

UXBRIDGE SCHOOL COMMITTEE
April 26, 2016
UXBRIDGE HIGH SCHOOL LIBRARY

Posted by
Uxbridge
Town Clerk

School Committee Members in Attendance:

	Present	Absent
Melanie King, Chair	X	
Sean Dugan, Vice Chair	X	
Debbie Stark, Secretary	X	
Jane Keegan, Member	X	
Charlene Miller, Member	X	
Jen Modica, Member	X	
Michelle Taparausky, Member		X

1. Call to Order

Ms. King called the meeting to order at 7:01PM

2. Executive Session

Ms. King entertained a motion to enter into executive session to hear a presentation on new school security protocols with new business to follow. Mr. Dugan moved the motion. Ms. Modica seconded the motion. By roll call vote: Ms. Modica-YES, Ms. Stark-YES, Mr. Dugan-YES, Ms. Miller-YES, Ms. Keegan-YES, Ms. King-YES

The Committee entered into executive session at 7:02PM.
 The Committee re-entered regular session at 7:27PM.

3. Public Comment

Pam Yukna, Teachers Union president, read a statement expressing the disappointment some teachers felt with the presentation and the eventual discussion at the last School Committee meeting in regards to Math instruction at Taft ELC.

Peter Demers requested information on the following:

1. The location of winter sports checks during the time they were handed over to central office, but not yet deposited
2. The Whitin and Taft implementation plan for Math in Focus

3. Whether any root causes had been determined for the potential failings surrounding Math in Focus implementation

4. Superintendent's Report

-School, District, and Affiliate Fundraising Practices

Mr. Carney noted that current fundraising policy language requires student fundraising to be approved by his office. He noted that although this is the existing policy, it has not been practiced for many years. He asked the Committee to determine whether this is the type of language they want to keep in place, or if they wanted to revise the policy.

-Strategic Planning Update 2016-2019

Mr. Carney presented a packet to the Committee that outlines areas in the district he and the administration team believe will be a district focus over the upcoming 3 years.

-MASS Position on Common Core

*Document outlining the Massachusetts Association of School Superintendent's position is attached to these minutes

5. Business Manager's Update

The new water well and its supporting electric have been installed at the high school. The final billing has not been completed but Mr. Sawyer anticipates it will come very close to the budgeted amount.

Mr. Sawyer apologized for the late deposit of the winter athletic checks and admitted that after further investigation he actually received the checks from the Athletic Director in mid-December, not late January/early February as had been previously stated.

Mr. Sawyer said that lease language for the pending central office lease is being drafted.

Mr. Sawyer said a regular cycle audit performed on the school lunch program was performed by DESE in February and March 2016. One of the issues showed that the district is currently rolling over uncollected debt from year to year. This requires action. All school food authorities in the Commonwealth must resolve debt at the end of each school year by offsetting all bad debt costs incurred by food service operations from sources outside of the nonprofit school fund service account, such as the general fund. It cannot be carried over from year to year. The district currently has \$3,090 in uncollected debt.

6. Electronic Payment Options -- Student Fees

Passed over

7. Budget Subcommittee Recommendations

-Non-union personnel salaries

The budget subcommittee recommended that an amount, no more than \$24,687.97, be set aside for the 21 out of 30 non-union district employees that are eligible for raises.

Mr. Dugan made a motion that the School Committee approve the recommendation of the budget subcommittee to provide nonunion personnel salaries a maximum of a 2% increase in the total maximum amount of 24, 687.97. Ms. Miller seconded the motion. The Committee voted in favor of the motion 6-0-0. The motion passed.

8. Resolution Calling for Full Funding of the Foundation Budget Review Commission - (A)

Mr. Dugan made a motion that the Uxbridge School Committee call on the Massachusetts legislature and the Governor of Massachusetts to fully fund and adopt the recommendations of the Foundation Budget Review Commission in the immediate future. Ms. Keegan seconded the motion. The Committee voted in favor of the motion 6-0-0. The motion passed.

9. Policy Subcommittee Recommendations - (A)

-Community Use of Facilities - Policy KF - 2nd Reading

Mr. Dugan made a motion that the School Committee approve the changes made to Community Use of Facilities, Policy KF, in its second reading. The Committee voted 6-0-0 in favor of the motion. The motion passed.

-Student Admissions - Policy JF - 2nd Reading

Mr. Dugan made a motion that the School Committee approve Student Admissions, Policy JF, in its second reading. The Committee voted 6-0-0 in favor of the motion. The motion passed.

-Student Activity Accounts - Policy JJF - 2nd Reading

Mr. Dugan made a motion that the School Committee approve policy JJF, Student Activity Accounts, in its 2nd reading. The Committee voted 6-0-0 in favor of the motion. The motion passed.

-UHS Graduation Requirements - Policy IGD-A - 1st Reading

Passed over

-School Choice In - Policy JFBB - Vote to determine Choice seats per grade

Passed over

10. Old/New Business

Ms. Keegan recognized Zachary Roerden who is the Northeast essay winner in the National Society of the Daughters of the American Revolution American History essay contest. His essay has been sent to Washington, D.C. for further consideration in the contest.

Ms. Stark requested the policy subcommittee examine the existing policy regarding funding and participation of district athletes in co-op sports.

Ms. King said that all Superintendent evaluations have been submitted and she will be going over the composite with Superintendent Carney on April 28. The composite will be read to the public at the May 3, 2016 regular meeting.

11. Meeting Minutes -1/19/2016, 3/10/2016, 3/15/2016, 4/5/2016

Executive Session Meeting Minutes - 11/17/15, 1/5/16, 1/19/16, 2/23/16

Passed over. Executive session minutes will be approved in a future executive session.

12. Next School Committee Meeting - May 3, 2016

13. Adjournment

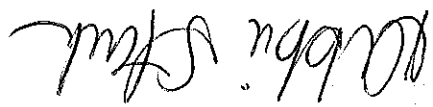
Mr. Dugan made a motion to adjourn into executive session with no new business to follow. Ms. Modica seconded the motion. By roll call vote: Ms. Modica-YES, Ms. Stark-YES, Mr. Dugan-YES, Ms. Miller-YES, Ms. Keegan-YES, Ms. King-YES

The Committee entered into executive session at 8:58PM.

