

Berlin-Boylston Public Schools Regionalization Feasibility Study



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Executive Summary

Overview

In March 2014, the Central Massachusetts Regional Planning Commission (CMRPC), together with the Berlin Memorial, Boylston Elementary and Berlin-Boylston Regional School Committees, undertook a feasibility study to determine the financial, administrative and academic implications of forming a PreK-12 regional school district. Increasingly, Massachusetts school districts are pursuing regional consolidation (regionalization), a change encouraged by the State and rendered necessary by state and federal budget cuts and an increase in unfunded local liabilities. Through this model, numerous Districts have reduced overhead and channeled savings into programs to improve educational outcomes. The Towns of Berlin and Boylston have made some progress on this front. The Berlin Boylston Regional School District (BBRSD) was formed in November of 1959, and regional classes in grades 7 to 12 began in 1962 after the completion of Tahanto Regional Middle/High School. Effective July 1, 2013, the regional school district was modified to include grades 6 to 8 at the middle school level and 9 to 12 in the high school program. Currently the Towns of Berlin and Boylston maintain separate elementary schools, the Berlin Memorial School and the Boylston Elementary School, and a Central District Administrative Office is located in the Town of Boylston. With three (3) separate schools committees, curriculums and calendars, Tahanto, the Central Office, Berlin and Boylston are subject to redundancies. Duplicate administrative tasks for central office staff such as filing three school committee reports, three payroll and vendor warrants, grant requests, audits, and Student Information Management System (SIMS) filing to Federal, State or any other Governmental entity are usurping funds and administrative time that could be used to enhance professional development, student evaluation, and improve educational outcomes.

CMRPC, formed in 1963, is the designated regional planning entity for Central Massachusetts, serves the City of Worcester and 39 surrounding communities. CMRPC collaborates with local, regional, state and federal officials to bring a regional perspective and a coordinated approach to the planning and development that occurs in this region. The goal of CMRPC is to improve the quality of life for those who live and work in the Central Massachusetts region.

Funding for this feasibility study was provided by the State of Massachusetts' District Local Technical Assistance (DLTA) program for CY14.

Methodology

The study was conducted through the following methods:

- Literature review
- Student performance evaluation
- DESE consultation
- Financial analysis

The study examines demographic, statistical, and qualitative data applicable to Berlin and Boylston's school districts, including:

- Population levels
- Employment rates
- Median worker and household incomes
- Student enrollments
- MCAS scores
- District Analysis and Review Tool (DART) data from the Department of Elementary and Secondary Education (DESE)
- Ch. 70 Public Education Aid
- Ch. 71 Regional Transportation Aid
- Employee salary and benefit changes
- Responses to regionalization (i.e., perceived gains and fears) and
- Circumstantial constraints

All data used was the best available to CMRPC.

Financial Summary

Savings

Projected Additional Regional School District Transportation Aid:	\$139,143
Projected Regionalized Net Health Insurance Savings:	\$ 55,000
Projected Chapter 71 Regional Bonus Aid (1 st year of 5 year program):	<u>\$ 23,550</u>
Projected Regionalization Savings:	\$217,693

Cost

Projected Boylston Elementary Salary Schedule Increase:	\$ 92,626
Projected Tahanto Regional Middle/High Salary Schedule Increase:	<u>\$ 66,678</u>
Projected Regionalization Costs:	\$159,304

Total

Total Projected Savings from Regionalization:	<u><u>\$ 58,389</u></u>
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Recommendation

Based on the research and analysis put forth in this feasibility study, CMRPC recommends the Berlin and Boylston schools regionalize. Massachusetts' student enrollment is projected to decline through 2019, decreasing the demand for separate school facilities. Moving from a three-district system to a single PreK-12 district system will reduce unnecessary overhead and improve student scores. The anticipated academic benefits include the ability to support as well as increase the level of student achievement by improving student performances through a more refined and coordinated curriculum. The regionalization of the three schools and the central district office will also yield financial benefits by

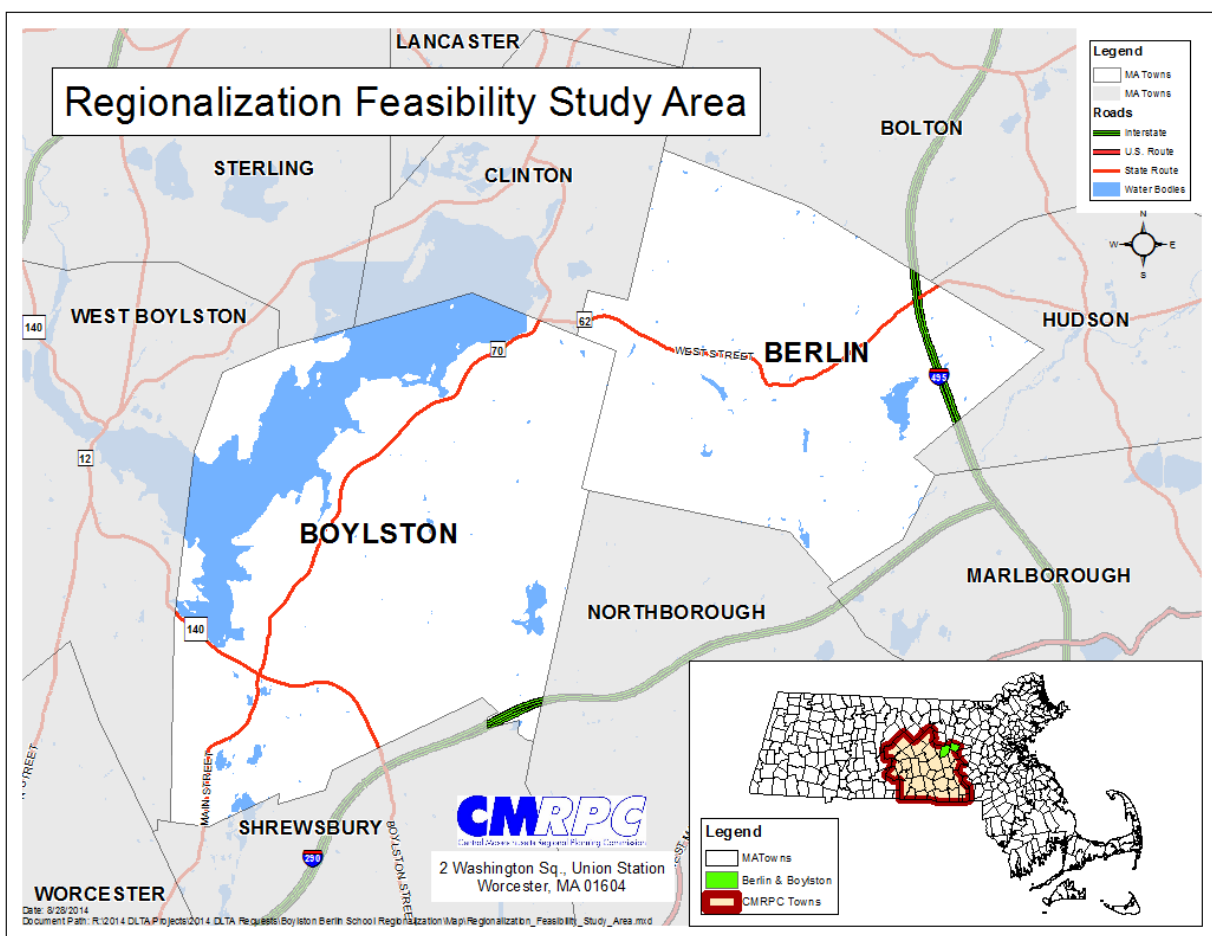
increasing revenue with regional transportation and bonus aid incentives and the reducing costs associated with health insurance.

Study Area

Geographic and Population Data

Situated in northeastern Worcester County, Berlin and Boylston are twenty-five (25) minutes from the City of Worcester and fifty (50) minutes from the City of Boston. Berlin borders Boylston to the Northeast; additional surrounding towns include Sterling, Clinton and Bolton to the north, Hudson and Marlborough to the east, Northborough and Shrewsbury to the South, and West Boylston to the west. *Figure 1: Berlin and Boylston Locus* (below) depicts these towns' spatial relationship.

Figure 1: Berlin and Boylston Locus



(Source: CMRPC)

Berlin and Boylston are each less than 20 square miles in size; 13.18 square miles and 19.70 square miles, respectively. Combined, they occupy 32.8 square miles. Berlin has a population of 2,902 (Berlin At A Glance Report, DLS), whereas Boylston is home to 4,393 people (Boylston At A Glance Report, DLS).

Combined, they contain 7,295 people for a density of 222 persons per square mile. Given these figures, Berlin and Boylston can be classified as rural towns or emergent developing suburbs. Each town is largely comprised of open space, which constitutes sixty-nine (69) percent of Boylston and seventy-three (73) percent of Berlin. Their remaining land areas (combined and averaged) are classified as follows: ten (10) percent residential, ten (10) percent water, seven (7) percent agricultural, and three (3) percent non-residential built environment. Their topography is consistent with this classification and reflects a common heritage of agriculture and light industry; however, Boylston is home to the Wachusett Reservoir and the Nashua River, whose tributaries crisscross the Town. By contrast, Berlin is marked by farmland and pastoral views with no water or sewer availability. Consequently, the average commute time for Berlin and Boylston residents is approximately twenty-four (24) minutes; however, the median household income in Boylston is \$95,438 (143 percent of the state average); in Berlin, it is \$94,676 (142 percent of the state average). With relative affluence but a small tax base and limited state and federal aid, the Towns suffer from fiscal constraints that impact the quality of education.

Table 1: Berlin and Boylston's Historic Population Change depicts the Towns' individual and combined populations (and their rates of change) from 1960-2010. Berlin and Boylston's populations have grown between 1960 and 2010. Berlin's greatest population increases occurred from 1960-1970 and 2000-2010. Boylston's greatest population increases occurred during 1960-1970 and 1970-1980. Collectively, the towns experienced their highest rate of population growth from 1960-1970.

Table 1: Berlin and Boylston's Historic Population Change

Year	Berlin Pop.	% Change	Boylston Pop.	% Change	Combined Pop.	% Change
2010	2,866	+20.4%	4,355	+8.7%	7,221	+13%
2000	2,380	+3.8%	4,008	+14%	6,388	+9.9%
1990	2,293	+3.5%	3,517	+1.4%	5,810	+2.2%
1980	2,215	+5.5%	3,470	+25.1%	5,685	+16.7%
1970	2,099	+20.5%	2,774	+17.2%	4,873	+18.6%
1960	1,742		2,367		4,109	

(Source: U.S. Census)

Tables 2 and 3 (below) depict population and employment projections for Berlin and Boylston in coming years. Both towns' populations and employment levels are expected to grow between 2010-2020 and between 2020-2035. Berlin's population and employment levels will grow much more than Boylston's between 2010-2020, however, both towns' rates are expected to mirror one another by 2035. With regard to methodology: 2000-2009 data, tabulated by the Massachusetts Executive Office of Labor and Workforce Development, served as baseline measurements. CMRPC staff distributed the population and employment control totals for the region (obtained from MassDOT) to town level based upon past growth trends, land use and infrastructure capacity, planned future projects, and stakeholder input, including that of the Central MA Metropolitan Planning Organization (CMMPO) and CMMPO Advisory Committee. CMRPC Transportation staff collaborated with community development and land use personnel throughout the process, ensuring the incorporation of cross-disciplinary input and feedback. As a result of this process, CMRPC projects continued growth for both Towns throughout 2035. The Riverbridge mixed-use development in Berlin projects a total new population of just over 350 people; approximately 52 in the 31 condominiums, 180 in the 84 rental units and 120 in the CCRC/Assisted

Living Facility . (www.Riverbridgenorth.com/project). The Town of Berlin estimates 30 additional students to reside in this development. Such changes necessarily impact school districts and their budgets; Berlin and Boylston will need to plan for additional students, teachers, and associated costs.

Table 2: Berlin and Boylston's Projected Population Change

<u>Year</u>	<u>Berlin Pop.</u>	<u>% Change</u>	<u>Boylston Pop.</u>	<u>% Change</u>	<u>Combined Pop.</u>	<u>% Change</u>
2035	3,480	+10.8%	5,040	+9.8%	8,520	+10.2%
2020	3,140	+9.6%	4,590	+5.4%	7,730	+7%
2010	2,866		4,355		7,221	

(Source: CMRPC/MassDOT)

Employment

As previously stated, projections indicated consistent employment for both towns in upcoming decades. In 2010, 480 people worked within the Town of Berlin; projections indicate that Berlin will employ 600 people by 2035. The employment level in Berlin may reach or exceed 600 much sooner, based on Cabela's estimated 200 employees, anticipated to open in Spring 2015, in addition to the estimated 440 jobs to be created at the Riverbridge mixed-use development site. Similarly: in 2010, Boylston had 1,800 people working within the Town. Projections indicate that that the town will employ 1,960 by 2020 and 2,060 people by 2035. As shown in *Table 3: Berlin and Boylston's Employment Levels*, the towns' collective employment will increase the most from 2020-2035.

Table 3: Berlin and Boylston's Employment Levels

<u>Year</u>	<u>Berlin Employment</u>	<u>% Change</u>	<u>Boylston Employment</u>	<u>% Change</u>	<u>Combined Employment</u>	<u>% Change</u>
2035	630	+5%	2,060	+5.1%	2,690	+5.08%
2020	600	+25%	1,960	+8.89%	2,560	+12.28%
2010	480		1,800		2,280	

(Source: CMRPC/MassDOT)

Income

To evaluate income, the CMRPC used American Community Survey (ACS) data. According to 2008-2012 estimates, annual median nonfamily incomes between Berlin and Boylston are vastly different (35% difference), while their annual median household incomes are practically the same (0.8% difference). Incomes were reportedly higher in Berlin for both of these values; however, for median earnings for workers, Boylston was estimated as being 19% higher.

