Debt	July, 2017	Prin./Int.	1,395,619	836,947	558,672	HS debt - 60% Ayer 40% Shirley
	Ayer	MS Debt	0	147,060	(147,060)	Ayer's 55.2% Share of Shirley MS Debt of \$266,463
	Shirley	Stab. Fund	(13,640)		(13,640)	Shirley's application of Stab. Fund against debt (to be BOS approved)
MS & HS Debt Subtotal			1,381,979	984,007	397,972	

FOUNDATION AND RESIDENT ENROLLMENT BLEND

		FY17 Found./Resid. Enroll. Blend	Ayer	Shirley
HIGH SCHOOL	Foundation Enrollment		57.1%	42.9%
	Resident Enrollment		62.8%	37.2%
	50% Blend		60.0%	40.0%
		FY17 Found./Resid. Enroll. Blend	Ayer	Shirley
MIDDLE SCHOOL	Foundation Enrollment		57.1%	42.9%
	Resident Enrollment		53.6%	46.4%
	50% Blend		55.2%	44.8%

FOUNDATION AND RESIDENT ENROLLMENT DATA

		Found. Enrc	10/01/12	10/01/13	10/01/14	10/01/15	10/01/16	Share
REGION ALL SCH.	Ayer		1009	1015	1015	1000	1015	57.1%
	Shirley		759	756	724	758	797	42.9%
	ASRSD		1768	1771	1739	1758	1812	100.0%
	Ayer		57.1%	57.3%	58.4%	56.9%	56.0%	
	Shirley		42.9%	42.7%	41.6%	43.1%	44.0%	

		Resid. Enrol	FY13	FY14	FY15	FY16	FY17	Share
HIGH SCHOOL	Ayer		188	193	212	228	213	62.8%
	Shirley		98	111	108	139	156	37.2%
	ASRSD		286	304	320	367	369	100.0%
	Ayer		65.7%	63.5%	66.3%	62.1%	57.7%	
	Shirley		34.3%	36.5%	33.8%	37.9%	42.3%	

		Resid. Enrol	FY13	FY14	FY15	FY16	FY17	Share
MIDDLE SCHOOL	Ayer		220	205	202	179	199	53.3%
	Shirley		172	179	184	170	177	46.7%
	ASRSD		392	384	386	349	376	100.0%
	Ayer		56.1%	53.4%	52.3%	51.3%	52.9%	
	Shirley		43.9%	46.6%	47.7%	48.7%	47.1%	

ASRSD FY18 Capital - Other
1-18-17

Capital - All Other	Total	Ayer	Shirley	
Equipment	0	0	0	50% Foundation Enrollment Share - five year average 50% Combined Effort Yield Share (DESE) - five-yr. avg.
FY18 Prelim.	0	0	0	
FY17 Cert.	0	0	0	
FY16 Cert.	0	0	0	
FY15 Cert.	0	0	0	

Comb. Effort Yield*	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	Five-Year Avg.
Ayer	5,425,335	5,528,110	5,686,048	5,951,816	5,825,008	6,080,709	6,479,518	6,857,602	
Shirley	3,853,926	4,077,423	4,236,370	4,424,740	4,390,697	4,490,913	4,649,675	4,804,031	-100.0%
ASRSD	9,279,261	9,605,533	9,922,418	10,376,556	10,215,806	10,571,622	11,129,193	11,661,633	
Summary	FY07	FY08	FY09	FY10	FY11	FY12	FY13	FY14	
Ayer - %	58.6%	57.6%	57.3%	57.4%	57.0%	57.6%	58.2%	58.8%	57.78%
Shirley - %	41.5%	42.4%	42.7%	42.6%	43.0%	42.5%	41.8%	41.2%	42.22%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
* per DESE foundation budget									

dropped dropped dropped
from from from
formula formula formula
for FY14 for FY15 for FY16