14. Executive Session

-Business Manager's Contract

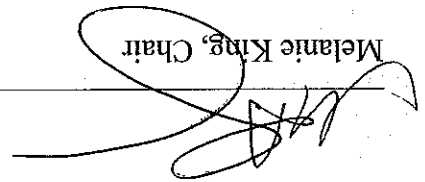
Respectfully Submitted,



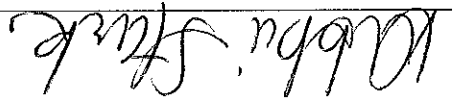
Debbie Stark

Uxbridge School Committee Secretary

School Committee Members:



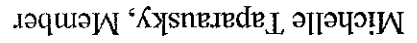
Melanie King, Chair



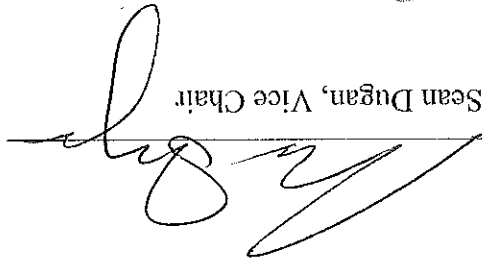
Debbie Stark, Secretary



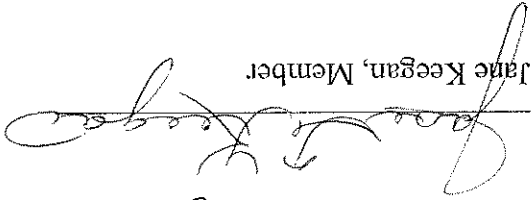
Charlene Miller, Member



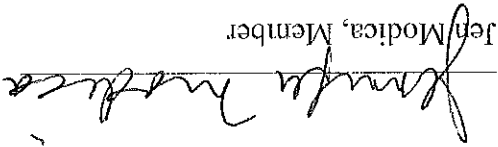
Michelle Taparowsky, Member



Sean Dugan, Vice Chair



Jane Keegan, Member



Jen Modica, Member

STUDENT FUND-RAISING ACTIVITIES

In general, the Committee disapproves of fund-raising in the community by students for school activities. Especially discouraged is the sale of goods produced by companies for profit, such as magazines, candy, and similar items.

Exceptions to this policy will be:

1. Sale of tickets to scheduled athletic events and school dramatic and musical performances.
2. Sale of advertising space in school publications.
3. A fund-raising activity approved by the Superintendent.
4. Proposals to raise funds for charitable purposes or for benefit of the school or community (for example: American Field Service activities, United Nations, or scholarship funds) provided such proposals have been individually approved by the building Principal and Superintendent.

No money collections of any kind may be held in the schools without the specific consent of the Superintendent.

CROSS REFS.: JP, Student Gifts and Solicitations
KHA, Public Solicitations in the Schools

IMPACT ON STUDENT LEARNING

<p>HARD/HIGH IMPACT</p> <ul style="list-style-type: none"> • WRITING NEW SCIENCE CURR. K-5 (COST over next 3 years???) • CURRICULUM ARTICULATION (horizontal/vertical) (No estimated additional cost overall) • Expand <i>MATH IN FOCUS</i> in Grades 6-8 and strengthen training in <i>MATH IN FOCUS</i> K-8 (\$32,000 over next 3 years) • Technology Integration Specialists and school/home supports (Cost over \$210,000) 	<p>EASY/HIGH IMPACT</p> <ul style="list-style-type: none"> • MATH FLEXIBLE GROUPING - GRADES 4 & 6 (No additional cost) • College & Career Readiness Activities (No additional cost) • Instructional skill development/training in literacy for all teachers district-wide (No additional cost; see attached) <p>NO ESTIMATED ADDITIONAL COST OVERALL</p>
<p>HARD/LOW IMPACT</p> <ul style="list-style-type: none"> • IMPROVE TAFT TECHNOLOGY INFRASTRUCTURE - (\$150,000) • REPLACE OLD TECHNOLOGY EQUIPMENT DISTRICT-WIDE (\$300,000) • EXPAND BANDWIDTH (\$48,400) • REPLACE PHONE SYSTEM DISTRICT-WIDE (\$49,000) • INCREASE HVAC STAFF (\$60,000) • CAFETERIA EQUIPMENT REPLACEMENT (Cost over the next 3 years???) • ROOF REPLACEMENT - WHITIN/MMS (\$7 million) • BOILER REPLACEMENT - TAFT/MMS (\$160,000) <p>The category for this list could be debated regarding the impact on student learning. We need to discuss the focus of instructional staff with these efforts.</p>	<p>EASY/LOW IMPACT</p>

EASE OF IMPLEMENTATION

SKELETON PROMPT

You have now read _____ about _____.

Tell the number and kind of texts.

Tell the topic(s) of the text(s).

Write an essay explaining how _____.

Tell what literacy criteria you want students to analyze.

For support, see the LITERACY CRITERIA CHART below.

Be sure to cite evidence/use details from the _____ to support your answer.

Again, tell the number and kind of texts.

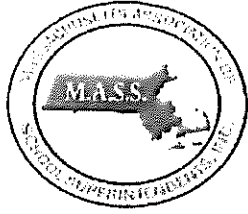
LITERACY CRITERIA CHART

Language Arts Criteria	Social Studies	Science	Art	General
<p>How the author(s)...</p> <ul style="list-style-type: none"> • Establishes tone • Creates mood • Creates suspense • Uses language to ... • Develops the character(s) • Uses point of view to • Uses a controlling symbol to • Uses allusion to connect the theme of this text to... • Establishes his voice as friendly, authoritative, deceptive, or... • Uses sound devices to • Employs a narrator who... • Arrives at a theme of....through the use of... 	<p>How the author(s)...</p> <ul style="list-style-type: none"> • Constructs his argument • Uses key ideas and details to... • Uses language to evoke sympathy or patriotism or • Contrasts the beliefs • Generates interest in... • Uses pictures, graphs, charts or other text features • Uses historical references to... • Establishes his credibility with his audience through the use of data, details, historical references, etc. • Defines the period through use of...picture, language trends, graffiti, or... 	<p>How the author(s)...</p> <ul style="list-style-type: none"> • Constructs his argument • Uses key ideas and details to... • Generates interest in... • Uses graphs or charts to illustrate • Uses subheadings to • Explains a process by... • Explains how one process is similar to another by... • Uses metaphor to show a scientific concept 	<p>How the artist...</p> <ul style="list-style-type: none"> • Uses line to define... • Uses light to create mood, highlight some aspect of the painting, or... • Employs colors that contrast, complement, or ... • Defines a cultural ideal through the use of... • Tells a story through some visual (painting, photograph, tapestry...) 	<p>How the text(s)...</p> <ul style="list-style-type: none"> • Put forth contrasting arguments • Offers key ideas and details to...influence, persuade, explain, or... • Offers pictures, graphs, or charts to ... • Illustrates the complexity of the topic through the use of domain specific vocabulary • Illustrate the diverse thinking among two or more authors.

	Taft	Whitin	McCloskey	UHS
<p>Close Reading Instruction End of Year Benchmarks</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> Identify genres, fiction and non-fiction Identify features of each genre Explain both orally and in writing what a text says Extrapolate evidence from a text, both verbally and in writing Perform these tasks comparing two or more texts 	<p>Students will be able to:</p> <ul style="list-style-type: none"> Identify genres, fiction, and nonfiction texts such as textbook, news article, diary, biography, etc. Identify text features and text structures associated with each genre Summarize what a text says, both orally and in writing Extrapolate evidence, both through paraphrasing and directly quoting Perform these tasks comparing two or more texts 	<p>Students will be able to:</p> <ul style="list-style-type: none"> Identify genres, fiction, poetry, plays, and nonfiction texts such as textbook, news article, diary, biography, autobiography, etc. Identify text features and text structures associated with each genre, and tell how these text features and structures influence the reading of the text Summarize what a text says, both orally and in writing Extrapolate evidence, both through paraphrasing and directly quoting and analyze that evidence-whether literary or informational. Perform these tasks comparing and contrasting two or more texts 	<p>Students will be able to:</p> <ul style="list-style-type: none"> Identify genres, fiction, poetry, plays, and nonfiction texts such as textbook, news article, diary, biography, autobiography, etc. Identify text features and text structures associated with each genre, and tell how these text features and structures influence the reading of the text Understand the disciplinary skills requisite to read effectively science, social studies, literary, or technical texts, for Summarize what a text says, both orally and in writing Analyze one or more complex texts and create new meaning from those texts Extrapolate evidence, both through paraphrasing and directly quoting and analyze that evidence-whether literary or informational. Perform these tasks comparing and contrasting two or more texts