Table 4: Annual Worker and Household Income Levels for Berlin and Boylston

	<u>Berlin</u>	<u>Boylston</u>	<u>Difference</u>
Median Nonfamily Income	\$72,019	\$50,508	35%
Median Household Income	\$95,438	\$94,676	0.8%
Median Earnings for Workers	\$41,006	\$49,665	19%

(Source: ACS 2008-2012 Estimates)

Race and Ethnicity

Both Berlin and Boylston contain predominately white populations. According to the 2000 Census, minority groups accounted for only 2.4% of Berlin's population and 3.3% of Boylston's population. In 2010, minority demographics rose to 4.6% in Berlin and 6.8% in Boylston. In 2000, the second most common racial demographic in both Berlin and Boylston was Asian. The third most common race in Berlin was Hispanic or Latino (of any race), and Black or African American in Boylston. In 2010, Berlin's second most common racial demographic was Hispanic or Latino (of any race), while Boylston's remained Asian. Between 2000 and 2010, the biggest change in demographics these Towns saw was in their Asian populations. In 2000, there were only 78 Asian people living in Berlin and Boylston while in 2010 there were 199 (255% increase). The second largest change in demographics for Berlin and Boylston between 2000 and 2010 was in Hispanic or Latino (of any race) persons; in 2000 there were only 35, whereas in 2010 the population increased to 108 (308.5% increase). Demographic data is important to consider in a school regionalization feasibility study because an increase in English language learner (ELL) students requires specialized programs and teachers.

Table 5: Percent Minority Populations in Berlin and Boylston

Year	Berlin	Boylston
2000	2.4%	3.3%
2010	4.6%	6.8%

(Source: U.S. Census)

The ACS predicts the amount of ELL students with their "language spoken at home" category. This analysis estimates that 3.7% of Berlin's population and 9.6% of Boylston's population speaks a language other than English at home. Out of these populations, 0.9% in Berlin and 2.1% in Boylston speak English less than "very well."

Table 6: Populations Speaking Languages other than English Spoken at Home

	Speaks Language Other than English at Home	Speaks English Less than "Very Well"
Berlin	3.7%	0.9%
Boylston	9.6%	2.1%

(Source: ACS 2008-2012 Estimates)

Since the 2008-2012 estimates of the percent of populations that speak a language other than English at home is higher than the 2010 Census compositions of minority populations in these towns, we can infer that minority populations are continuing to rise. This has the implication that ELL programs and spending will continue to rise for Berlin and Boylston.

Housing

Since the year 2000, both Towns have seen an increase in the number of their housing units, although Berlin has seen much more development than Boylston. In 2000, Berlin had 893 housing units and Boylston had 1,606. In 2010, Berlin had 1,189 housing units (+33.1%) and Boylston had 1,778 (+10.7%).

According to the Department of Housing and Community Development, in 2013, Berlin had 102 Subsidized Housing Inventory (SHI) units (8.6% of their total), and Boylston had 26 SHI units (1.5% of their total). In Berlin, Riverbridge, a mixed-use village, plans to build 115 condominiums/apartments.

Student Enrollment

From 2000 until today, Berlin Memorial, Boylston Elementary, and Tahanto Regional's student enrollment numbers have fluctuated significantly, most recently due to the 6th grade students attending Tahanto, rather than their respective elementary schools. Berlin saw their largest student population in 2003 with 262 students and they saw their largest student population increase from 2009-2010. Berlin saw their lowest student population in 2011 with 201 students, and they are not much larger today; they only have only 3 more students. Boylston saw their largest student population in 2012 with 386 students and they saw their largest student population increase from 2011-2012. Table 6: Student Enrollment Numbers 2000-2014 includes all enrollment data for the past 14 years.

Table 7: Student Enrollment Numbers 2000-2014

Year	Berlin	Boylston	Tahanto
1999-00	246	368	408
2000-01	233	382	436
2001-02	241	362	427
2002-03	262	376	447
2003-04	246	377	461
2004-05	257	374	460
2005-06	249	383	475
2006-07	226	377	488
2007-08	216	369	478
2008-09	239	380	466
2009-10	212	377	444
2010-11	201	358	415
2011-12	213	386	418
2012-13	223	379	426
2013-14	204	315	542

(Source: DESE)

Student enrollment numbers are important to consider when discussing regionalization because they indicate trends and are tied to costs per pupil. School districts should monitor decreasing student populations as the student per teacher ratio may become too low to support the same number of teaching positions. This student per teacher threshold that the Berlin and Boylston schools can uphold without eliminating a teaching position should be determined. Student enrollment numbers also affect school building use, and although Berlin Memorial and Boylston Elementary would not be closed because of regionalizing, a more efficient use of building space might take effect, increasing the student per teacher ratio and decreasing the building cost per student.

Literature Review

This literature review discusses many important topics, including school district collaboration and regionalization, commonly held beliefs about these practices, the history of school districts and regionalization in MA, school district capacity, among others. Their importance is noted throughout the study and their conclusions are brought together in the final section: Conclusions, Options, and Recommendation.

Briefly, these topics help by describing how Massachusetts schools came to be structured in the way that they are; they allow for the analysis of each type and size of school district; and they help provide supporting or opposing conclusions for regionalization. Discussion about these topics will include important terminology as well as steps that can be taken to judge whether or not regionalization is logical.

School District Consolidation in Massachusetts: Opportunities and Obstacles, 2009

"School District Consolidation in Massachusetts: Opportunities and Obstacles" by Sarah Carleton, Christine Lynch, and Robert O'Donnell from the Department of Elementary and Secondary Education (DESE). Released in November of 2009, this report reviews the history as well as the issues associated with regionalization from a data and policy perspective. It includes State incentives to regionalize and has lessons learned from recent regional planning studies.

This report, hereinafter referred to as, "Opportunities and Obstacles," starts by stating that regionalization has been adopted by very few schools in Massachusetts and asks, "Why?" One theory is that Massachusetts already has an intricate network of relationships between school districts, allowing them to be fully functional while maintaining local control. The authors remark, however, that if demographic and fiscal trends continue, independence may not be so easy to maintain.

"Opportunities and Obstacles" begins its history of schools in Massachusetts by explaining their development and how Massachusetts initially attempted to reduce their numbers, "In colonial times, districts were established by any group of families willing to support a school, and at one point there were 2,250 districts in the state. In 1882, the State passed a law that consolidated districts by giving authority only to municipalities to fund and manage school districts (Carleton, Lynch, O'Donnell, 2009)." This law had the reverse effect, however, because small districts were formed in places with low populations. In 1949, the State tried to reduce the total number of school districts again by passing a law known as, "The Regional Schools Act of 1949." This law authorized the regional school district as an independent legal entity to encourage small towns to form consolidated school districts with a single school committee and specified rights and obligations for member towns. Again, despite their efforts, the number of school districts increased from 355 to 390 over the next 20 years. This increase can be attributed to schools maintaining independent elementary districts while creating regional secondary districts, as is the case in Berlin and Boylston.

In the 1960's, the Board of Education promoted the formation of K-12 districts based on the premise that educational programs would improve and governance would become streamlined, but the number of school districts remained practically the same. Regionalization would not be seriously considered until

1974 when Chapter 71, the State’s regional school law, was amended to provide financial incentives for regional schools (on the basis that these schools would have higher student enrollments). Through this incentive, the overall number of school districts in Massachusetts finally started to decrease.

The next law, known as the, “Massachusetts Education Reform Act,” also helped reduce the number of school districts by redirecting the funding that regional schools received into their Ch. 70 aid. Since this time, very few K-12 school districts have been formed, and the ones that did are, “mostly the result of consolidating secondary districts and their members into one K-12 regional district (Carleton, Lynch, O'Donnell, 2009).”

Currently, Massachusetts has 322 school districts:

Table 8: FY15 Public School Districts
Of the 322 Operating Public School Districts

<u>Number</u>	<u>Members</u>
172	K-12 Municipal
35	K-12 Regional
5	Elementary Regions
18	Secondary Regions
12	Tuition
51	Partial Municipal
<u>29</u>	Vocational
322	Total school districts

(Source: DESE)

The vast majority of school districts in MA are K-12 Municipal districts; the second most common are Partial Municipal districts; and the third most common are K-12 Regional districts. “Partial Municipal” from the table above and “partial school program” from the table below are interchangeable terms and reference towns that operate partial school systems; the 18 Secondary Regions in the State are comprised of 51 Towns and Cities. The following table enumerates how many MA towns and cities have each type of school district:

Table 9: City and Town Configuration of School Districts FY15
Of the 351 Cities and Towns

<u>Number</u>	<u>Members</u>
172	Cities and towns operate municipal K-12 Districts
101	Towns are members of regional K-12 academic districts
11	Towns are in multiple academic regional districts
4	Towns tuition out all grade levels
12	Towns tuition out grades 7-12 or 9-12
<u>51</u>	Towns operate a partial school program
351	Total cities and towns

(Source: DESE)

Motivating Factors to Regionalize

Opportunities and Obstacles identified the following motivating factors for regionalization:

1. Projected declines in student enrollment through 2019;
2. Improvement of long-term fiscal stability;
3. The addressing of district capacity and facility needs;
4. Reaction to a shrinking pool of qualified administrators;
5. Better articulation of curriculum from kindergarten to grade 12; and
6. Increasing district capacity.

The rationale behind the first motivating factor includes a long-term student enrollment forecast that anticipates a decline of 74,000 students by 2019. What's more is that most student enrollment loss has previously been seen within smaller districts, putting these schools at higher risk in later years.

Relative to the second motivating factor, the DESE discusses data that suggests how the type and size of school districts affects costs. The table that the DESE includes is shown below:

Table 10: FY08 Analysis of Median per Pupil Spending by District Type and Size
Table 3: Fiscal year 2008 median per pupil spending by district type and size

Enrollment	Municipal K-12		Regional K-12		Elementary		Secondary	
	N	\$ per pupil	N	\$ per pupil	N	\$ per pupil	N	\$ per pupil
Less than 1,500	23	\$11,950	8	\$13,656	66	\$12,442	10	\$13,686
1,500 – 2,999	59	\$10,812	11	\$10,885	4	\$11,517	9	\$12,172
3,000 – 4,499	42	\$11,185	10	\$10,241				
4,500 – 5,999	24	\$11,491						
6,000 +	29	\$12,536						

Note: Categories with only one district were excluded from this table.

Source: End of Year Pupil and Financial Reports

(Source: DESE)

Districts with less than 1,500 students have higher median costs per pupil than districts with between 1,500-5,999 students. The DESE made the following statement: "The higher median cost of small regional K-12s needs to be investigated further, as it casts some doubt on the economies of regionalizing unless a threshold size is reached." Fortunately, the Special Commission on School District Collaboration and Regionalization updated this information and included it in their 2011 Report to the Legislature. This report, which is evaluated in the next section, shows that K-12 districts with between 1,000-2,000 students, whether they are regional or not, have lower costs per pupil than elementary districts that have between 40-500 students, which Berlin Memorial and Boylston Elementary both have. The DESE mentions the range of per pupil expenditures among smaller districts is so great that their cost per pupil analysis might be explained by a town's ability to pay and the type of education being sought after. The

DESE recognizes that these individual choices may make it harder for a K-12 union of districts with varying expenditure levels to regionalize. The DESE summarizes their discussion about long-term financial stability and its role in motivating regionalization by stating that smaller districts might require greater economies of scale to preserve their educational programs over the long term, an important implication for Berlin and Boylston's small elementary districts.

The third motivating factor is supported by the State's incentive to build or renovate new school buildings. The Massachusetts School Building Authority overlooks the State's program to reimburse Towns for school construction costs, and major reforms have been made to the program in 2003. The DESE concludes on this motivating factor to regionalize by saying that when schools analyze their current and projected school building use needs, they can determine a more efficient use of existing facilities.

The fourth motivating factor was derived from anecdotal evidence that indicates that small districts are unable to pay competitive salaries for superintendents and other key staff members. This difficulty has been seen in Berlin and Boylston; there have been multiple superintendents and business managers in recent years. The DESE notes that, "fewer and larger districts could help solve this problem." The DESE then brings to light the fact that a large cohort of superintendents is reaching retirement age, and currently, retired superintendents are working on an interim basis to help fill this need, a practice that is unsustainable.

The final two motivating factors to regionalize, educational opportunities and district capacity, includes: a more coordinated curriculum from kindergarten to grade 12, improved academic accountability; increased professional development; and increased instructional leadership. These outcomes stem from investigations into student performance levels, spending levels, analyses of administrative roles and responsibilities, and the additional availability of resources that may come with regionalizing. Specifically, the DESE notes that, "Regionalizing into K-12 districts can free up resources to support a larger central office staff with more diversified skills and roles, including positions with a sole focus on curriculum and instruction." Seeing as Berlin and Boylston already have a central office, savings in administration may not be as high. However, focusing on the development of a coordinated curriculum may serve Berlin and Boylston's schools well. The capacity of each school is analyzed in further depth later in this feasibility study, using a tool developed by the Special Commission on School District Collaboration and Regionalization.

Before delving into barriers to regionalization, the DESE addresses why the State has a vested interest in the regionalization of schools.

The first reason the State has a vested interest in the regionalization of schools is that having less districts will simply oversight responsibilities and allow for the development of more comprehensive support systems for school districts. Second, when small districts become unstable due to declining enrollments and revenue insufficiencies, the resulting problems become the responsibility of the State. "Control boards, turnaround plans, district support teams, monitors, and other solutions have already been deployed a number of times in the last decade for both large and small districts (DESE, 2009)."

However, as the number of small districts experiencing problems grows, the State becomes less and less able to assess, prevent, or assist with deep-seated problems.

As for solutions besides regionalization, the DESE lists three:

1. Enter into larger purchasing cooperatives, possibly organized by regional councils, educational collaboratives, or municipalities;
2. Districts can cooperate directly with one another, such as in improving professional development; and
3. The DESE's new regional District and School Assistance Centers will foster stronger district networks focused on instructional leadership and instructional improvement.

The DESE then states how regionalization is not being posed as a clear solution to any one problem, it is up to each school district to analyze their current situation and determine whether or not regionalization will help.

Barriers to Regionalization

The DESE lists six barriers that school districts face when considering regionalization:

1. Fear of losing local control;
2. Controversy in the State's Chapter 70 formula;
3. Equalizing salary schedules;
4. Short term transition costs;
5. Transportation costs; and
6. Educational program differences.

First, loss of local control has always been a major obstacle for regionalization. "Voters want to maintain control over their local schools, and local preferences manifest themselves in a variety of ways, through program, curriculum, and personnel decisions as well as through spending (DESE, 2009)." Loss of local control also includes the perception that regionalizing will result in the closing of school buildings. This is not always the case as community goals, such as not transporting younger students a long distance, can prevent this. A regional agreement with the stipulation that at least one elementary school remain in each member town may provide a solution to this problem. Other ways to maintain aspects of local control comes from a study of schools in Franklin County and the more recent Ralph Mahar regional study. Both studies suggest to, "Seek legislation to create more powers for school councils in regional districts or provide more autonomy to individual schools while remaining under the regional district's authority (DESE, 2009)." One problem for regionalizing schools at the elementary level is the large disparity in per pupil spending among member towns. For this, the Ralph Mahar study includes, "legal opinions on regional agreement language that might allow towns to contribute separately to elementary schools within a regional district, and several partial regionalization strategies that could be pursued instead (DESE, 2009)." This may be of particular interest to Berlin and Boylston because regionalization could provide solutions to problems, but barriers such as loss of local control may prevent this from happening. This barrier was clearly stated by stakeholders in the school regionalization survey, and it is

expected to be a primary concern should the Berlin and Boylston school committees decide to move forward to regionalize PreK-12.