ASRSD FY18 Revolving Funds

1-18-17

Source/Function	Cert. FY15	Cert. FY16	Cert. FY17	Jan. Xfer FY17	Prelim. FY18	FTEs	Detail
CIRC. BREAKER							
Collab. Tuition (9300)	660,000	780,000	780,000	780,000	780,000		
	660,000	780,000	780,000	780,000	780,000		
SCHOOL CHOICE							
LAW Teacher Salary (2305)	161,021	153,829	153,829	153,829	153,829	2.0	
PH Teacher Salary (2305)	188,130	204,150	204,150	204,150	204,150	4.0	
MS Teacher Salary (2305)	430,053	435,442	435,442	435,442	435,442	6.0	
HS Teacher Salary (2305)	0	0	0	0	57,650	1.0	
	779,204	793,421	793,421	793,421	851,071		
ACP/EXT. DAY							
Cust. Salary (4110)	0	0	0	0	0		
PH/LAW Heat (4120)	17,000	17,000	17,000	17,000	17,000		ACP \$12,000; Ext. Day \$5,000
PH/LAW Electric (4130)	28,000	28,000	28,000	28,000	28,000		ACP \$21,000; Ext. Day \$7,000
Retirement (5100)	15,440	15,720	15,720	15,720	15,720		ACP \$13,440; Ext. Day \$2,280
Health Insurance - ACP	53,460	54,168	54,168	54,168	54,168		
	113,900	114,888	114,888	114,888	114,888		
EARLY LEARN. CTR.							
Teacher Salary (2305)	72,250	73,450	73,450	73,450	73,450	1.0	one teacher
Spec. PS/PK Salary (2330)	29,628	30,824	30,824	30,824	30,824	1.0	one paraprofessional
	101,878	104,274	104,274	104,274	104,274		
RENT							
Cust. Salary OT (4110)	0	0	0	0	0		
Heat PH (4120)	41,500	41,500	41,500	41,500	41,500		
Heat LAW (4120)	7,500	7,500	7,500	7,500	7,500		
Heat MS (4120)	0	0	0	0	0		
Electric MS (4130)	0	0	0	0	0		
	49,000	49,000	49,000	49,000	49,000		
MS ATHLETICS							
Salary & Services (3510)	10,000	10,000	10,000	10,000	10,000		
	10,000	10,000	10,000	10,000	10,000		
HS ATHLETICS							
Salaries (3510)	0	0	0	0	0		
Services (3510)	20,000	20,000	20,000	20,000	20,000		
Supplies (3510)	10,000	10,000	10,000	10,000	10,000		
Travel (3510)	10,000	10,000	10,000	10,000	10,000		
	40,000	40,000	40,000	40,000	40,000		
EXCESS & DEFICIENCY							
SPED Transportation (3300)	0	0	0	0	0		special education transportation
Other Districts (9300)	0	0	0	0	0		special education tuition
	0	0	0	0	0		
Total	1,753,982	1,891,583	1,891,583	1,891,583	1,949,233	15.0	
District Capital Stabilization							
Maintenance of Bldgs. (4220)	0	0	200,000	200,000	200,000		Transfer approved by RSC 12/16/15
	0	0	200,000	200,000	200,000		

ASRSD FY18 Grants
1-18-17

#	FEDERAL GRANTS	Sal.	Sal.	Sal.	Sal.	Exp.	Exp.	Exp.	Exp.	Prelim.		Jan. Xfer	Cert.	FY16	FY18	
		Admin.	Teacher	Stipend	Para	Services	Supplies	Other	MTRS/Bus	FY18	FTEs	FY17	FY17	Cert.	Cert.	
140	Teacher Quality			46,755		9,000	7,236	5,000	1,184	69,175	0.0	69,175	69,175	69,175	70,063	
240	Spec. Educ.				340,553	115,241				455,794	15.0	455,794	455,794	455,794	449,321	
274	Sp. Ed. Prog. Imp.					13,346				13,346	0.0	13,346	13,346	13,346	7,172	
298	Sp. Ed. Prog. Imp.					5,600				5,600	0.0	5,600	5,600	5,600	2,900	
305	Title One		153,692	4,557	34,100	29,000	8,821	4,000	44,242	278,412	3.6	278,412	278,412	278,412	246,823	
											822,327	18.6	822,327	822,327	822,327	776,279

#	STATE GRANTS	Sal.	Sal.	Sal.	Sal.	Exp.	Exp.	Exp.	Exp.	Prelim.		Cert.	Cert.	FY16	FY18	
		Admin.	Teacher	Stipend	Para/Adm.	Services	Supplies	Equ. Trav.	Other	FY18	FTEs	FY17	FY17	Cert.	Cert.	
237	MA Family Network	44,268				43,892	4,300	9,040	1,900	2,500	105,900	2.2	105,900	105,900	89,000	104,528
262	Early Childhood					23,982					23,982	0.8	23,982	23,982	23,982	23,525
391	Preschool					71,930					0	0.0	71,930	71,930	71,930	66,423
625	Academic Support		1,823			840		537		3,000	6,200	0.0	6,200	6,200	10,300	
701	Kindergarten					68,650					0	0.0	68,650	68,650	80,000	90,318
											136,682	3.0	276,662	276,662	271,112	295,092

206 - Ed Jobs
738 - Curr.

Total	959,409	21.6	1,093,989	1,096,989	1,093,439	1,071,371
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ASRSD FY18 Foundation Enrollment 1-18-17

Found. Enrollment Detail	FY14	FY15	FY16	FY17	FY18
Ayer Total					
Ayer Vocational*					
Ayer - ASRSD	1009	1015	1015	1000	1015
Shirley Total					
Shirley Vocational*					
Shirley - ASRSD	759	756	724	758	797
Ayer + Shirley - ASRSD	1768	1771	1739	1758	1812
Summary	FY14	FY15	FY16	FY17	FY18
Ayer - ASRSD	1009	1015	1015	1000	1015
Shirley - ASRSD	759	756	724	758	797
Ayer - %	57.1%	57.3%	58.4%	56.9%	56.0%
Shirley - %	42.9%	42.7%	41.6%	43.1%	44.0%

5 Yr. Avg.
1770
1011
759
57.1%
42.9%

57.1%
42.9%

Oct. 1 2012	Oct. 1 2013	Oct. 1 2014	Oct. 1 2015	Oct. 1 2016
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FY14 thru FY18



Foundation Budget Review Commission

Final Report

October 30, 2015

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

Overview

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.

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.

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.⁵ In actuality, around 16% of students receive some level of in-district special education services statewide⁶, 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 \$25,454.⁷ 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:

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

⁵ 15% x 25% = 3.75%

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

⁷ 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.

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

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.

- 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.

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.

Appendix A

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 1st 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.

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.