<p>Writing to Narrative Text End of Year Benchmarks</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Write fictional pieces using the following elements: narrator, dialogue, description, setting, and character development • Talk about each of those elements with an understanding of their important 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Write fictional pieces using the following elements: narrator, dialogue, description, setting, and character development • Write fictional pieces that extend an author's narrative; or, rewrite an author's narrative from a different point of view. In completing this tasks, students will (1) keep characters true to the original, (2) emulate the author's use of dialogue and setting, and (3) be certain to resolve the original text's conflict. 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Write fictional pieces using the following elements: narrator, dialogue, description, setting, tone, mood, irony, character development, and language devices—metaphor, simile, hyperbole, and more. • Write fictional pieces that extend an author's narrative; or, rewrite an author's narrative from a different point of view. In completing this tasks, students will (1) keep characters true to the original, (2) emulate the author's use of dialogue, language, tone, mood, irony and/or setting, and (3) be certain to resolve the original text's conflict. 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Write fictional pieces using the full array of literary and language devices • Write fictional pieces that extend an author's narrative; or, rewrite an author's narrative from a different point of view. In completing this tasks, students will (1) keep characters true to the original, (2) ensure that the voice of the piece is apropos of the story's teller, (3) expand upon unique uses of literary and language devices, which would be typical of this author, and (4) be certain to resolve the original text's conflict.
<p>Writing to Informational Text End of Year Benchmarks</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Read informational texts and with teacher support identify both orally and writing main ideas of these texts • Read informational texts and write summaries that include the most important details • Read informational text 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Read informational texts and identify both orally and in writing, main ideas of these texts • Read informational texts and write summaries that include the most important details and expand upon or make meaning 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Read informational texts and identify, both orally and in writing, main ideas and all supporting details of these texts • Read informational texts and write summaries and analyses that include the most important details and 	<p>Students will be able to:</p> <ul style="list-style-type: none"> • Read informational texts and identify, both orally and in writing, main ideas and all supporting details of these texts • Read informational texts and write summaries and analyses that include the most important details and expand upon or make meaning of these

<p>and write summaries that are well organized</p> <ul style="list-style-type: none"> Read informational text and write summaries that use correctly the vocabulary of the text <i>As early as grade two students should use the MEET format when writing about science and social studies texts.</i> 	<p>of these details</p> <ul style="list-style-type: none"> Read informational text and write summaries that are well organized Read informational text and write summaries that use correctly the vocabulary of the text or of the discipline. 	<p>expand upon or make meaning of these details</p> <ul style="list-style-type: none"> Read informational text and write summaries and analyses that are well organized Read informational text and write summaries and analyses that use correctly the vocabulary of the text or of the discipline. 	<p>details</p> <ul style="list-style-type: none"> Read informational text and write summaries and analyses that reflect true disciplinary literacy. Read informational text and write summaries and analyses that use with ease all domain specific vocabulary, including vocabulary not offered in the text itself.
<p>Writing about Literature End of Year Benchmarks</p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> Read fictional texts and identify how the author has used the following elements: narrator, dialogue, description, setting, and character development. <p><i>As early as grade two students should use the MEET format when writing about literary elements such as narrator or characters.</i></p>	<p>Students will be able to:</p> <ul style="list-style-type: none"> With teacher support, read fictional texts and analyze how the author has used the following elements: narrator, dialogue, description, setting, character development, tone, mood, symbol, and irony. With teacher support, Read poetry and determine orally and in writing how the poet has used rhyme, rhythm, imagery, diction, and figurative language. 	<p>Students will be able to:</p> <ul style="list-style-type: none"> Read fictional texts and analyze to what ends the author has used the following elements: narrator, dialogue, description, setting, character development, tone, mood, symbol, and irony. (For example, does the setting contribute to the mood? or does the dialogue contribute to the tone? or does the controlling symbol contribute to the theme?) Read poetry and determine in writing how the poet has used rhyme, rhythm, imagery, and diction, persona, setting, tone, and mood to achieve poetic ends.



Massachusetts Association of School Superintendents

M.A.S.S. Supports the Common Core

Background

In 2010, the Massachusetts Board of Education adopted the most *comprehensive, focused, and rigorous* blueprint of learning standards in the history of the Commonwealth. In 2011, teachers and administrators took on the challenge of implementing curriculum maps, instructional strategies, and a variety of assessments designed to prepare all students for college, career, and *civic* readiness. To dismantle this work, to reverse the forward momentum we have, M.A.S.S. feels is wrong. Massachusetts played a significant role in the drafting of the Common Core with the current Massachusetts Curriculum Frameworks, a byproduct of that work.

Defense of the Common Core and the Massachusetts Frameworks

Our support of the standards outlined in the Common Core and the current Massachusetts Frameworks is summed up in three points: they are comprehensive, rigorous, and fiscally responsible.

Comprehensive. The new frameworks insist on a “shared responsibility” for a set of core competencies – reading, writing, problem solving, speaking, listening, and language – that transcend the boundaries of all curricula areas and ensures transferable skills from grade to grade and subject to subject. This new framework establishes the foundation for the balanced civic discourse we so need.

Rigorous. The current Massachusetts frameworks advance expectations to meet the new demands of the information age. The new standards place greater emphasis on informational texts, arguments, evidence and reasoning, research, collaboration, and multimodal communication. All of this must be done with tasks of increasing complexity and greater student independence.

Fiscally responsible. Millions of dollars have been invested in developing the current standards, revising curricula, and training teachers. The investment in professional development for teachers was very expensive but made reasonable with Race To The Top (RTTT) monies. Any change now would require millions of dollars to reinstate the prior standards, retrain teachers, and reconstruct curricula.

If we are to graduate citizens prepared to meet the demands of democracy in the age of multimedia, we will do so not by returning to the past, but by accepting the challenge of our current Massachusetts Curriculum Frameworks and empowering our students, teachers, and administrators to continue to engage in effective change.



Massachusetts Association of School Superintendents

Common Core Repeal Ballot Question - Talking Points

In November, a question will appear on the ballot that will ask voters if they want to repeal the state's adoption of the Common Core State Standards and go back to using education standards from 2001 and 2004.

If passed, it would turn back the clock on critical education improvements that the majority of teachers and principals support.

The ballot measure is detrimental because if passed it would:

Force all schools to go back to using academic standards from 2001 and 2004 that are not aligned with college and workforce expectations.

Squander six years of hard work by educators and school districts who have invested considerable time and money aligning lesson plans, materials, report cards, and assessments to these standards.