Second, the controversy within the State's Chapter 70 program lies within the fact that local contribution requirements for regional members is based on ability to pay rather than equalized contributions on a per pupil basis. A town's income and property wealth dictate their contribution levels, and in the past, this has deterred districts from considering regionalization if they feel the formula treats them unfairly. This barrier was voiced by stakeholders in Berlin and Boylston in the school regionalization survey, and continues to be a major factor in consideration regionalization.

The third barrier to regionalizing, equalizing salary schedules, is a result of State law that requires school teachers to earn no less than what he or she was making before regionalization. This does not mean, however, that all teachers are required to make the same amount. If having differing salary schedules among teachers and staff is non-negotiable, but immediate salary increases are not financially feasible among members towns, then a tiered process that leads to a single salary schedule at the end of an agreed upon time would overcome this barrier. Yet another way to deal with this problem comes from Dr. John Barry, Superintendent of Southwick-Tolland-Granville, who said in a phone interview that some of their teacher and staff pay changes were accommodated in their regionalization process, others were not, and others still were increased step-by-step. However, the DESE points out what is most likely to happen, as well as its result, by saying, "Practically speaking this means that the highest salary schedule among the districts will likely dictate the regional district's salary schedule. In cases where one salary schedule is considerably higher, the cost of salary increases may make it difficult for voters to endorse the regional plan (DESE, 2009)."

Regional transportation costs, the fourth barrier to regionalization, stems from the fact that regional districts usually encompass larger geographic areas and have to transport all of their students (K-12) who live outside a one and a half mile radius from their school. Municipal districts on the other hand, only have to transport students in grades K-6 who live more than a mile and half from their schools. This cost is being combatted with the State's Chapter 71 Regional Transportation Aid. Although this funding has been low recently, in FY15 it was raised to a 90% reimbursement rate. It is hopeful that this reimbursement rate will remain high; however, the DESE notes that because this funding source is uncertain, districts may be discouraged from regionalization for fear of incurring additional transportation costs.

The last barrier to regionalization elucidated in this article is the difficulty with aligning academic curriculums. Districts that have worked to bring special education students back into their district might not want to partner with a district that outplaces their higher-need students at much greater costs. However, the benefit of aligning curriculum is highlighted as essential for raising student achievement and making transitions from elementary schools to middle and high schools more successful. The school regionalization survey responses were in support of an aligned curriculum, which indicates that this barrier is considered more of a growth opportunity for these two towns.

DESE Policy Considerations and Recommendations

Opportunities and Obstacles concludes by saying the variety of district configurations in the State exemplifies the fact that there is no one-size-fits-all solution to a school district's problems. The DESE also recognizes that the benefits of regionalization may not outweigh the costs. However, over the course of the next decade, the State believes that the changing demographic landscapes and their associated costs may ultimately require schools to regionalize. The DESE explains that their next steps would be to develop tools to make it easier for school districts to: coordinate analyses and problem-solving in support of regionalization; evaluate whether or not regionalization would save money; evaluate governance options which would address typical challenges that make towns and districts reject considering regionalization; and weigh pros and cons of intermediate steps such as superintendency unions, purchasing agreements, and regional collaboration on curriculum and professional development.

This article was of particular importance for Berlin and Boylston as many of the same benefits applied to the proposed PreK-12 regionalized school. Also, many of the concerns expressed by stakeholders in both Towns were mentioned in this article. It is important to see that these benefits and barriers are not unique to Berlin and Boylston because many of the obstacles have been overcome by other districts in recent regionalization efforts.

In addition to the motivating factors and barriers to regionalization mentioned in this article, the DESE compiled a list of advantages and challenges to regionalization in their 2010 article titled, "Regional Planning Study Results." This article and its subsequent lists are included later in this feasibility study. The lists were compiled after reviewing many school regionalization studies, and Berlin and Boylston's perceptions and concerns are adequately represented. The analysis of Berlin and Boylston's perceptions and feedback about regionalization is mentioned at the end of the literature review.

Report to the Legislature, 2011

The second report referenced in this literature review was created by The Special Commission on School District Collaboration & Regionalization (Special Commission). Their 2011 report titled, "Report to the Legislature," the authors state their recommendations to the State are based off of two key findings or observations:

1. Incentives work better than mandates in promoting school district collaboration and regionalization at the state level; and
2. Given the complex affiliations and diverse configurations of school districts across the Commonwealth, prescribing a "one-size-fits all" approach to collaboration and regionalization is impractical.

Collaboration, Regionalization, and School District Capacity

The Special Commission's Report begins its discussion on collaboration and regionalization by indicating how the economic recession, declining enrollments, and rising costs have made people think about various approaches to save money, build capacity, increase efficiency, and extend the reach of limited resources, "Two such approaches include the consolidation of school districts (i.e., "regionalization")

and the consolidation of services (i.e., “collaboration”), both of which can help school districts to build capacity and improve educational efficiency, quality, and access (Chang-Diaz et al., 2011).” Both collaboration and regionalization address what the Special Commission believes to be the purpose of school districts,

“The Commission believes that the core responsibility of school districts is to provide an increasingly diverse population of students with a broad range of high-quality educational opportunities. All school districts must have a sufficient level of capacity to execute this core function and local stakeholders should continually pursue opportunities to build the capacity of their districts (Chang-Diaz et al., 2011).”

School District Capacity is later defined as,

“the overall ability of a school district to achieve one primary goal – to provide all children with a broad array of high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and citizens in a democratic society (Chang-Diaz et al., 2011).”

The Commission then details the tasks that demonstrate the successful execution of district capacity:

- Design and implementation of challenging, aligned, and coherent instructional programs and services (consistent with state and national standards) that are dedicated to the development of the whole child;
- Evaluation of program effectiveness through analysis, on a regular and ongoing basis, of student growth and achievement data using clearly identified and developmentally appropriate criteria;
- Recruitment, retention, and development of highly qualified staff members, and regular evaluation of their ability to promote high-quality student learning and social/emotional development;
- Effective communication and collaboration with parents, families, local and state officials, and other community members to promote student achievement and development;
- Support and promotion of positive, nurturing, and safe learning environments in all classrooms and schools; and
- Maximization of the allocation and expenditure of district funds, resources, and materials, and accurate monitoring of expenditures over time.

The Special Commission states in addition to these goals, school districts must operate efficiently to achieve the abovementioned goals, and that, “The components of district capacity are directly related to these tasks, and can be organized into two broad categories: 1) the instructional, human, financial, and capital resources needed to execute its primary tasks; and 2) the organizational structures and management systems needed to ensure that the district functions effectively and efficiently.

In order to determine capacity, the Commission developed a capacity self-assessment tool, aimed at providing, “an objective process for performing an initial capacity analysis, the results of which can be used to guide conversations about collaboration and regionalization and inform district-wide strategic

planning decisions (Chang-Diaz et al., 2011).” The Commission recommends using this tool for three purposes, to: “1) determine existing levels of capacity and areas of need; 2) establish a starting point for engaging in further analysis and targeted conversations about collaboration, regionalization, and other capacity-building strategies; and 3) inform ongoing conversations about ways to increase capacity and improve programs and services. In brief, completing the capacity self-assessment tool is the Commission’s first recommendation in The Report. This recommendation is also the only recommendation from The Commission for school districts or interested stakeholders to engage in. The other recommendations, for regionalization or collaboration, are directed toward the State of Massachusetts.

The recommendations for the State to support regionalization are as follows:

1. Provide support for regional planning efforts; including additional funding and technical assistance;
2. Provide support for the regional transition process, including additional funding and technical assistance;
3. Ensure consistent and reliable regional transportation appropriation;
4. Increase capital support for regionalization initiatives;
5. Centralize information and resources for regionalization;
6. Provide resources for the Department of Elementary and Secondary Education (DESE) to increase support for regionalization; and
7. Enact legislation to address existing barriers to and increase incentives for regionalization.

For collaboration, the Commission recommends that the State should, “develop and implement a more effective statewide model of collaboration, and should leverage the existing infrastructure, expertise, and resources provided by educational collaboratives (“collaboratives”) to achieve this goal (Chang-Diaz et al., 2011).” In order to do this, however, the state must, “implement better performance measures, oversight, and accountability standards before collaboratives can be used more effectively and efficiently on a statewide basis (Chang-Diaz et al., 2011).” Therefore, the Commission’s recommendations to the State for collaboration are to promote the development and better use of collaboratives. In order to do this, they recommend to:

1. Enact legislation to improve the governance, structure, accountability and oversight of educational collaboratives;
2. Provide incentives for inter-district collaboration;
3. Centralize resources and information on collaborative programs and services; and
4. Provide resources for ESE to support and promote collaboration.

The only recommendation the Commission has for school districts to engage in directly, is the capacity self-assessment tool.

The Report concludes by implying school districts provide managerial, political, and instructional functions in support of their schools, and that capacity at all levels is required in order to do so. The Commission says that the primary concern for school districts needs to be the development or

maintenance of capacity so that they can fulfill their core responsibilities of providing all students with a broad range of high-quality educational opportunities. The Commission feels that collaboration and regionalization are two practical solutions for existing problems in school districts, whether they are educational, fiscal or related to the efficient and effective delivery of educational services.

Capacity Assessment Tool

The Special Commission first started creating their Capacity Assessment Tool by identifying three dimensions of school district capacity: the academic and programmatic quality of school districts; overall district capacity, including the effectiveness of the central office; and the fiscal viability, efficiency and long-term sustainability of school districts. Within these dimensions, they identified qualitative and quantitative criterion that encompassed the range of data each district faces, including: current & projected enrollments; financial trends; instructional capacity; curricular & program offerings; performance indicators; capital facilities; administrative capacity; collaboration; and community indicators. Through these categories of school district capacity, the Special Commission developed a set of indicator statements in which a yes or no answer is required. The questions are formulated so that an affirmative answer is indicative of a deficiency or lack in school district capacity; the more “yes” answers you have, the higher probability that your school district has room to grow. Their tool can also be used piecemeal, where individual categories or indicator statements are handled one-by-one. In this way, it identifies different areas of need, so that town and school officials, as well as school committee members, local stakeholders and the general public, can determine the most appropriate way to enhance the capabilities of their district. As previously stated, this tool is meant as a starting point and a cause for discussion. The Special Commission clearly suggests that the results of the tool be used to:

1. Identify the areas of capacity that are strongest and those that need improvement;
2. Provide a starting point for engaging in further analyses and targeted discussions about regionalization, collaboration, or other capacity-development responses; and
3. Inform ongoing discussions about the capacity of the school district and ways to improve programs and services.

The Special Commission includes a disclaimer about the boundaries of the use of this tool, “This tool is designed to supplement, not supplant, the local assessment process and should be used in conjunction with existing mechanisms that measure the capacity of the district to serve its students. Moreover, it is not a comprehensive or scientific tool, and should not be treated as one (Chang-Diaz et al., 2011).”

Before the Special Commission introduces the tool itself, they offer three possible capacity-development strategies:

1. Collaborating with one or more districts, cities, towns or other entities to address one or more areas of need identified by the assessment tool;
2. Forming a regional school district to address one or more areas of need identified by the assessment tool; or
3. Continue operating with no changes in the district’s level of collaboration or governance structure.

Since the factors that create school district capacity are constantly in flux, the Special Commission suggests that this tool be revisited continuously, in order to judge whether or not the school district in question is, “operationally efficient, fiscally sustainable, and has the capacity to provide high quality academic programs and sustain long-term, continuous improvement (Chang-Diaz et al., 2011).”

The Capacity Assessment Tool was used to assess the capacity of Berlin Memorial, represented by blue ink, Boylston Elementary, represented by red ink, and Tahanto Regional, represented by green ink.

Current Assessment

Berlin Memorial
Boylston Elementary
Tahanto Regional

CAPACITY ASSESSMENT TOOL






















Instructions: Using the suggested data identified in the column labeled “Data Source”, check the appropriate box (“yes” or “no”) based on whether or not the corresponding statement applies to the district. Refer to Table 1 on page 18 for additional guidance on accessing and using the data to complete the assessment.

1. Current & Projected Enrollments	YES	NO	Data Source
a. Current enrollment is below the median enrollment for districts of the same group: <ul style="list-style-type: none"> • K-12 District = 2,900⁵ • Elementary District = 362⁶ • Secondary District = 1,300⁷ 	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DART
b. Enrollments have declined over the past several years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DART
c. The number of students leaving through choice, charter or tuition agreement has increased over the past several years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	ESE Finance
d. The district relies on incoming choice or tuition students to support programs and budget	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ESE Finance
2. Financial Trends	YES	NO	Data Source
a. The district has operated on a budget that is at or below level funded or level services for several years	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Local
b. School budgets and/or regional assessments to member towns have increased, while programs/services remain the same or have decreased over the past several years	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Local
c. The district has instituted or increased fees for programs/services within the last several years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Local
d. Teacher salaries are not commensurate with those in like districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ESE Finance
e. Administrative costs per pupil have increased or are higher than such costs in like districts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DART Finance
f. Operations and maintenance costs per pupil have increased or are higher than such costs in like districts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DART Finance
g. In-district transportation costs per pupil have increased or are higher than such costs in like districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DART Finance
h. Out-of-district transportation costs (per out-of-district pupil) have increased or are higher than such costs in like districts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DART Finance
i. Professional development spending per teacher has decreased or is lower than such spending in like districts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DART Finance

⁵ Represents the median enrollment for all K-12 districts (municipal and regional) based on FY11 enrollment data from the DESE

⁶ Represents the median enrollment for all Elementary districts (districts that operate schools that do not include grades 9 and higher) based on FY11 enrollment data from the DESE

⁷ Represents the median enrollment for all Secondary (regional) districts based on FY11 enrollment data from the DESE

3. Instructional Capacity (by school and district)	YES	NO	Data Source
a. Class size has increased in the last several years		<input type="checkbox"/>	<i>Local</i>
b. Class size is higher than in like districts	<input type="checkbox"/>		<i>Local</i>
c. Student/teacher ratio ⁸ has increased in the last several years		<input type="checkbox"/>	<i>DART Finance</i>
d. Student/teacher ratio is higher than said ratio in like districts			<i>DART Finance</i>
e. The teacher turnover rate has increased or is greater than the turnover rate in like districts	<input type="checkbox"/>		<i>DART</i>
4. Curricular & Program Offerings	YES	NO	Data Source
a. The number and variety of course offerings is fewer than in like districts (e.g. the number and variety of foreign language courses, AP courses, electives, vocational programs, etc.)		<input type="checkbox"/>	<i>Local</i>
b. Course offerings have been reduced or eliminated in the last several years		<input type="checkbox"/>	<i>Local</i>
c. Special programs and service offerings (art, music) have been reduced or eliminated in the last several years		<input type="checkbox"/>	<i>Local</i>
d. Extracurricular offerings have been reduced or eliminated in the last several years	<input type="checkbox"/>		<i>Local</i>
e. Early childhood offerings have been reduced or eliminated in the last several years	<input type="checkbox"/>		<i>Local</i>
f. Out-of-district special education placements have increased in the last several years	<input type="checkbox"/>		<i>Local</i>
g. Special education costs have increased or are higher than such costs in like districts		<input type="checkbox"/>	<i>ESE Finance</i>
h. Transportation services have been reduced in the last several years		<input type="checkbox"/>	<i>Local</i>
5. Performance Indicators	YES	NO	Data Source
a. Percentage of students scoring at or above proficient on the MCAS has declined or remained stagnant over the last several years			<i>DART</i>
b. Student SAT, PSAT and/or ACT scores have declined in the last several years	<input type="checkbox"/>		<i>Local</i>
c. Status of high school graduates (college, careers) has declined	<input type="checkbox"/>		<i>Local</i>
d. District has received a warning or has been placed on probation by the New England Association of Schools and Colleges	<input type="checkbox"/>		<i>Local</i>
e. Dropout rate has increased in the last several years	<input type="checkbox"/>		<i>DART</i>
f. Dropout rate is higher than in like districts	<input type="checkbox"/>		<i>DART</i>

⁸ "Teacher/student ratio" is defined as total student enrollment:total licensed teachers employed by the district

g. Four-year or five-year cohort graduation rates have declined in the last several years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>DART</i>
h. Four-year or five-year cohort graduation rates are lower than in like districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DART</i>
i. Attendance rate has decreased in the last several years	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DART</i>
j. Attendance rate is lower than in like districts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DART</i>
6. Capital Facilities	YES	NO	Data Source
a. One or more district schools received a “below average utilization” rating in the most recent MSBA Needs Survey	<input checked="" type="checkbox"/> N/A <input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>MSBA</i>
b. One or more district schools received a “building conditions” rating of 3 or 4 in the most recent MSBA Needs Survey	<input type="checkbox"/> N/A <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>MSBA</i>
c. One or more district schools received a “general environment” rating of 3 or 4 in the most recent MSBA Needs Survey	<input type="checkbox"/> N/A <input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>MSBA</i>
d. The district recently attempted to submit a Statement of Interest (SOI) for MSBA funding that was defeated at the local level	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
7. Administrative Capacity	YES	NO	Data Source
a. The number of district and/or school administrative positions has decreased over the last several years	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>DART Finance</i>
b. District administrators are responsible for more functions than administrators in like districts	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>MARS</i>
c. The district does not have enough administrators to effectively address instructional and achievement issues for students, particularly students with specific and differentiated needs (e.g. English language learners, students receiving special education services, etc.)	<input type="checkbox"/>	<input type="checkbox"/>	<i>MARS</i>
d. The district does not have enough administrators to effectively recruit and maintain a high-quality educator workforce	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>MARS</i>
e. The district does not have enough administrators to create and maintain effective lines of two-way communication with parents and family members and other community stakeholders	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>MARS</i>
f. A greater number of district administrators are responsible for operational versus instructional issues	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>MARS/Local</i>
g. The administrative turnover rate has increased or is higher than the rates in similar districts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DART</i>
h. District Administrators report to more than 1 school committee	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Local</i>
i. The current structure of the central office and configuration of administrators do not support optimal efficiency and effectiveness with regard to the district’s ability to execute its core functions, including: 1) communication among administrators and also among administrators, principals, teachers, and staff members; 2) the collection and continuous analysis of multiple types of data; and 3) the management of instructional,	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Local</i>

human, fiscal, and other resources			
8. Collaboration	YES	NO	Data Source
a. The district has not explored the possibility of providing joint academic and extracurricular programs with other districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
b. The district does not participate in cooperative purchasing programs with other districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
c. The district does not partner with other districts or utilize an educational collaborative to offer professional development programs for its staff	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
d. The district does not belong to an educational collaborative	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
e. The district does not participate in a collaborative or cooperative transportation service program	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Local</i>
f. The district does not partner with other districts or utilize an educational collaborative to provide special education programs and services for its students	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
g. District leaders and/or administrators do not meet with colleagues on a regular basis to discuss common challenges and implement common solutions	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
h. District staff members do not participate in and/or belong to statewide professional associations (e.g. Massachusetts Association of School Superintendents, Massachusetts Association of School Committees, Massachusetts Elementary School Principals Association, Massachusetts Secondary School Administrators Association, Massachusetts Teachers Association, American Federation of Teachers – Massachusetts, etc.)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>Local</i>
9. Community Indicators	YES	NO	Data Source
a. One or more communities within the district have a negative Municipal Revenue Growth Factor (MRGF) ⁹	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DOR</i>
b. Property values within the district have decreased over the past several years	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>DOR</i>
c. The bond rating of one or more communities within the district has decreased within the last several years	<input type="checkbox"/>	N/A <input type="checkbox"/>	<i>Local</i>
d. Communities within the district have a higher unemployment rate than the rates in like districts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<i>EOLWD*</i>

*Executive Office of Labor & Workforce Development unemployment rate by city/town:
http://lmi2.detma.org/lmi/lur_area.asp?AT=01&A=000025&Dopt=TEXT

Data Source	Description
DART	<i>District Analysis and Review Tool.</i> To access and review the data for questions associated with the "DART" source, download the "District Analysis and Review Tool" located on ESE's website – http://www.doe.mass.edu/sda/dart/
DART Finance	<i>DART Finance and Staffing tool.</i> To access and review the data for questions associated with the "DART Finance" source, download the "DART Finance and Staffing" file located on ESE's website – http://www.doe.mass.edu/sda/dart/
DOR	Department of Revenue data. To access and review the data for questions associated with the "DOR" source, refer to the following information located on the Department of Revenue's website – For "Municipal Revenue Growth Factor" (MRGF) data, refer to: http://www.mass.gov/?pageID=dorterminal&L=4&L0=Home&L1=Local+Officials&L2=Municipal+Data+and+Fina ncial+Management&L3=Data+Bank+Reports&sid=Ador&b=terminalcontent&f=dls_mdmstuf_mungrowth&csid=Ador For property values/tax data, refer to: http://www.mass.gov/?pageID=dorterminal&L=4&L0=Home&L1=Local+Officials&L2=Municipal+Data+and+Fina ncial+Management&L3=Data+Bank+Reports&sid=Ador&b=terminalcontent&f=dls_mdmstuf_proptax&csid=Ador
ESE Finance	ESE School Finance information. To access and review the data for questions associated with the "ESE Finance" source, refer to the appropriate charts located on ESE's website – http://finance1.doe.mass.edu/statistics/
MSBA	<i>Massachusetts School Building Authority.</i> To access and review data for questions associated with the "MSBA" source, refer to the MSBA's "2010 Needs Survey" report located on MSBA's website – http://www.massschoolbuildings.org/sites/default/files/edit-contentfile/Our%20Programs/2010_Needs_Survey_Report_29April2011.pdf
MARS	<i>Massachusetts Association of Regional Schools.</i> To access and review data for questions associated with the "MARS" source, refer to the MARS "Central Office Capacity" report located on ESE's website – http://www.doe.mass.edu/research/reports/1109mars.pdf <i>**Users are encouraged to use the survey instrument found in "Appendix A" to determine the appropriate response for each question associated with the "MARS" source.</i>
LOCAL	Local data. Users should refer to local data systems and resources to respond to the corresponding statements. Interested stakeholders, other than those employed within the school district, should seek these data and information from local district staff.

Since this tool is close to four years old, some of the data was not under the URLs provided. However, research into the organizations on the left in the table above did bring about the data needed to successfully answer the tool's indicator statements accurately. Most of the data utilized was derived from the DESE's, "DART for districts" and "DART Finance and Staffing" workbooks.

Capacity Analysis

At this stage of completion in the Capacity Assessment Tool, it is clear that all three schools have strengths as well as weaknesses. Berlin Memorial can improve by reducing their administrative costs and increasing their professional development spending. Berlin Memorial can also improve by raising their student's MCAS scores. Boylston Elementary should focus on its administration, reducing costs as well as turnover rates. Tahanto Regional can address their educational opportunities, increasing the number and variety of courses that they offer. All three schools should be aware of their declining enrollments. Although Tahanto had a considerably larger 2013-2014 enrollment due to the 6th grade moving from the Elementary Schools to the Middle School, in the 2012-2013 school year they had 10 less students than in 2001, and two years before that was their second to lowest enrollment in the last fourteen years. Maintaining or increasing student enrollment will maintain current course offerings.

Administrative capacity for all three schools should be increased: the number of administrative staff has decreased, they have more responsibilities than administration in like districts, and they are responsible for more operational as opposed to instructional responsibilities. This results in less time for teacher evaluations, which in turn affects student performances. As for strengths, Berlin Memorial is self-sustaining; they don't rely on incoming choice or tuition students to support programs. Boylston Elementary is strong in their MCAS performance levels, they have good attendance rates, and their administration has the ability to hire qualified teachers as well as stay in contact with student's parents. Tahanto Regional is strong with its extracurricular offerings, has sufficient student performance figures, and has been engaging in collaboration to improve course offerings and reduce costs. All three schools are strong by having low student transportation costs and by having teachers that engage in professional associations to constantly improve their education and skills.

Considering the current state of this tool's completion, it is obvious that further investigation is needed to obtain a more comprehensive view of the capacity of each school.

Cost per Pupil

The Report identified the median, minimum, and maximum spending per pupil for each size district. Although this data is from 2010, it provides a look into how much Berlin Memorial, Boylston Elementary, and Tahanto Regional spends per student, as well as how much a K-12 regional school district of their size would cost on average, per student. This data, originally derived from the DESE, is not available for years later than 2010.

Table 11: School District Groups, Enrollment, Prevalence, and Cost per Pupil in MA

FIGURE 3. 2010 EXPENDITURES PER-PUPIL COMPARISONS BY DISTRICT GROUP/SIZE⁴

District Group	Enrollment (2010)	Number of Districts	Median Per Pupil	Minimum Per Pupil	Maximum Per Pupil
K-12	150-1,000	10	\$13,160	\$9,546	\$29,119
	1,000-2,000	47	\$11,713	\$9,134	\$22,803
	2,000-3,000	46	\$11,397	\$9,859	\$18,591
	3,000-4,000	37	\$11,652	\$9,953	\$14,276
	4,000-5,000	27	\$11,980	\$9,837	\$18,960
	5,000-8,000	28	\$12,071	\$9,963	\$25,737
	8,000-26,000	12	\$13,231	\$11,667	\$16,597
	55,000	1	\$16,666	\$16,666	\$16,666
Elementary	40-500	43	\$13,728	\$10,147	\$23,905
	500-1,000	18	\$11,236	\$9,574	\$15,646
	1,000-3,200	10	\$11,918	\$9,740	\$21,812
Secondary	400-1,000	6	\$14,458	\$13,410	\$23,439
	1,000-3,000	13	\$13,695	\$10,920	\$18,872
Vocational/ Agricultural	400-1,000	18	\$19,416	\$14,347	\$28,962
	1,000-2,200	12	\$17,324	\$15,622	\$19,948

⁴ Table adapted from the DESE District Analysis and Review Tool (DART) for Finance and Staffing. See <http://www.doe.mass.edu/sda/dart/>

(Source: “Special Commission’s Report” by Chang-Díaz et. Al)

In 2010, the most costly type of school district in Massachusetts was the Vocational/Agricultural school district. This type of district had median per pupil spending rates of \$17,324 and \$19,416, depending on its size. Both K-12 districts and Elementary districts have a “sweet spot,” where a middle sized district per pupil costs is less than both their larger and smaller counterparts. K-12 districts with between 2,000-3,000 students have the lowest median (\$11,397 per pupil); followed by K-12 districts with between 3,000-4,000 students (\$11,652 per pupil), and finally K-12 districts with between 1,000-2000 students (\$11,713 per pupil). For Elementary districts, the sweet spot was between 500-1,000 students (\$11,236

per pupil). Elementary districts with enrollments between 500-1,000 students were also the least expensive type of district in Massachusetts in 2010.

Applying this information to Berlin Memorial, Boylston Elementary, and Tahanto Regional, we find that all three schools individually were in the more expensive categories based on their 2010 enrollment.

Based on the median per pupil cost in the Report, if Berlin Memorial, Boylston Elementary, and Tahanto Regional were regionalized in 2010, they would have become a K-12 district with a total enrollment of 1,033; putting them in the 1,000-2,000 K-12 District enrollment size range (median cost per pupil of \$11,713), for a total expenditure of \$12,099,529. The size of combined K-12 district is the third less expensive size for K-12 districts.

Altogether, these three schools spent \$13,928,862 on their students. Using the regionalized scenario for 2010, a savings in the amount of \$1,829,333 would have been a recognized (\$13,928,862 – 12,099,529), or a per pupil savings of \$1,770.89.

Table 12: Current and Proposed School District Type and Size Median Costs per Student Analysis


Schools	School District Type	Student Enrollment (and enrollment range within district)	Median Cost per Pupil for current district type and size	Student Costs (student enrollment*median cost per pupil)
Berlin Memorial	Elementary	212 (40-500)	\$13,728	\$2,910,366
Boylston Elementary	Elementary	377 (40-500)	\$13,728	\$5,175,456
Tahanto Regional	K-12	444 (400-1000)	\$13,160	\$5,843,040
			Current Total	\$13,928,862
Proposed Berlin-Boylston PreK-12	K-12	1,033 (1,000-2,000)	\$11,713	\$12,099,529 (Proposed Total)
			Savings	\$1,829,333 (Current Total minus Proposed Total)

(Source: DESE, CMRPC)

This is a clear case in support of regionalization. The projected savings could have supported: Expanding educational opportunities; reducing taxes; increasing or updating educational technology; hiring executive or clerical staff in the central office to free administration from operational tasks in order for them to focus on instructional leadership, therefore improving teacher and student performances; or repairing school buildings.