Waste money districts have spent and countless hours educators have spent on professional development to improve curriculum and instruction so students can meet the higher bar set by these standards.

Cause mass confusion in our schools as they have to throw out new lesson plans and materials, and scramble to develop lessons and obtain materials aligned to 15 year-old standards.

Put our children behind their peers in other states who are moving ahead with these newer, more challenging standards that are aligned to college and workforce expectations.

A regular process is already in place to revise the standards.

A regular process already exists to review and update the standards, and a review of the 2010 standards is underway.

DESE is seeking the input of educators and community stakeholders from across the state to review the English language arts (ELA) and math standards. Anyone can weigh in if they have concerns.

[Click Here to Link to DESE's Feedback Survey Form](#)



By Corin Cook/Daily News Staff

Print Page

February 23, 2016 12:55PM

School Committee advocating for Common Core

The Mendon-Upton Regional School District plans to advocate in favor of the Common Core state standards, leading up to a November ballot question that could potentially repeal the standards in the state.

At a school committee meeting Monday, Mendon-Upton Regional School District Superintendent Joseph Maruszczak brought to the committee's attention that the November ballot will have a question that, if approved, will repeal Common Core in the state.

A proponent of Common Core in his school district, Maruszczak said that if passed, the ballot question would have detrimental effects on the school district because of "how important they (the standards) are, how well researched and how they really represent an evolution in the state's progression of really thinking deeply about how kids read, write, problem solve, process information."

If passed, the school district would have to "revert back to the old 2004 standards," which Maruszczak said would be "a significant step backwards."

He added that the school district has also "invested about \$200,000 to \$250,000 just in curriculum materials alone" to implement the standards.

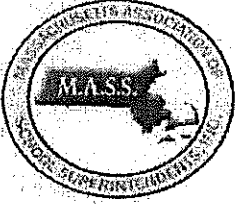
The reason that there is opposition to Common Core because it is "very much a political issue that it is seen on the right as a federal overreach."

Maruszczak pointed out, however, that the Common Core, which is commonly credited to the Obama administration, is in fact a product of the National Council of Governors, which was at the time, led by Republican Gov. Jeb Bush.

Maruszczak asked that the committee work to put "factual information out about this" to parents and residents who may be unaware of common core's importance in the months leading up to the election.

"With regard to the life of this school district and the life of public education across the Commonwealth this ballot initiative is extremely important," he said.

Corin Cook can be reached at ccook@wickedlocal.com or 508-634-7521. Follow her on Twitter @corincook_MDN.



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Foundation Budget Review Commission

Final Report

October 30, 2015

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ACKNOWLEDGEMENTS

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

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

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Senator Sonia Chang-Díaz
Co-Chairs

Representative Alice H. Peisch

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

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

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

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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.

Legislative Charge

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

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

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

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

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

Process and Method

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

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

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

Findings & Recommendations

– PART A –

Foundation Budget Changes

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

I. Health Insurance

Findings

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

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

Recommendations

1. Adjust the employee health insurance rate captured in the “Employee Benefits/Fixed Charges” component of the formula to reflect the average⁴ Group Insurance Commission (GIC) rate* ;

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

² *Ibid.*

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

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

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

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

II. Special Education

Findings

Foundation enrollment accounts for the additional costs of providing special education services through an assumed rate of district enrollment, rather than an actual count of students. A district’s foundation enrollment is multiplied by 3.75% to add additional special education resources to the foundation budget. This translates to an assumption that 15% of students receive in-district special education services 25% of the time.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.

II. Budget Impact Summary: Health Insurance and Special Education Changes

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

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

IV. English Language Learners

Findings

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

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

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

Recommendations

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

V. Low-Income Students

Findings

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

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

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

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

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

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

Recommendations

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

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

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

– PART B –

EFFICIENT AND EFFECTIVE RESOURCE ALLOCATION

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

Data Collection Recommendations

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

Stakeholder Data Advisory Group Recommendations

1. *Establish Stakeholder Data Advisory Committee*
The Department of Elementary and Secondary Education (DESE), in collaboration with the Executive Office of Education (EOE), should convene a Stakeholder Data Advisory Committee to promote effective resource allocation decisions at the local level
2. *Purpose of Data Advisory Committee*
The Data Advisory Committee will assist DESE to identify, implement and assess cost-effective ways to achieve three goals:
 - a) Streamline financial reporting, eliminate duplicate reporting requirements, and improve data quality
 - b) Strengthen DESE capacity to analyze and report staffing, scheduling and financial data in ways that support strategic resource allocation decisions at the district and school level
 - c) Strengthen district capacity to use data to make strategic resource allocation decisions
3. *Reports to the Board and Joint Education Committee*
The Data Advisory Committee will report its progress to the Board of Elementary and Secondary Education and to the Co-chairs of the Joint Committee on Education at least semi-annually, and will make such recommendations for new funding as are necessary for DESE to achieve the goals.
4. *Work of the DESE*
DESE actions to achieve these three goals may include:
 - Work with MTRS to obtain individual teacher salary information

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

5. *Implications for Future State Funding*

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

Early Education

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

– PART C –

OTHER

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

I. IN-DISTRICT SPECIAL EDUCATION

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

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

II. INFLATION FACTORS

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

– PART D –

CONCLUSION AND NEXT STEPS

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

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

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

Appendix A

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.

Appendix B

Summary of Commission Meetings & Materials

Meeting # 1: October 9, 2014

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

Meeting #2: March 10, 2015

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

Meeting #3: March 27, 2015

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

Meeting #4: April 14, 2015

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

Meeting #5: May 5, 2015

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

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

Meeting #6: June 9, 2015

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

Meeting #7: June 23, 2015

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

Meeting #8: September 28, 2015

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

Meeting #9: October 16, 2015

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

COMMUNITY USE OF FACILITIES

STATEMENT OF POLICY:

The Uxbridge School Committee will allow the use of its facilities as community centers for the integration of the Uxbridge community and for individual and family participation in wholesome, character building activities conducive to good citizenship. Use by organizations outside the Uxbridge community will be considered on an individual basis. Such use shall be scheduled so as not to interfere with the instructional and school related activities of the district. *All requests will be considered on an individual basis and balanced against any potential financial impact to the school district's annual budget that such usage may involve.*

School Affiliated Group Use

School grounds and buildings are maintained for school purposes. School programs have precedence over all others. Facilities may be used upon approval without charge by student organizations, parent-teacher organizations, Uxbridge teacher organizations and other organizations directly affiliated with the schools. Such use shall be approved by the Principal. The Principal, or his/her employee designee, is responsible for the supervision and security of the building and groups during affiliated group use of building or facility.

Non-School Affiliated Group Use

School grounds and buildings may be used by individuals and associations for activities of an educational, recreational, social, civic, philanthropic and like purposes as may be deemed for the interest of the community. The affiliation of any such association with a religious organization shall not disqualify such association from being allowed such a use for such a purpose.