For reference, Berlin and Boylston's recent median cost per pupils is included below:

Table 13: Recent Per Pupil Costs in Berlin and Boylston:



Expenditure Per Pupil Detail 2011-2013*

All funding sources included	Berlin			Boylston			Berlin-Boylston						State		
	2011	2012	2013*	2011	2012	2013*	2011	2012	2013*	2011	2012	2013*	2011	2012	2013*
FTE Pupils															
In-district	203.2	216.6	221.9	364.1	383.7	383.0	409.2	418.8	425.8	--	--	--	924,977.9	919,228.8	918,545.1
Out-of-district	19.8	10.1	13.7	31.5	38.1	38.1	90.8	87.0	88.6	--	--	--	59,639.8	59,858.4	63,339.7
All pupils	223.0	226.7	235.6	395.6	421.8	421.1	500.0	505.8	514.4	--	--	--	984,617.7	979,087.2	981,884.8
Expenditures															
Per in-district pupil	17,396	16,564	18,981	11,891	13,282	13,398	13,659	13,546	13,562	--	--	--	12,890	13,121	13,498
Per out-of-district pupil	6,304	12,508	8,733	16,307	14,688	13,599	20,395	21,720	22,140	--	--	--	20,548	21,549	21,473
Per pupil	16,411	16,384	18,385	12,243	13,409	13,416	14,883	14,952	15,039	--	--	--	13,354	13,636	14,012

(Source: DESE)

Which Central Mass School Districts Spend the Most Per Pupil, 2014

In a more recent article (March, 2014) from www.golocalworchester.com, GoLocal used DESE data to determine how much each school district in Central Massachusetts spends per student and then listed the top 25 spending schools. Quabbin Regional School District was twenty-fifth, with the lowest costs per student (\$12,145); Montachusett Regional Vocational Technical School in Fitchburg ranked number 1, with the highest cost per student (\$17,281); and the State average was listed as \$13,636. Tahanto was fourth with a cost per student of \$14,952, or \$1,316 over the State average. There were six regional school districts in the list (not including regional vocational schools) and they all had lower costs per student than Tahanto. Northboro-Southboro Regional School District was seventh, Ralph C Mahar Regional School District was eighth, Athol-Royalston Regional School District was ninth, Nashoba Regional School District was seventeenth, Spencer-East Brookfield Regional School District was twenty-first, and Quabbin Regional School District was twenty-fifth. Four out of the six lower school districts are regionalized K-12: Quabbin Regional School District, Athol-Royalston Regional School District, Spencer-East Brookfield, and Nashoba Regional School District. According to this report, K-12 regionalization appears to have the lowest costs per student for schools in Central Massachusetts.

Although the Special Commission was formed to determine a way to prescribe regionalization or not, the Special Commission determined that the needs of each school district dictate whether or not collaboration and/or regionalization are practical.

A Study of Central Office Capacity in Regional Districts, 2009

Building upon the discussion about school district capacity, the Massachusetts Association of Regional Schools (MARS) wrote a report titled, "A Study of Central Office Capacity in Regional Districts" from November of 2009. For this report, MARS was hired by the Department of Elementary and Secondary Education (DESE) to conduct research on school district size and its relationship to the functions of central office staff, also referred to as, "central office capacity." This report is the same one referenced at the end of the Special Commission on School District Collaboration and Regionalization's Capacity Assessment Tool. DESE decided to fund the study because they needed factual information on the relationship between school district size and central office capacity when questions continued to be raised about it at meetings on school district collaboration and regionalization. In short, a prevailing assumption about the relationship needed to be confirmed or denied.

The most common assumption that came about in discussions about central office capacity was that, “smaller districts’ administrators have less time and fewer personnel to provide instructional supervision directed at continuous improvement of classroom teaching (MARS, 2009).” This report is pertinent to our school district regionalization feasibility study because the ability of central office staff to efficiently handle work, allowing for instructional supervision directed at continuous improvement of classroom teaching has been a main concern of stakeholders in both Berlin and Boylston from the start. For example, a resident of Berlin responded in the regionalization survey, “(I hope that community members and the student body from Berlin and Boylston would gain) *more efficiency for the Central Office Staff and School Committees, better use of staffing and resources and therefore higher student achievement* (from regionalization).” Also, a resident from Boylston wrote, “(I hope that the) *administrative personnel’s time would be better spent developing new ways to improve the curriculum and more creative ways of funding it.*”

The study involved six current or recently retired regional superintendents who developed a survey for other superintendents of MARS’ member regional districts to take. Regional vocational-technical high schools were not included because, “their regional structure, educational program, and typical central office staffing cannot be compared directly with academic districts (MARS, 2009).” MARS identified 43 central office functions and 6 categories in which they fell under: school committee and community; instructional leadership; financial management; human resources; operations; and technology systems. The superintendents that took the survey were asked to indicate which staff had which responsibilities. In order to obtain complete and usable responses, MARS team members worked with the respondents on the phone or in person. Of the 41 completed surveys, 28 were from superintendents of regional K-12 districts, three were from regional secondary schools, and 10 were from K-12 superintendency unions. The superintendency unions included 39 elementary districts and the study involved 80 districts in all.

The surveys were analyzed in terms of the size of the central office as well as the functions of specific positions. The study reviewed the positions of: superintendent; SPED administrator; business manager; and technology director.

For superintendents, the study found that they assigned themselves primary responsibility for working with key government agencies, managing principals, and heading union negotiations. For secondary responsibilities, superintendents generally assigned themselves tasks in instructional leadership or fiscal management.

For SPED administrators, the study found that they were assigned more primary and secondary responsibilities in smaller districts. In fact, SPED administrators took on twice as many responsibilities in smaller districts than in larger ones.

For school business officials/managers, the study found that they had primary responsibilities in finance and operations, but more often than not, the top three central office tasks of financial reporting, managing budgets, and preparing budgets were assigned to superintendents, assistant superintendents, or “other district administrators.”

For technology directors, the study found that their primary responsibilities included maintaining computer systems, administration data systems, and instructional technology, as well as putting together ESE/state data reports.

The study also looked at clerical staff, how many there were in each district as well as their functions in central offices. MARS found that the number of clerical staff in larger districts was much greater than the number of clerical staff in smaller districts, “The proportion of clerical FTEs to administrators increased dramatically with district size in the study sample; while the median number of administrators increased by 50%, clerical staff increased by 250%.” MARS found that clerical staffs’ primary responsibilities were mostly financial, but that they also handled data and technology tasks.

The summary of this study began by saying how this study provides concrete evidence of how “small size constrains the capacity and efficiency of smaller districts (MARS, 2009).” The reason for this is that smaller districts have a range of staff FTEs but they have less executive and/or clerical staff to cover the same functions as larger ones. The result is that,

“Superintendents and clerical staff in smaller districts have primary responsibility for more functions than in larger districts. This indicates that these superintendents are likely to have less time available for instructional leadership, and that clerical staff often have primary responsibility for functions that in larger districts are done by business officials or technology directors.”

In brief, the prevailing assumption that smaller districts have less time and fewer personnel to provide instructional supervision directed at continuous improvement of classroom teaching was found to be true.

This report ended its Summary by stating instructional leadership was a main focus of the study and that Superintendents’ responsibility for instructional leadership could mask a significant difference in time and energy in two ways:

1. In small districts, a greater number of other responsibilities compete for the superintendent’s time; and
2. In K-12 superintendency unions that manage several districts through one central office, there are greater demands of governance entities, and management and reporting.

The report stated as part of its Conclusions section that, “the extra time devoted to evening meetings and administrative reporting by superintendents and central office teams of superintendency unions is largely invisible in the study’s data, but it represents a significant loss of time for other tasks, e.g. instructional leadership.”

This study’s Summary and Conclusions are pertinent to our feasibility study because it shows that regionalizing can: eliminate the extra time devoted to evening meetings; reduce the amount of various responsibilities on superintendents; and increase instructional leadership and therefore improve teacher and student performances. Also, if regionalizing poses a financial gain, additional specialized executive

and/or clerical staff could be hired to further reduce the amount of extraneous responsibilities on superintendents, assistant superintendents, SPED administrators, business officials, or technology directors, improving the current staff's efficiency and effectiveness.

A Cost-Benefit Analysis of School Regionalization in Massachusetts, 2010

The next article pertinent to this feasibility study is titled, "A Cost-Benefit Analysis of School Regionalization in Massachusetts." This report, hereinafter referred to as, "The Cost-Benefit Analysis" was sponsored by Massachusetts State Representative Anne M. Gobi, developed by three Worcester Polytechnic Institute (WPI) students, and overlooked by two WPI professors. Other authorities on school district regionalization also provided support, including Dr. Steve Hemman, Executive Director of the Massachusetts Association of Regional Schools, and Roger Hatch, School Finance Programs Administrator of the Department of Elementary and Secondary Education (DESE). The Cost-Benefit Analysis, written in October of 2010, focuses on school regionalization in Worcester County and primarily serves to test hypotheses about school regionalization and consolidation through a cost-benefit analysis. The Cost-Benefit Analysis is especially relevant to our feasibility study because Berlin and Boylston are both located within Worcester County. Five hypotheses about school district consolidation and regionalization were found through a literature review and were subsequently tested.

The Executive Summary of the Cost-Benefit Analysis begins by stating that the price of education is ever increasing and that State and local authorities are constantly looking for new ways to save money. The goal of this report was to, "determine the social and fiscal costs and benefits of school consolidation (Alvarez et al., 2010)." It's important to note that the authors use Streifel, Foldes & Holman's definition of school consolidation, "the combining of two or more schools or districts in a certain region into one regionalized school or district." Consolidation, then, does not necessarily mean combining school districts into one school building, but rather expanding school district boundaries to include one another. The authors collected data from the DESE, including SAT and MCAS scores, graduation rates, and per-pupil spending. Socioeconomic data was also gathered such as: percent minority; percent free or reduced lunch; student to teacher ratio; and median income. The six hypotheses tested were:

1. Regionalized school districts will have higher total SAT test scores than non-regionalized districts;
2. Schools representing a larger student population will result in lower per pupil spending than schools representing a larger population;
3. Regionalization of school districts will result in larger student to teacher ratios than non-regionalized school districts;
4. School districts with a larger student population will also represent a higher total SAT score than school districts representing a smaller population;
5. School Districts in Worcester County that represented a smaller student population would also represent a higher graduation rate; and
6. Housing values in districts containing regionalized schools will be greater than housing values in non-regionalized districts.

After these hypotheses were tested, interviews were conducted with school administrators and committee members to determine the fiscal constraints as well as advantages of consolidation.

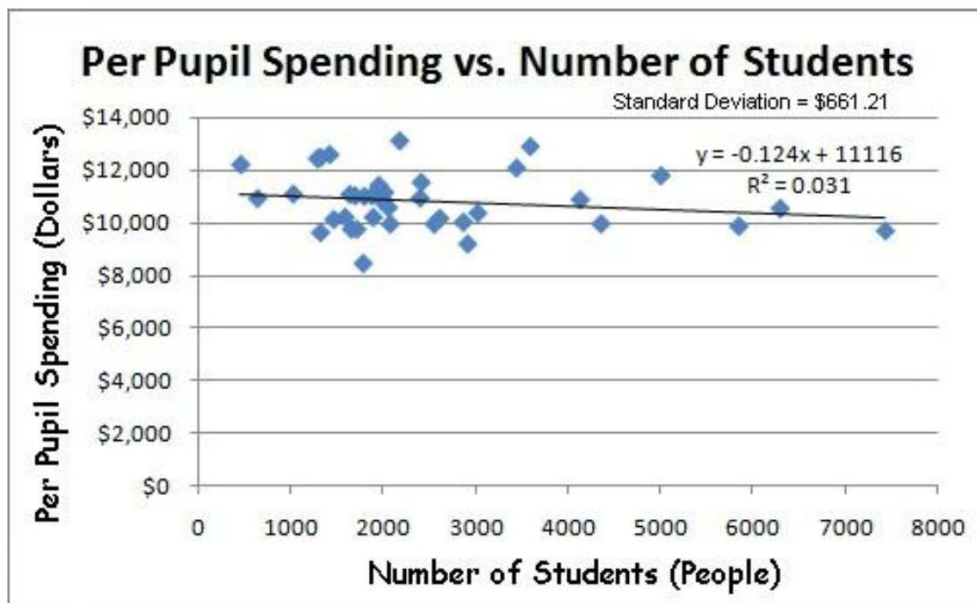
“Regionalized school districts will have higher total SAT test scores than non-regionalized districts”

SAT scores were collected and analyzed. WPI found that, “regionalized school districts have an average total SAT score of 1536.6 while non-regionalized school districts have an average total SAT score of 1504.7.” The authors then evaluated the standard deviation in test scores and determined that it was statistically insignificant, “the difference of 31.9 points in average total SAT scores was less than one third of a standard deviation. This difference was not great enough to be statistically significant.” The hypothesis was rejected. Berlin and Boylston hypothesis summary: Whether or not regionalization takes place, students’ SAT scores will not change.

“Schools representing a larger student population will result in lower per pupil spending than schools representing a larger population”

WPI compared per pupil spending with the number of students in a district. Very little correlation was found, “only 3.1 percent of the variation in per pupil spending was explained by the variation in numbers of students.” A plot of the data used is shown below:

Figure 2: Per Pupil Spending vs. Number of Students Plot



(Source: WPI)

Since there was such little correlation between per pupil spending and the number of students in a district, the second hypothesis was also rejected. Hypothesis summary for Berlin and Boylston: The cost per student will be the same whether or not regionalization takes effect.