APPROVAL PROCESS

1. Arrangements for the use of the school buildings or facilities must be completed at least five (5) days before such actual use. Applications are available at the school office.
2. All arrangements for the use of facilities must be personally made by an adult who is an authorized representative of the sponsoring agency and assumes total responsibility. Any approval may be immediately terminated by the school Principal, her/his designee or in her/his absence, the attending policy officials, if in their judgment, such termination is warranted by existing conditions. Additionally, all extended use approvals issued are subject to cancellations on specific dates. (Preference will be given to members of the Uxbridge community.)
3. Applications will be prioritized according to the Uxbridge School Committee use

guide. Priority will be given to traditional seasonal activities.

4. If school is cancelled for inclement weather or any other unforeseeable reason, all evening activities for the school facilities will also be cancelled.
5. *Where appropriate, all groups or organizations utilizing any fields or facilities under the control of the school district shall submit proof of insurance as part of the required application paperwork.*
6. Decisions regarding facility use are made by the School Business Manager and District Plant Manager in conjunction with the Principal.
7. The school department reserves the right to cancel the use of fields, gymnasiums, or other facilities when deemed appropriate.
8. Decisions regarding facility use are made by the Principal.

School Use Guide

The Uxbridge School Committee in attempting to make the school buildings available to the maximum number of persons/organizations in the community will consider applications for use in the following order whenever feasible and practical:

- A. Uxbridge school students (K-12)
- B. Uxbridge Support Group (UTA, Booster Club)
- C. Uxbridge Youth Groups
- D. Uxbridge Adult Recreation
- E. Civic Non-Profit Organizations
- F. Other Groups

The Uxbridge School Committee through its representatives will be the final determining agent regarding any scheduling conflicts.

SCHOOL USE RESTRICTIONS

- A. School Week Evening Hours activities during the school year (Monday-Saturday) will be restricted to 10:00 p.m.
- B. Sunday usage will only be approved for time extended after 10:00 p.m. with special approval by the Superintendent of Schools.

SOURCE: Uxbridge

COMMUNITY USE OF FACILITIES AT UHS

The use of all UHS facilities, indoors and outdoors, primarily serves the activity needs of the students of the Uxbridge School District. This policy is intended to provide direction for the occasional use of these facilities by the community or other outside groups. Activities directly related to the school program or the support of the school program should have first priority in the use of interior areas of the high school, all outside fields and tennis courts. Community use of areas on the UHS campus is welcomed and encouraged during those periods when not being utilized for District or maintenance activities. Fees will be required for use of all spaces. A chart of 'user' fees for facilities at all District schools can be found on the official School Department website.

The following spaces within UHS and outside shall be made available for use, under conditions outlined in the Procedure process: gymnasium, auditorium, cafeteria, library, classrooms, and dance studio; all athletic fields including the synthetic turf field and track and field area. The weight room is not open to the public.

Individuals, representing a group, must follow the Procedure process, found on the official School Department website, to reserve any space at UHS. It shall serve as a contract which shall be signed by all users.

Tennis courts and the exterior (two) lanes of the track, used for walking or jogging only, will be open to the public when not in use with District activities.

A fee to cover custodial and utility costs shall be assessed at the contracted rate as deemed necessary by the District Plant Manager.

Initiated 3/26/13

Fee Structure at UHS (300 Quaker Highway):

Cafeteria (max. 300)	\$85.00
Kitchen	\$75.00
Gymnasium	\$34.00 per hour
Auditorium (max. 400)	\$150.00
(Auditorium) Tech Support (includes AV)	\$25.00/hr. (min. 3 hrs.)
Spotlight	\$25.00
Library	\$25.00
Classroom	\$25.00
Fitness Center (Dance space ONLY)	\$25.00
All Athletic Fields and Tennis Courts	\$150.00/hr. per 3-hr. timeslot (includes maintenance staff)

*A fee to cover custodial and utility costs shall be assessed at \$35/hr. as deemed necessary by the District Buildings and Grounds Manager.

Additions made 3/26/13
Adopted: SC June 4, 2013

UXBRIDGE PUBLIC SCHOOLS
Building Maintenance & Grounds
 Mike Belanger, Plant Manager
 (508) 278-8648 ext. 108

Policy KF

Date of Application: _____
 Name of Applicant: _____ Phone: _____

Address of Applicant: _____
 (street) (town) (state) (zip code)

Name of Organization/Club _____

Renting: Describe the event in detail _____

*** SMOKE MACHINES AND/OR FOG MACHINES ARE PROHIBITED ***

Please place a check mark next to the school and area you wish to rent.

School	Area Requested	Rate	
Taft Early <input type="checkbox"/>	Cafeteria (max 300) <input type="checkbox"/>	\$85.00	
Learning Center	Kitchen <input type="checkbox"/>	\$75.00	
16 Granite St.	Gym (max 214) <input type="checkbox"/>	\$34.00	Per Hour
	Classroom <input type="checkbox"/>	\$25.00	
	Spotlight <input type="checkbox"/>	\$25.00	
	Library <input type="checkbox"/>	\$25.00	Total Due: \$ _____
Whitin Elementary <input type="checkbox"/>	Cafeteria (max 300) <input type="checkbox"/>	\$85.00	
120 Granite St.	Kitchen <input type="checkbox"/>	\$75.00	
	Gym (max 386) <input type="checkbox"/>	\$34.00	Per Hour
	Classroom <input type="checkbox"/>	\$25.00	
	Spotlight <input type="checkbox"/>	\$25.00	
	Library <input type="checkbox"/>	\$25.00	Total Due: \$ _____
McCloskey <input type="checkbox"/>	Cafeteria (max 300) <input type="checkbox"/>	\$85.00	
Middle School	Gym (max 575) <input type="checkbox"/>	\$34.00	Per Hour
62 Capron St.	Auditorium (max 600) <input type="checkbox"/>	\$150.00	
	Classroom <input type="checkbox"/>	\$25.00	
	Kitchen <input type="checkbox"/>	\$75.00	
	Spotlight <input type="checkbox"/>	\$25.00	
	Library <input type="checkbox"/>	\$25.00	Total Due: \$ _____

Custodial and Cafeteria Worker Rates: \$35.00 per hour. Custodial costs will be assessed when a custodian is not on duty.

Cafeteria help is needed when: Dishes, stoves and dishwashers are going to be used.

Please make checks payable to: Uxbridge Public Schools

Mail to Mike Belanger, Uxbridge Public Schools 21 South Main St., Uxbridge, MA 01569

Date of Rental: _____ Purpose: _____

Time Range (i.e., 8:00 a.m. to 11:00 a.m.): _____

Special Equipment Requested: _____

Approved By: _____ Date: _____
 Principal

Approved By: _____ Date: _____
 Director, Plant Operations

Revised 9/9/2014

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UXBRIDGE PUBLIC SCHOOLS
Building Maintenance & Grounds
 Mike Belanger, Plant Manager
 (508) 278-8648 ext. 108

Policy KF

Date of Application: _____
 Name of Applicant: _____ Phone: _____

Address of Applicant: _____
 (street) (town) (state) (zip code)

Name of Organization/Club Renting: _____
 Describe the event in detail _____

*** SMOKE MACHINES AND/OR FOG MACHINES ARE PROHIBITED ***
 Please place a check mark next to the school and area you wish to rent.