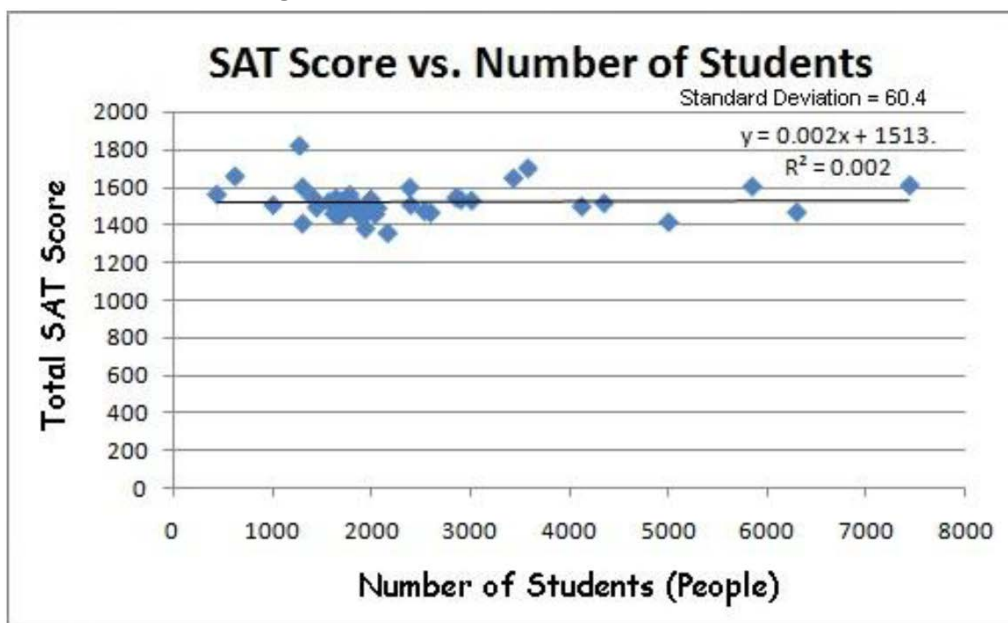
“Regionalization of school districts will result in larger student to teacher ratios than non-regionalized school districts”

WPI looked at average student-teacher ratios for non-regionalized schools compared to regionalized schools. The authors found that, “non-regionalized school districts in Worcester County had an average student-teacher ratio of about 14.52, while regionalized school districts in Worcester County had an average student-teacher ratio of 13.9.” Regionalized schools in Worcester County have lower student-to teacher ratios, albeit slightly. This hypothesis was also rejected. Hypothesis summary for Berlin and Boylston: The student-teacher ratio might be reduced, and if it does not become reduced, it would not increase because of regionalization.

“School districts with a larger student population will also represent a higher total SAT score than school districts representing a smaller population”

WPI took the total number of students in Worcester County school districts and plotted it against total SAT scores in those same districts. The authors found that, “only 0.2 percent of the variation in average total SAT score is explained by the variation in number of students.” The plot that the authors included in their study is shown below:

Figure 3: SAT Score vs. Number of Students



(Source: WPI)

Since there was minimal correlation between SAT test scores and the number of students in a district, the authors rejected this hypothesis as well. Hypothesis summary for Berlin and Boylston: Regionalization will not increase in total SAT scores.

“School Districts in Worcester County that represented a smaller student population would also represent a higher graduation rate”

WPI used a statistical measure known as, “R-squared.” WPI found that the R-squared value between graduation rate and student population size was .002, where 0% indicates that the model explains none of the variability of the response data around its mean. Because of this, the authors rejected the hypothesis. Hypothesis summary for Berlin and Boylston: Regionalization will not improve or detract from graduation rates.

“Housing values in districts containing regionalized schools will be greater than housing values in non-regionalized districts”

The authors replicated a study conducted in New York comparing housing values of consolidated and non-consolidated districts. WPI found that, “regionalized school districts in Worcester County had a greater average median housing value than non-regionalized school districts in Worcester County.” However, “the difference in housing values in these two types of districts was about an eighth of the average standard deviation.” In other words, the difference was not great enough to be considered significant. The authors rejected this last hypothesis as well. Hypothesis summary for Berlin and Boylston: Housing values will not change whether or not regionalization takes effect.

This report is of great value to Berlin and Boylston. First, this study is a cost-benefit analysis, using numerical data to derive statistical results and make conclusions based on facts. Second, this study focused on Worcester County, where Berlin and Boylston are located. Third, this study addressed some perceptions that have been brought up by stakeholders in Berlin and Boylston, such as a fear of home values decreasing, and higher student to teacher ratios.

Regional Planning Study Results, 2010

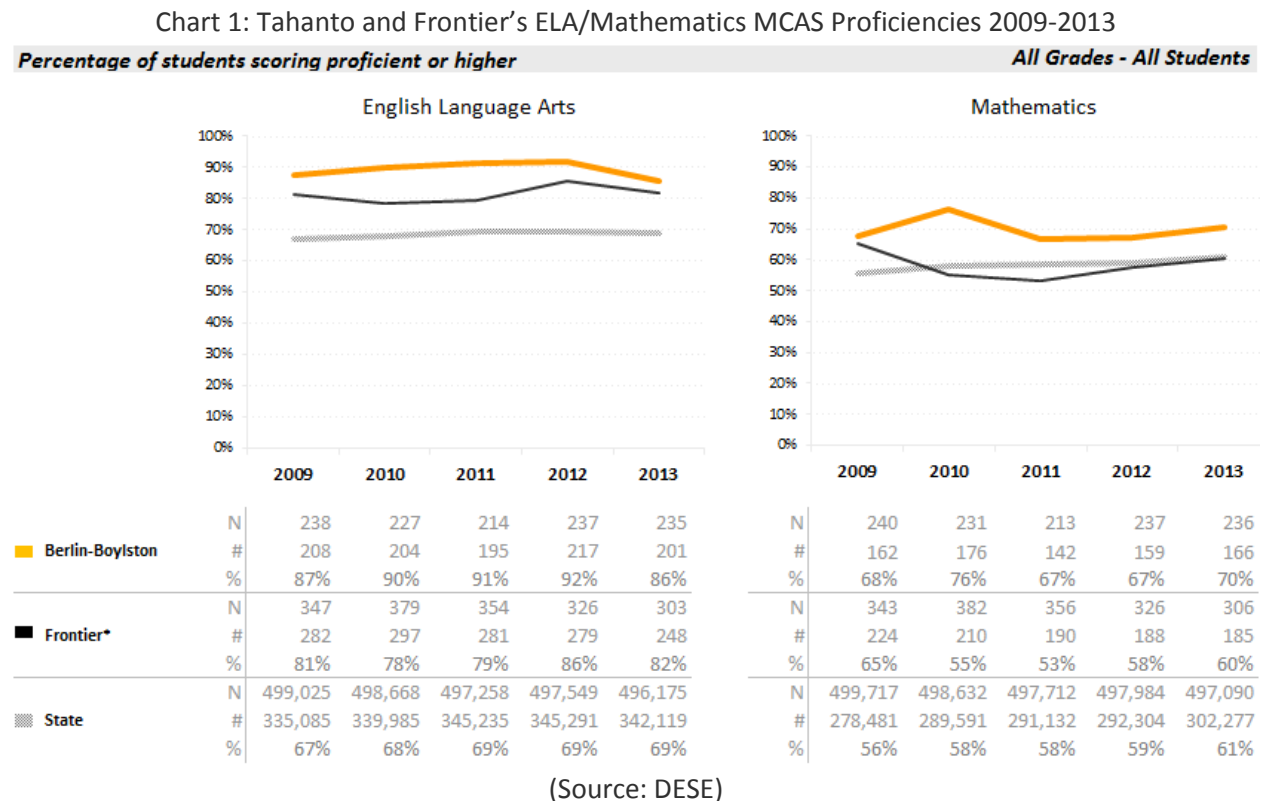
A 2010 study by the DESE titled, “Regional Planning Study Results,” covers a number of school regionalization case studies for each type of regional school district in MA. The two case studies that are relevant for Berlin and Boylston are the Freetown-Lakeville case study and the Frontier case study. Both of these case studies address K-12 Superintendency Unions, similar to Berlin and Boylston.

Freetown-Lakeville hired a consulting firm to study the pros and cons of consolidating into a PreK-12 Regional School District. Similar to Berlin and Boylston, Freetown and Lakeville already shared central office staff. Because of this, it was determined that no significant administrative savings would be seen. However, the consultants did estimate that if duplicative functions were eliminated, “the superintendent and the three district level administrators would have 30% more time to spend on supervision, evaluation, and planning activities relative to the mission, educational programs, and efficiency of the district (Lynch, 2010).”

In the next K-12 Superintendency Union case study, Frontier, a secondary regional district comprised of four towns received a planning grant to consider K-12 regionalization. The study found that regionalization would cost the member towns \$444,244 if salaries and benefits were increased to the highest member district level. Berlin, Boylston and Tahanto have a similar situation, with Berlin’s Teachers’ Salary schedule approximately 7% higher than Boylston’s, and on average 4% higher than Tahanto’s. Ultimately, Frontier’s planning committee was unable to stand behind regionalization

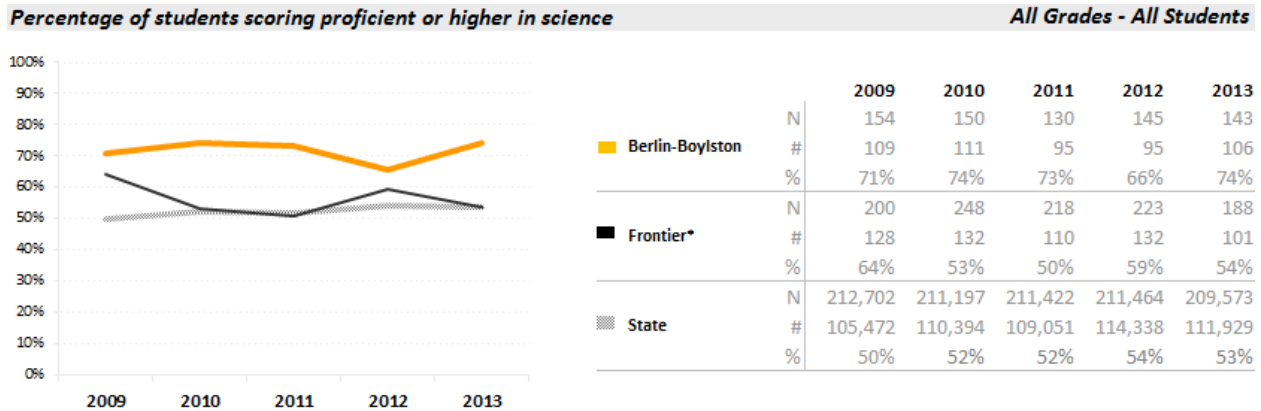
without a stronger sense of educational benefit and/or cost savings. Also, Frontier consisted of high performing districts, so expanded regionalization was not seen as an important motivating factor. The most significant impact of regionalization for Frontier would have been the streamlining of administrative tasks and the improvement of instruction and planning.

This case study is of particular importance to Berlin and Boylston because according to the DESE's DART, Frontier is comparable to Tahanto. Reviewing Frontier's MCAS scores against Tahanto's will provide another perspective at the conclusions of this case study.



Tahanto has been performing higher than Frontier, and Frontier scored below the State average between 2010 and 2013.

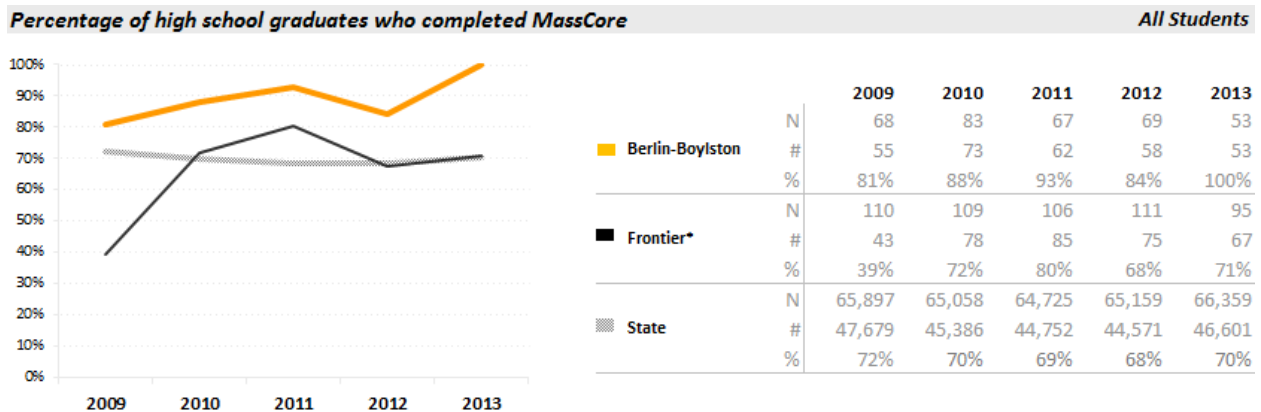
Chart 2: Tahanto and Frontier's Science MCAS Proficiencies 2009-2013



(Source: DESE)

Tahanto also performed higher than Frontier in Science for the past five years, and Frontier performed lower than the State average in 2011.

Chart 3: Frontier and Tahanto's MassCore Completion Rates



(Source: DESE)

One final table to indicate the performance rates between Tahanto and Frontier is the percentage of high school graduates who completed MassCore: Tahanto had much higher percentages than Frontier.

The graphs indicate Tahanto is performing quite well in comparison to Frontier, a district that was considered to be "high performing" in 2010 by the Frontier Regionalization Planning Committee. The argument could be made that if student performance was not a concern for Frontier in their decision to regionalize or not, Tahanto's decision to regionalize should not take into account student performance because it is already so much higher than Frontier's. However, the Frontier Regionalization Planning Committee was facing an increase of \$444,244 for salaries and benefits. Although it is true that there are costs associated with raising Berlin and Boylston's teachers to a single salary schedule (approximately \$160,000), the costs are offset by State incentives and the savings incurred from all district staff joining the current Berlin Boylston Regional health insurance plan. Seeing as Berlin, Boylston and Tahanto would save money due to regionalizing, (approximately \$58,389), the educational benefits become an added bonus.

The report concluded the pros and cons of regionalizing are different for every school district and that most of what this research determined has been observed in the past. Associated costs and educational benefits of regionalizing were the primary considerations and vastly different results came from different case studies. Districts that looked into educational issues as part of their study consistently reported that they, “envisioned educational improvements in a regionalized situation (Lynch, 2010).” Districts that did not specifically look at educational pros and cons but instead looked at the costs found that, “the educational advantages would not outweigh the additional financial investment (Lynch, 2010).” This result is important to consider because when studied, the educational benefits of regionalizing outweighed the additional costs. However, when educational advantages were not considered, and only additional costs were looked into, improvement on education did not seem enough to justify the costs.

Local control issues were also seen in the case studies to hinder regionalization efforts. The towns that were concerned they would have little voice in regional deliberations proposed electing school committee members by at large elections, “this method satisfies the one person one vote requirement, but provides all residents in all towns with an equal opportunity to vote for all members of the school committee (Lynch, 2010).”