School	Area Requested	Rate	
High School <input type="checkbox"/>	Cafeteria (max 300) <input type="checkbox"/>	\$85.00	
300 Quaker Hwy	Kitchen <input type="checkbox"/>	\$75.00	
	Gym <input type="checkbox"/>	\$34.00	Per Hour
	Classroom <input type="checkbox"/>	\$25.00	
	Spotlight <input type="checkbox"/>	\$25.00	
	Library <input type="checkbox"/>	\$25.00	
	Auditorium (max 400) <input type="checkbox"/>	\$150.00	
	(Aud.)Tech Support (incl. AV) <input type="checkbox"/>	\$25.00	Hr. (min. 3 hrs)
	All Athletic Fields & Tennis <input type="checkbox"/>	\$150.00	Hr. per 3-hr timeslot
	Courts (includes Maint. Staff)		
	Fitness Center <input type="checkbox"/>	\$25.00	Dance space ONLY
			Total Due: \$ _____

Custodial and Cafeteria Worker Rates: \$35.00 per hour. Custodial costs will be assessed when a custodian is not on duty.

Cafeteria help is needed when: Dishes, stoves and dishwashers are going to be used.

Please make checks payable to: Uxbridge Public Schools
Mail to Mike Belanger, Uxbridge Public Schools 21 South Main St., Uxbridge, MA 01569

Date of Rental: _____ Purpose: _____
 Time Range (i.e., 8:00 a.m. to 11:00 a.m.): _____
 Special Equipment Requested: _____

Approved By: _____ Date: _____
 Principal
 Approved By: _____ Date: _____
 Director, Plant Operations

Revised 9/9/2014

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Policy KF Fee Schedule – General

1. Custodian – As per rate established by the *contract*.
2. Police – As per rate established between the local Police Association and the Board of Selectmen.
3. Security Guards – As per rate established by the service provider.
4. Rental Fees – As per attached sheet, will be charged to all groups except as follows:

4.1 Groups supported by public funds or school support groups will be charged only those incidental costs the district may incur in making facilities or equipment available.

5. Rental and Custodial Fees – These fees will be deposited in the District’s “Facilities Use” revolving account.
6. All fees will be paid in advance.
7. Additional fees may be incurred for any equipment lost and/or damaged, and/or any special custodial requirements for clean up after facility rental.
8. *For any event where it is deemed on-site administrative personnel is required the group will be assessed an hourly fee.*

Notes:

1. **All rentals, unless otherwise noted, are based on an eight (8) hour minimum. Facility/equipment rentals will be prorated.**
2. **Heat is provided at standard building settings as established for the Uxbridge Public Schools.**
3. **No rented equipment may be taken outside of the Town of Uxbridge.**
4. **Flat rates for extended building use may be established by the School Business Manager with School Committee approval.**

I/We affirm that I/we have read and reviewed Policy KF, and that I/we understand the contents of this policy. I/We understand that my organization’s participation in this event is voluntary and that participants are free to choose not to participate in said event. By signing this application, I/we affirm that I/we have agreed to all terms of Policy #851 and have decided to allow my organization to use the Uxbridge Public School’s facilities with full knowledge that the Uxbridge Public Schools’ will not be liable to anyone for personal injuries and property damage my participants may suffer during use of Uxbridge Public School’s facilities.

Date: _____

Signed: _____

Applicant _____

_____ on behalf of Organization



**APPLICATION
REQUEST FOR BUILDING ACCESS**
Please complete the information below for each building request.

Person requesting access: _____
Title/Organization: _____
Mailing Address: _____
Telephone Number: _____

Please complete the information below:

1. Which building are you requesting to be open?

- Taft Early Learning Center McCloskey Middle
- Whitin Elementary High School

2. Date to Open: _____
Date to Close: _____

3. Day(s) of the week: (circle all that apply)
Sunday Monday Tuesday Wednesday Thursday Friday Saturday

4. Which door(s) do you need open? (circle all that apply)
Front Door Back Door Other – please explain

5. Time Frame ----- Please complete for each day – enter an open time and a closing time.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

Is this Temporary or Permanent Access? _____

Please explain why you need to have access to this building.

ased 9/9/2014

CONTINUED

Requested By:

Applicant Name

Date:

I have authorized access to this building for the particular dates and times requested, based on the information given by the applicant. I have also taken into consideration the school's security alarm system and will be responsible in making sure the building remains secure.

Principal

Date

Only: _____ Office

Badge Required: _____ Number of Badge: _____ Date Issued: _____

Information Entered by: _____
Date Entered for Opening: _____ Date Entered for Closing: _____

8

Existing Policy

File: JF

SCHOOL ADMISSIONS

All children of school age who reside in the town will be entitled to attend the public schools, as will certain children who do not reside in the town but who are admitted under School Committee policies relating to nonresident students or by specific action of the School Committee.

Advance registration for prospective kindergarten students will take place in January. Every student seeking admission to school for the first time must present a birth certificate or equivalent proof of age acceptable to the Principal and proof of vaccination and immunizations as required by the state and the School Committee. Proof of residency of legal guardianship may also be required by the school administration.

LEGAL REFS.: M.G.L. 15:1G; 76:1; 76:5; 76:15; 76:15A
603 CMR 26:01; 26:02; 26:03

CROSS REFS.: JLCA, Physical Examination of Students
JLCB, Inoculations of Students
JFBB, School Choice

Superintendent's Recommendation

File: JF

ADMISSION AND RESIDENCY POLICY

The Uxbridge School Committee has adopted the following policy regarding the residency and enrollment of students. This policy has been adopted to ensure that only families who actually reside in the Town of Uxbridge have full access to educational opportunities. Furthermore, the Uxbridge School District requires stringent proof of residency in order to maintain compliance with this policy.

Pursuant to M.G.L. c. 76 §5, all children of school age who actually reside in the Town of Uxbridge are entitled to attend the Uxbridge Public Schools. In addition, children who do not actually reside in the Town of Uxbridge may enroll in the Uxbridge Public Schools, if the School Committee adopts School Choice or another school district tuitions the student into the Uxbridge Public Schools through an agreement between the Superintendent of the Uxbridge Public Schools and the superintendent of the other city or town.

When a student enrolls in the Uxbridge Public Schools, the parent/guardian or the student him/herself must provide documentation, acceptable to the administration, which establishes the residency of the student. The Uxbridge Public Schools may conduct an investigation into the residency of any student, either upon enrollment or thereafter, if any question about the student's residency arises.

In order to attend Uxbridge Public Schools, a student must actually reside in the Town of Uxbridge, unless one of the exceptions below applies. The residence of a minor child is ordinarily presumed to be the legal residence of the child's parent or legal guardian having physical custody of the child. A student's actual residence is considered to be the place where he or she lives permanently. In determining residency, Uxbridge Public Schools retains the right to require verifiable documentation and to investigate where a student actually resides. (Legal Reference: M.G.L. Chapter 76, Section 5). Moreover, staff has been advised to maintain compliance with regard to the district's residency policy, which includes the completion of all required forms. No substitutes will be permitted and registration will not be allowed without the required documents.