Forming a Regional School Committee

Christine Lynch, Governance and Facilities Program Manager from DESE provided information for the formation of elected regional school committees: Elected regional school committees must comply with the one person one vote provision of the U.S. Constitution. The options for meeting this provision are outlined in Chapter 71, Section 14E as follows:

1. Elect committee members by voters in member communities with each community’s representation apportioned according to population;
2. Elect members in district-wide elections to be held at the biennial state elections;
3. Elect members with residency requirements in district wide elections to be held at the biennial state elections;
4. Weigh the votes of committee members according to the population they represent; or
5. Appoint members by locally elected officials such as school board members.

The one person one vote principal applies to all elected school committee members. When the school committee members are elected, the members must be representative of the population; the population referenced is the town’s total population, not the student population. When an agreement is submitted for DESE review, the legal office takes note of the method of selecting the school committee to ensure that the one person one vote principal is met.

The DESE’s Regional Planning Study Results report stated that local control issues were a common concern for Towns that were looking to regionalize their schools. This study found that the towns that were concerned they would have little voice in regional deliberations proposed electing school committee members by at large elections, “this method satisfies the one person one vote requirement,

but provides all residents in all towns with an equal opportunity to vote for all members of the school committee (Lynch, 2010).” At large elections are #2 and #3 in the aforementioned law.

As a reference, Tahanto’s school committee currently uses the appointed method (#5); the school committee of each of the elementary schools appoints three of its members to serve on the regional school committee. If Berlin and Boylston decide to regionalize completely, the district agreement must address how the school committee will be selected as well as the size of the committee. Christine Lynch provided some insight for the aforementioned methods in forming a new regional school district,

“If weighted voting is chosen (#4, above), it is possible for Berlin and Boylston to continue to have 3 members each on the regional district school committee. Based on Berlin and Boylston’s population figures, each Berlin representative would have approximately 2/3 of a vote while each Boylston representative would have one vote. Although the number of representatives from each town is not the same, this is the method used by Acton-Boxboro. If the school committee is elected (#1 above), the same general proportion would apply, if there are district wide elections (#2 and #3, used by Lincoln-Sudbury and Spencer-East Brookfield) the elected representatives need not be proportional to the population served as all voters from each town have an equal right to vote for the candidate(s) of their choosing.”

Mrs. Lynch proceeded to recommend that since there are multiple options and nuances to these calculations, that the district planning committee/officials decide the size of the new school committee and then decide what method might serve each community’s needs the most. As a reminder, Mrs. Lynch concluded by saying that all agreements and amendments must be approved by the Commissioner of Elementary and Secondary Education after review by DESE staff, and that DESE review consists of making sure the language of the agreement meets the provisions of the one person one vote mandate.

For reference, the composition of various regional school committees is included in Table 24 below.

Table 14: Regional School Committee Member Numbers

School			Town	2010 Census	Percent of Population	School Committee Members
Acton-Boxborough Regional High School		High	Acton	21,924	81.4%	7
			Boxborough	4,996	18.6%	4
Spencer-East School District	Brookfield	Regional	Spencer	11,688	84.3%	5
			East Brookfield	2,183	15.7%	2
Lincoln-Sudbury Regional High School			Lincoln	6,362	26.5%	2
			Sudbury	17,659	73.5%	4
Quaboag Regional High School			Warren	5,135	58.1%	6
			West Brookfield	3,701	41.9%	6
Mendon-Upton Regional School District			Mendon	5,839	43.6%	3
			Upton	7,542	56.4	3

(Source: CMRPC)

For those districts that were concerned about elementary education and the coordination of curriculums, assigning a curriculum director or expanding school councils were seen as reasonable solutions. This article's conclusion also cleared up a common misperception about regionalization and closing school buildings, "Combining school districts does not require combining school buildings, and a larger school district is not synonymous with a larger school building (Lynch, 2010)." Clarifying this misperception is important to include because it was repeatedly expressed in April of this year, shortly after this feasibility study began.

A list of advantages and challenges for regionalization was included at the end of this report in an appendix. This list is as follows:

Advantages of a K-12 Unified School District:

- A single school committee with cohesive educational policy for all K-12 students;
- A single administration with potential for more efficient and economical operation of school departments;
- A coordinated curriculum, kindergarten through grade twelve;
- A single salary schedule and a single teacher unit for negotiation purposes;
- A single budget, administered to take advantage of efficient, centralized purchasing techniques and coordinated transportation;
- Expansion of critical mass to gain economies of scale and aggregated purchasing power of goods and services;

- Fuller utilization of teachers and all school facilities;
- Opportunity for more administrative capacity at the district and school level;
- Opportunity to redirect leadership time and energy to educational programs through a reduction of duplicative effort in business procedures, reporting and negotiations;
- Opportunity to offer more programs and enrichment within school curriculum;
- Opportunity to expand athletic programs and extracurricular activities;
- Coordinated program of testing, guidance, health services and school adjustment work; and
- Expanded offerings could lead to decrease student loss under school choice.

Challenges facing Regionalization Efforts:

- Local Control and community distinctiveness:
 - Unwillingness to share control with neighboring towns;
 - A feeling of loss of local pride;
 - Loss of positions for local school committee members;
 - Potential change in administrative leadership and staff;
 - Loss of town control of state aid when funds are distributed directly to the regional district;
 - Loss of direct budget control and control of school buildings;
 - Potential for closing town school buildings; and
 - Concern for job security.
- Economic, Educational and/or Social Differences:
 - Wealthy districts object to joining with poorer district for fear of having to pay an undue share of the costs of the new district;
 - Poorer districts may fear increased tax to meet higher standards;
 - Loss of focus on elementary education;
 - Differences in financial support of education;
 - Differences in educational goals and objectives; and
 - Real or perceived social differences.
- Resistance to any change/misconceptions:
 - Fear that buildings will close – loss of local identity;
 - Fear that elementary students will be transported across town lines with longer bus rides;
 - Refusal to recognize the shortcomings of the small school district;
 - Belief that smaller is better with more individualize attention to students;
 - Belief that town is doing its best for students and joint district is too far removed from understanding of town desires;
 - Interchangeable use of terms small school districts and small schools;
 - Fear there will be more state control;
 - Fear there will be more bureaucracy in a larger regional administration; and
 - Fear there will be larger schools and class sizes.
- Financial:

- Belief that more state aid, a change in the state aid formula or a reduction of state and/or federal mandates will resolve existing challenges and allow existing districts to remain independent;
- Unwillingness to share budget control over educational spending;
- Absorption of town related services and costs into regional budget;
- Potential increased costs:
 - Requirement to hire a regional treasurer;
 - Additional costs to coordinate technology, align curriculum and school schedules, negotiate and combine contracts and leases, etc.;
 - New Collective Bargaining agreements that often result in an increase in salaries to the level of the highest district member;
 - The impact on other employment benefits and tenure;
 - Legal costs to develop agreement and negotiate contracts; and
 - Cost of buy-in: Small towns interested in joining an existing regional district or merging with another district often must pay a capital charge for the use of an existing school building.
- Loss of state construction aid if closing a school building recently constructed or renovated with state funds;
- Credibility of the state: Lack of trust in continued stated reimbursement promised to regions, e.g. decrease in state transportation aid; and
- Changes in operational assessment methodology under the educational reform law where towns must pay according to ability based on state formula not on a per pupil basis as had been the case in regional districts.

Regionalization: Case Studies of Success and Failure in Massachusetts

The last article included in this literature review is a Pioneer Institute White Paper called, “Regionalization: Case Studies of Success and Failure in Massachusetts” from October of 2008. Section VII from this article, “The Education Cooperative: Taking Collaboration to the Next Level,” explains how The Education Cooperative (TEC) in Dedham, MA and other regional education collaboratives in the State help local schools save money by providing: services for students with special needs; broader academic opportunities; and ways to improve professional development for education-related jobs.

With the passing of, “An Act Further Regulating Programs For Children Requiring Special Education and Providing Reimbursement” in 1972, schools were mandated to provide free, appropriate education to all children with special needs, in the least restrictive environment, regardless of their disability. Schools quickly realized that serving special needs students can incur quite a cost; requiring additional teachers, part-time aides, health insurance and sometimes nursing services. Educational collaboratives helped local schools save money by regionalizing these services. Schools now have the option to tuition out their special needs students at a greatly reduced price. Dr. Sandra Einsel, director of pupil services for Walpole Public Schools, estimates that the tuition for TEC is about half what it would be for Walpole to build an in-house program for these students. Dr. Einsel summarized her opinion on education

collaboratives when she said, “When you have just a handful of children with a variety of different needs, it makes sense to access your collaborative (Pioneer Institute, 2008).”

Soon, education collaboratives took on other services such as vocational education and low-incidence regular education programs. They also helped schools obtain greater purchasing power for supplies. TEC fully engages this service and now offers collective bidding on: paper, office, classroom, art and computer supplies; cafeteria supplies; athletic equipment and supplies; custodial supplies; fuel oil; and natural gas. TEC’s Executive Director John Connolly says, “TEC’s purchasing power gets collaborative members discounts of up to 70 percent off of catalogue prices for paper and office supplies, and the program collectively saves school districts millions of dollars (Pioneer Institute, 2008).” Norwood Schools Superintendent Edward Quigley stated that his district has consistently used TEC’s cooperative purchasing program and the pricing has always come out ahead of the State’s bid list.

TEC hasn’t stopped there, however, as they now offer “job-alike” programs for superintendents, principals, specialty teachers, food service managers, and financial administrators. These job-alike programs provide forums to, “share challenges and experiences with their regional peers,” and it has been met with great success. Even with 37 years of education experience, Dr. John D’Auria from Canton says TEC’s job-alike program has made a significant difference, “From a personal perspective, it ties me together with other area superintendents to share ideas around education and finance. It’s been pretty substantial for me so far (Pioneer Institute, 2008).” This job-alike program not only helps people improve upon their professional performance but helps people transition jobs as well.

In addition to these services, TEC’s Executive Director John Connolly says that the current menu of TEC’s services is only the beginning, “The beauty of a collaborative is that no idea is a bad idea. If two or more districts need something, we can do it for them (Pioneer Institute, 2008).”

This article is relevant to our feasibility study because it shows how school district regionalization is not the only option for Berlin and Boylston to obtain greater purchasing power, increase course offerings, or improve professional development. It is important to note that Berlin , Boylston and Tahanto are members of the Assabet Valley Collaborative in Marlborough, MA.

The DESE offers information on education collaboratives on their website. They begin by summarizing educational collaboratives,

“Educational Collaboratives are formed by local school committees and charter boards under the provisions of Chapter 40, Section 4E. The purpose of an educational collaborative is to supplement and strengthen the programs and services of member school committees and charter boards. All educational collaborative agreements and amendments must be approved by the member school committees and charter boards and the Board of Elementary and Secondary Education.”

Other information such as the history of collaboratives, laws and regulations, the process for forming or amending an educational collaborative, and more, can be found on the DESE’s website: (<http://www.doe.mass.edu/finance/collaboratives/>).

Community Survey Perspectives

In April of this year, CMRPC conducted a survey asking Berlin and Boylston stakeholders to provide their perspectives on a numbers of questions regarding the proposed comprehensive regional school district. We received 261 responses to the survey. Respondents included: Residents from Berlin or Boylston; Parents, Teachers, Staff, or School Committee Members from Berlin Memorial, Boylston Elementary, and Tahanto Regional; Employees of Municipal Departments in Berlin or Boylston, as well as people who specified another specific relationship toward these Towns or Schools. Some survey participants may have fallen into multiple categories:

- 115 were residents of Boylston (44% of total respondents)
- 77 were residents of Berlin (29.5%)
- 78 respondents were parents of a student at Tahanto Regional (29.9%)
- 58 were a parent of a student at Boylston Elementary (22.2%)
- 46 were a parent of a student at Berlin Memorial (17.6%)

Collectively investigating the responses of the open ended questions allowed CMRPC to categorize responses for each question, leading to an understanding of how stakeholders felt about K-12 school district regionalization. Many of the responses mirrored the motivating factors and barriers to regionalization found in the DESE's "Opportunities and Obstacles" article, the commonly held beliefs (hypotheses) about regionalization studied in WPI's cost-benefit analysis, and the advantages and challenges recognized in the DESE's "Regional Planning Study Results" article. The most common responses are listed below for each question.

"What do you hope the community members and student body of Berlin and Boylston would gain from regionalizing K-12?"

- A coordinated curriculum (68 respondents out of 178, 38.2%)
- An efficient administration (46 respondents, 25.84%)
- Less cost (41 respondents, 23.03%)
- Other common responses included: better education and/or teachers; increased course offerings; and increased group purchasing power.

The most common comments in this question were also listed as primary motivating factors for regionalization by the DESE in their Opportunities and Obstacles article. The notions have been found to be well-grounded. Regionalization can improve the curriculum of school districts through an efficient and effective administration that can focus on teacher evaluations and classroom lesson learning. Administrative efficiencies also lead to cost savings, and in conjunction with State incentives and the potential of increased group purchasing power, regionalization helps support professional development for teachers and/or the designation of a curriculum director.

"What are the fears you have about regionalizing?"

- No fears (51 respondents, 27.27% of a total 187 who answered the question)

- School district staff benefits and pay would change (35 respondents, 18.72%)
- Loss of local control (25 respondents, 13.37%)
- Other common fears included: disproportional monetary support by either town; large class sizes; and long transportation times

Loss of local control has historically and characteristically been a barrier to regionalization. Again, the DESE lists it within their Opportunities and Obstacles article, and writes that there have been efforts to reduce the loss of local control within recent regionalization initiatives. Particular language within regional agreements can ensure that elementary schools remain open in each member town, and that towns contribute separately to elementary schools within a regional district. Another approach to retaining aspects of local control was included in the recent Ralph Mahar study, where member towns are encouraged to seek legislation to create more powers for school councils in regional districts or provide more autonomy to individual schools while remaining under the regional district's authority.

Some respondents were concerned with potential larger student to teacher ratios. This is a commonly held belief among towns and districts looking to regionalize. However, it was disproven by WPI in their 2010 cost-benefit analysis mentioned earlier in this study. Actually, regionalized schools were found to have lower student to teacher ratios, but the difference was so slight that WPI rejected the notion completely.

“What is absolutely necessary for you to support regionalization?”

- Lower taxes or saving money (32 respondents out of 165, 19.39%)
- Better education (27 respondents, 16.36%)
- Other necessities voiced through this question included: having same teacher pay and benefits; increased course offerings; having a good regionalization implementation plan; having equal town representation; job security; and keeping seniority for teachers currently at the schools

“What would make it absolutely impossible for you to support regionalization?”