The principal at each school will verify the telephone number and home address of all students at least annually. Verification of residency, including updated documentation, will be required when students enter the Uxbridge School District, move from grade 2 to grade 3, move from grade 5 to grade 6, move from grade 8 to grade 9, or move to or re-enter Uxbridge Public Schools from an out-of-district program or vocational/agricultural high school. If there is any change in residency status, the parent(s)/guardian(s) will be required to notify the building principal in the school where their child is enrolled within five (5) business days of the change of address. Uxbridge Public Schools reserves the right to request additional documents and/or to conduct an investigation; therefore, the district may enlist the services of a Residency Officer/Investigator to verify a family's residency. If, in fact, a determination is made that the student does not actually reside in the Town of Uxbridge, the student's enrollment will be terminated immediately (Legal Reference: M.G.L. Chapter 76, Section 5). Immediate termination of enrollment will also apply for students currently enrolled who do not reside in the Town of Uxbridge. A parent, legal guardian, or student who has reached the age of majority (18), may appeal this determination of ineligibility for enrollment to the Superintendent of Schools, whose decision shall be final.

The district reserves the right to request documentation at times other than those specified.

Pursuant to M.G.L. c. 71 §37L, the parent/guardian or the student him/herself are required to bring a copy of the student's complete school record from previous school districts. The student cannot be enrolled until the complete school record is received. The administration will assist the parent/guardian or the student in obtaining a complete school record.

Exceptions

The Residency Requirements shall be waived under the following conditions:

- Students who fall under the McKinney-Vento Homeless Assistance Act. If a family qualifies under this act, a letter validating residency in non-permanent housing may be required as confirmation that the family is living in non-permanent housing.
- Students who are currently and legitimately enrolled in Uxbridge Public Schools who move out on or after February 1st of a given school year, or
- Students who are currently and legitimately enrolled in Uxbridge Public Schools in grade 8 or high school seniors who move out after the end of the first quarter of a given school year. These students may complete the current school year provided they have made the Superintendent of Schools aware of the move in writing within five (5) business days of such move.
- Students whose parents divorce or separate and share physical custody, provided one custodial parent remains a resident of the Town of Uxbridge and the student resides at least 50% of the time with the parent who resides in the Town of Uxbridge. (*Legal documentation must be provided to school office- Custodial Court Documentation)

Verification of Residency

Before any student is enrolled in Uxbridge Public Schools, a number of documents **must be provided**:

- If the family is currently living with a family member or a friend, a Landlord Affidavit must be completed.
- No child will be denied access to Uxbridge Public Schools because of immigration status.
- All documents used to verify residency will become part of the student's record whereby confidentiality will be protected under The Family Educational Rights to Privacy Act (FERPA).

Potential Waiver When Residency is in Transition

For students whose residency is in transition, the following exceptions to the general policy may apply, with prior written approval from the Superintendent of Schools:

Pending Purchase of Dwelling: The children of families who have signed and accepted Purchase and Sale Agreement to purchase and reside in a dwelling in the Town of Uxbridge may be enrolled up to 30 calendar days in advance of the time actual physical residence occurs. If actual residence occurs later than 30 days after enrollment, students may be asked to leave the Uxbridge Public Schools until actual residence occurs.

Construction of New Dwelling: Children of families who are building a primary residence in the Town of Uxbridge may enroll in the Schools at the beginning of the school year if they have obtained a certificate of occupancy from the Town.

Notification

The residency policy of Uxbridge Public Schools will be published in the district's School Committee Policy Manual, school handbooks, and on the district website. At the time of enrollment, parent(s)/guardian(s) will endorse in writing that they have read and agree to the district policy. If there is any suspicion of residency violations, concerns may be reported by calling the superintendent's office.

A determination of any violation of the residency policy via falsification or misrepresentation of information may result in immediate termination of enrollment as well as the enforcement of certain penalties (e.g., reimbursement for educational costs for the time the student did not actually reside in the Town of Uxbridge).

PROMOTION/GRADUATION REQUIREMENTS-UHS

1. Students must pass the following courses with a grade of sixty (60) or better and the minimum cumulative credits indicated in order to graduate from Uxbridge High School.

AREA	CREDITS	SEQUENCE REQUIREMENTS
English	8 credits	Students must take four years of English as applicable to each grade level.
Mathematics	8 credits	Students must take four years of Mathematics as applicable to each grade level.
Science/Technology	6 credits	All students must pass Biology.
Social Studies	6 credits	All students must pass at least one (1) course in US History.
Foreign Language	2 credits	Students must complete a minimum of 2 credits in Foreign Language.
Physical Education	4 courses	Students are required to take one PE course per year, with exception approved.
Health	1 course	All students must take one (1) Health Course.
Fine, Applied, or Performing Art	1 course	All students must take one (1) Fine Arts elective.

Massachusetts Law requires that all students awarded a diploma must have earned a competency determination and fulfilled local graduation requirements. Competency determination is achieved by receiving a passing score on MCAS exams identified as requirements to receive a diploma. Students who meet local graduation requirements but do not earn a competency determination will receive a "Certificate of Attainment" instead of a diploma. Students who do not achieve a minimum score of 240 on MCAS, will be obliged to complete an Education Proficiency Plan, per state regulation.

2. Credits

- 2.1 "Structured learning time" shall mean time during which students are engaged in regularly scheduled instruction, learning activities, or learning assessments within the curriculum for study of the core subjects. In addition to classroom time where both teachers and students are present, structured learning time may include directed study,

independent study, technology-assisted learning, presentations by persons other than teachers, school to work programs, and statewide student performance assessments.

Students who do not earn the minimum credits will receive written notice and revised "Four Year Plan" outlining courses needed in order to graduate by Senior year. This communication will accompany their report card sent from the Guidance Department. Due to the change from a semester schedule to a trimester schedule, the number of credits needed to be promoted to the next grade level will vary over the next three years as follows:

	Grade 10 promotion	Grade 11 promotion	Grade 12 promotion	Graduation
Class of 2017	7.5/10 credits (75%)	18/22 credits= (81%)	28/34 credits (82%)	42/48 credits (87%)
Class of 2018	9/12 credits= (75%)	19/24 credits= (79%)	31/38credits (83%)	45/52 credits (86.5%)
Class of 2019	9/12 (75%)	21/26 (80.8%)	34/40 (85%)	48/54 (88.8%)
Class of 2020+	12/14 (85.7%)	24/28 (85.7%)	36/42 (85.7%)	50/56 (89.3%)

- 2.3 Courses for graduation may be taken at a college/university. Credit will be awarded on the basis of equivalent content as determined by the Principal.
- 2.4 Students will receive credit for the same subject only once, except with approval through IEP process or by the Principal.
- 3. Parents of seniors in danger of not graduating due to loss of credit will be notified by registered mail, return receipt requested, at the end of the first trimester. Such notice shall include a request that the parent call for an appointment with the guidance counselor. At this meeting the student's record and procedures for acquiring lost/lacking credits will be reviewed.
- 4. In accordance with IDEA 2004, any student for whom the Uxbridge Public School System is responsible will be allowed to participate in graduation and/or receive an Uxbridge High diploma upon completion of the requirements in Section 1 and 2 (listed above) or the requirements specified in the Individual Education Plan.
- 5. Students who fail a subject needed for graduation from Uxbridge High School must make up that course. Make ups may be completed as follows:

- 5.1 Studying the failed subject during the summer immediately following the year in which the course was failed. The grade earned at an approved summer school will be averaged with the numerical grade of the failed class
 - 5.2 Studying a previously failed required course at a state or private college or university at which a three (3) credit course would equal a high school course that is taken over two trimesters or a total of four (4) credits.
 - 5.3 Physical Education/Health make up credits are awarded on a Pass/Fail basis, if the course is not retaken at Uxbridge High School.
 - 5.4 Taking the course over at Uxbridge High School prior to graduation.
 - 5.5 Foreign Language
Students failing a Foreign Language course must either successfully repeat the failed course or attend an approved summer school. Upon completion of an approved summer school course the student must pass a departmental exam to continue to the next level of foreign language study.
 - 5.6 Independent study of a course at Uxbridge High School not previously taken. The course must contain a minimum of 33 hours of structured learning time as outlined in the student's Independent Study Contract, for each credit.
6. The Graduation Review Committee (GRC) will consist of the Principal, Assistant Principal, School Nurse, Teacher, and the Student's Counselor. The members will serve a one year term. The committee will review, upon request, the **local graduation requirements**. A student will have the opportunity to substantiate that he/she has made every effort to meet these **local** graduation requirements, including efforts to make up courses and earn back lost credit due to absence. Due to his/her unique circumstances, the GRC may develop an alternative program for this student, including waivers of required courses to allow the student to obtain a high school diploma or Certificate of Attainment. The Superintendent will be informed when a **waiver is granted**.
 7. Credit for a failed subject is contingent upon following the make-up procedures correctly. The Principal has the authority to approve make-up credits in accordance with this policy.
 8. Further Requirements:
 1. Physical Education may be omitted with a valid medical excuse from a physician.

First Reading: August 3, 2010
Second Reading: September 7, 2010
Approved: September 7, 2010
Revised:

STUDENT FUND-RAISING ACTIVITIES

In general, the Committee disapproves of fund-raising in the community by students for school activities. Especially discouraged is the sale of goods produced by companies for profit, such as magazines, candy, and similar items.

Exceptions to this policy will be:

1. Sale of tickets to scheduled athletic events and school dramatic and musical performances.
2. Sale of advertising space in school publications.
3. A fund-raising activity approved by the Superintendent.
4. Proposals to raise funds for charitable purposes or for benefit of the school or community (for example: American Field Service activities, United Nations, or scholarship funds) provided such proposals have been individually approved by the building Principal and Superintendent.

No money collections of any kind may be held in the schools without the specific consent of the Superintendent.

CROSS REFS.: JP, Student Gifts and Solicitations
 KHA, Public Solicitations in the Schools

STUDENT ACTIVITY ACCOUNTS

Student funds may be raised to finance the activities of authorized student organizations. Student activity funds are considered a part of the total fiscal operation of the District and are subject to policies established by the School Committee and the Office of the Superintendent. The funds shall be managed in accordance with sound business practices, which include accepted budgetary and accounting practices.

In compliance with Massachusetts General Law Chapter 71, Section 47, the School Committee:

1. Authorizes the Principals to accept money for recognized student activity organizations, which currently exist, or as from time to time may be revised.
2. Authorizes the Town Treasurer to establish and maintain a Student Activity Agency Account(s) which is to be audited as part of the Town's annual audit. The interest that is earned on such accounts shall be maintained in the Agency Account and distributed annually among the Student Activity Checking Accounts as directed by the regulations established by School Committee policy.
3. Authorizes Student Activity Checking Accounts for use by the Principals with specific maximum balances established for each school by School Committee policy.
4. Directs Principals to provide the Treasurer with a bond in an amount agreeable to the Treasurer.

For accounts with limits that exceed \$25,000.00, the Massachusetts Department of Education recommends that districts consider an audit conducted by an outside accounting firm every two to three years.

STUDENT ACTIVITY ACCOUNTS

Student funds may be raised to finance the activities of authorized student organizations. Student activity funds are considered a part of the total fiscal operation of the District and are subject to policies established by the School Committee and the Office of the Superintendent. The funds shall be only for the benefit of students and managed in accordance with sound business practices, which include accepted budgetary, accounting, and internal control practices. The Superintendent shall ensure that, annually, all Principals and student organizations receive a copy of this policy as well as a copy of established procedures for control of receipts and expenditures that meet or exceed DESE guidelines.

In compliance with Massachusetts General Law Chapter 71, Section 47, the School Committee:

1. Authorizes the Principals to accept money for recognized student activity organizations, which currently exist, or as from time to time may be revised. All funds received for student activities must be deposited into the Student Activity Agency Account and no funds shall be directly deposited to a Student Activity Checking Account except from the Student Activity Agency Account.
2. Authorizes the Town or District Treasurer to establish and maintain a Student Activity Agency Account(s) which is to be audited as part of the Town's annual audit. The interest that is earned on such accounts shall be maintained in the Agency Account and distributed annually among the Student Activity Checking Accounts as directed by the procedures established by the Superintendent.
3. Authorizes Student Activity Checking Accounts for use by the Principals with specific maximum balances established annually for each school by vote of the School Committee. Payments for expenditures shall be made, whenever possible, by check, debit, or EFT directly from the Student Activity Checking Account. Reimbursements to personal credit card holders shall require the prior authorization of the Superintendent. Signatory authorization for Student Activity Checking Accounts shall be restricted to the Principal and (Superintendent or Treasurer). Student Activity Checking Accounts shall be audited annually in accordance with DESE guidelines.
4. Directs Principals to provide the Treasurer with a bond in an amount agreeable to the Treasurer.
5. Shall annually, prior to the start of each school year, vote to establish or change the maximum balance that may be on deposit in each Student Activity Checking Account.

For accounts with maximum balance limits that exceed \$25,000.00, the School Committee shall consider, in accordance with DESE guidelines, that an audit be conducted by an outside audit firm every three years

Graduating Class Funds

Funds held on behalf of graduating classes are to be held within the Student Activity Checking Account for the High School. Such funds shall be designated by the class' Year of Graduation, such as Class of 1998, etc.

Once a class has graduated from High School, their funds should be removed from the High School Student Activity Checking Account no later than two years from the date of graduation. It is the responsibility of the class officers to arrange for these funds to be removed from the High School Activity Checking Account. When requested, and once all outstanding financial obligations of the graduating class have been met, the remaining balance should be removed from the fund by check transfer payable to the Class of XXXX. Checks payable to individual members of the graduating class are not permitted.

Should the class officers not request to have their funds removed from the Student Activity Checking Account within two years of their graduating, the funds will be forfeited by the class and transferred into the General Sub-fund portion of the Student Activity Agency Account. These funds will then be allocated by a vote of the School Committee.

Class officers should be given a copy of this policy during the course of their senior year to ensure their knowledge of their obligations to perform under this policy.

LEGAL REF.: M.G.L. 71:47

SOURCE: MASC

NOTE: DESE audit guidelines for Student Activity Checking Accounts require an annual audit. In regional districts these accounts may be a part of the annual audit by a third party auditor. In municipal districts the audits may be conducted by a district or municipal employee but not by the Principal, Treasurer, Superintendent, or any authorized signatory on the accounts. Districts with large numbers of schools may rotate the schools through the audit process.