- Increased taxes (22 out of 147 respondents, 14.97%)
- Other common responses included: bigger classes; job loss; loss of benefits/pay; or loss of quality teachers

“What factors are most important when making the decision to regionalize or not?”

- Impact to students and teachers matters most (51 respondents out of 147, 34.69%)
- Finances (48 respondents, 32.65%)
- Other important factors to consider included: education; obtaining a streamlined administration; implementation plan; reduced taxes; and having the same teacher salary/benefits

“What factors do you think are important to take into consideration when making this decision?”

- Impact on students and teachers (51 respondents out of 147, 34.69%)
- Finances (47 respondents, 31.97%)
- Other important factors to consider included: reduce taxes; hearing everyone's voice; same teacher salary/pay; implementation/logistic; increased educational offerings; and town equality

“What factors do you think are important to take into consideration when making this decision?”

- 91 varied responses, included: providing clear and concise information, declining property values; no change – happy with current school organization

The final comment elaborated upon in this survey review and analysis is the notion that regionalization would reduce property values in member towns. This notion has been considered and commonly believed by stakeholders in towns that are considering regionalization; however, it was disproved by WPI in their cost-benefit analysis. Specifically, the belief that the WPI team came across was that: Housing values in districts containing regionalized schools will be greater than housing values in non-regionalized districts. The WPI team replicated a study conducted in New York comparing housing values of consolidated and non-consolidated districts. WPI found that housing values were actually higher in districts with regionalized schools, however, the difference was statistically insignificant and the hypothesis was altogether rejected.

Academic Conditions

District Analysis Review Tool (DART) Data

DART Overview

The Department of Elementary and Secondary Education (DESE) provides a wealth of information on each school district in Massachusetts. Their “School and District Profiles” contain: student enrollment numbers; gender and demographic information; teacher’s ages, races, and salaries compared to the State average, as well as student to teacher ratios; finance data; student assessment data (MA Comprehensive Assessment System (MCAS) scores); and a District Analysis Review Tool (DART). This tool includes most of the information listed before it and provides tables and charts for easy comparisons between districts and comparisons over time. The different groups of data that the DART contains can be found on the DESE’s websites in various excel sheets. The purpose of this section is to review DART information and consider whether or not Berlin Memorial, Boylston Elementary, and Tahanto Regional are performing well compared to similar schools in MA.

Within the following tables are many abbreviations, including: SWD (students with disabilities); ELL (English language learners); and ELA (English/Language Arts). Two abbreviations that will need more description though, are “MCAS” or Massachusetts Comprehensive Assessment System, and “SGP” or Student Growth Percentiles. The MCAS is Massachusetts’ way of meeting the requirements of the Education Reform Law of 1993. This law requires that: all public school students be tested for

performance, including students with disabilities and English language learners; performance must be based on the MA Curriculum Framework learning standards; and that reports on individual students, schools, and districts must be compiled.

Student Growth Percentiles, which stem from the MCAS system, are the DESE's way of measuring students' performance over time. Definitively, SGPs are:

“a measure of student progress that compares changes in a student's MCAS scores to changes in MCAS scores of other students with similar scores in prior years. A SGP measures student progress by comparing one student's progress to the progress of other students with similar MCAS performance histories ("MCAS Student Growth Percentiles: Interpretive Guide", 2011).”

SGPs range from a score of 1 to 99, where higher numbers represent higher amounts of growth and vice versa. SGPs are independent of a student's MCAS scores; therefore, every student has a chance to attain growth at any of the 99 percentiles in the next year. Here, in our DART Overview tables, each school's SGPs are aggregated and a median SGP is displayed; this is the column on the right titled, “2013 MCAS Growth median SGP.” This SGP represents the “typical” growth for students in the district. Both the, “2013 MCAS % Proficient or Higher” and “2013 MCAS Growth median SGP” columns depict student performance and will be considered when comparing Berlin and Boylston's schools to other schools in MA. This data is pertinent to our feasibility study because student performance can be significantly impacted through regionalization.

Student performance can be improved through regionalization by first, coordinating curriculums to make sure all students are equally prepared for MCAS testing, and second, by streamlining administrative tasks to lead to more instructional supervision (as repetitive and extraneous tasks get reduced, administration has more time to spend evaluating teachers and improving teaching delivery).

Through the following tables we will begin to see how Berlin Memorial, Boylston Elementary, and Tahanto Regional are performing. If they are not performing well compared to commensurate schools, then regionalization may be considered a reasonable course of action.

DART uses grade span, student enrollment, and demographic data to generate a list schools that are comparable to the school you choose. All of the following tables were derived from the excel file, “DART for Districts” on the DESE's webpage: <http://www.doe.mass.edu/apa/dart/>.

Table 14: Berlin's DART Overview

*Districts most similar to your district in terms of grade span, total enrollment, and special populations.
 Orange-shaded row: Your district Blue-shaded row: Highest performing of the other 10 districts.

Comparable Districts Overview	Grade span	2013-14 October Enrollment				2013 MCAS % Proficient or Higher			2013 MCAS Growth median SGP	
		Total Enrollment	Low Income %	SWD %	ELL %	ELA	Math	Science	ELA	Math
Berlin*	PK - 05	204	6.9	25.5	2.0	60%	59%	54%	49.0	38.0
Boxborough*	PK - 06	428	4.7	16.1	2.8	88%	88%	74%	74.0	70.0
Boylston*	PK - 05	315	8.3	13.9	1.6	75%	78%	64%	58.5	71.5
Deerfield*	PK - 06	443	17.4	16.5	1.6	69%	62%	68%	51.0	42.0
Dover*	K - 05	504	1.8	14.6	1.6	84%	85%	84%	69.0	72.0
Eastham*	PK - 05	212	25.9	18.8	1.4	75%	68%	50%	62.0	55.0
Plympton*	K - 06	237	13.5	16.8	0.4	64%	69%	71%	48.5	41.5
Sherborn*	PK - 05	385	3.4	15.2	1.6	84%	85%	86%	54.0	64.0
Southampton*	PK - 06	550	15.6	16.3	2.0	68%	64%	68%	49.0	44.5
Westhampton*	PK - 06	148	12.2	23.0	1.4	76%	83%	86%	46.0	68.0
Williamsburg*	PK - 06	153	19.0	17.6	1.3	64%	51%	89%	45.0	49.0

(Source: DESE)

As highlighted in Table 14, comparable districts largely surpassed Berlin Memorial in 2013. Berlin ranked last in English/Language Arts (ELA) (11th), as depicted in the "2013 MCAS % Proficient or Higher" (Proficient or Higher) column. It ranked second to last in Math and Science (10th place each). For the "2013 MCAS Growth median SGP" (Growth median SGP) column, Berlin tied for 8th place in ELA and 11th place for Math. The results of this comparative analysis indicate that Berlin students are underperforming as compared to students in cohort districts.

Table 15: Boylston's DART Overview

Comparable Districts Overview	Grade span	2013-14 October Enrollment				2013 MCAS % Proficient or Higher			2013 MCAS Growth median SGP	
		Total Enrollment	Low Income %	SWD %	ELL %	ELA	Math	Science	ELA	Math
Berlin*	PK - 05	204	6.9	25.5	2.0	60%	59%	54%	49.0	38.0
Boxborough*	PK - 06	428	4.7	16.1	2.8	88%	88%	74%	74.0	70.0
Boylston*	PK - 05	315	8.3	13.9	1.6	75%	78%	64%	58.5	71.5
Conway*	PK - 06	172	18.0	14.5	0.6	67%	63%	68%	34.0	38.0
Deerfield*	PK - 06	443	17.4	16.5	1.6	69%	62%	68%	51.0	42.0
Dover*	K - 05	504	1.8	14.6	1.6	84%	85%	84%	69.0	72.0
Nahant*	PK - 06	180	9.4	8.3	0.0	75%	66%	60%	46.0	50.0
Rochester*	PK - 06	487	11.3	16.1	0.4	72%	68%	62%	58.0	58.0
Sherborn*	PK - 05	385	3.4	15.2	1.6	84%	85%	86%	54.0	64.0
Southampton*	PK - 06	550	15.6	16.3	2.0	68%	64%	68%	49.0	44.5
Williamstown*	PK - 06	439	13.4	12.0	1.4	80%	71%	67%	56.0	47.0

(Source: DESE)

Looking at Boylston Elementary's Proficient or Higher column, we find that Boylston ranked 5th in ELA, 3rd in Math, and 8th in Science. For Growth median SGPs, Boylston came in 7th for ELA and 3rd for Math. Not only does Boylston Elementary has a higher percentage of proficient or higher than Berlin Memorial, Boylston also has the same average as the collective eleven communities in ELA (75%), higher than average in Math (72%), and below the average in Science (69%).

Table 16: Tahanto's DART Overview

Comparable Districts Overview	Grade span	2013-14 October Enrollment				2013 MCAS % Proficient or Higher			2013 MCAS Growth median SGP	
		Total Enrollment	Low Income %	SWD %	ELL %	ELA	Math	Science	ELA	Math
Berlin-Boylston*	06 - 12	542	11.6	19.1	0.9	86%	70%	74%	52.5	54.0
Four Rivers Charter*	07 - 12	216	23.1	16.2	0.9	90%	73%	54%	56.0	53.5
Francis W. Parker Charter Essential*	07 - 12	399	4.0	18.5	0.0	90%	69%	66%	57.0	42.0
Frontier*	07 - 12	619	22.0	19.3	0.6	82%	60%	54%	44.0	46.0
Hampshire*	07 - 12	756	12.0	19.0	0.5	84%	64%	59%	57.0	53.0
Innovation Academy Charter*	05 - 12	726	12.5	18.7	1.5	76%	71%	50%	49.0	54.0
Mount Greylock*	07 - 12	581	18.4	11.0	0.9	93%	77%	51%	59.0	51.0
Mystic Valley Regional Charter*	K - 12	1,499	16.7	14.8	0.0	75%	73%	48%	56.0	60.0
North Central Charter Essential*	07 - 12	333	44.7	21.6	0.9	81%	64%	48%	69.0	65.5
Pioneer Valley Performing Arts Charter*	07 - 12	406	14.3	16.3	0.0	89%	52%	55%	40.5	41.0
Rising Tide Charter*	05 - 11	522	11.7	9.4	0.0	91%	72%	72%	58.0	43.0

(Source: DESE)

In Tahanto's Proficient or Higher column we see that Tahanto ranks 7th in both ELA and Math but 1st in Science. For Growth median SGPs, Tahanto ranks 8th in ELA and 4th in Math. Tahanto is above the average compared to students in cohort districts in each category of the collective eleven communities (ELA 85%, Math 68%, Science 57%).

Student Performance in Detail

The next section looks at student performance rates over time. DESE's DART includes graphs to comparing your school against another school of your choosing as well as against the State average. Included are Proficient or Higher graphs and Growth median SGP graphs for each educational subject (ELA, Math, and Science). In conjunction with the performance rates displayed in the previous tables, the proceeding graphs provide a quality perspective into how Berlin and Boylston's three school districts are performing. These graphs are significant because they indicate the capacity of the administration and staff to properly educate all of their school students. These graphs are also significant because they show student performance trends and can be relied on to depict the improvement or worsening of school district test results.

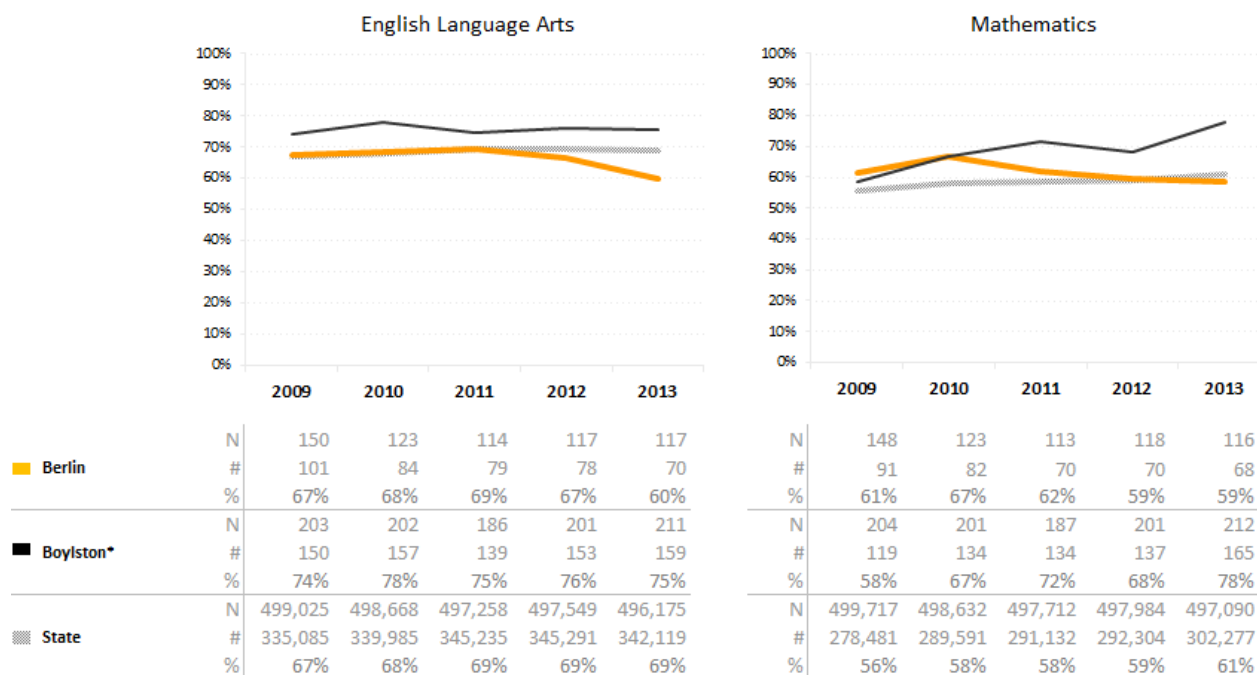
The first group of graphs compares student performance rates for Berlin, Boylston, and the State. The second group of charts compares Berlin and Boylston to a school from the DART's Overview table. As stated previously, the list of schools that the DART provides in its Overview table is based on grade span, total enrollment, and level of demographic populations (low income, students with disabilities (SWD), and English language learner (ELL)). For Berlin Memorial and Boylston Elementary, CMRPC chose Boxborough as a comparison because of Boxborough's close proximity and similar level of low income students. For Tahanto, CMRPC chose Hampshire as a comparison because of Hampshire's similar level of low income students. CMRPC chose to compare Berlin, Boylston and Tahanto against schools that have similar levels of low income students because of the relationship it has to a Town's level of wealth. All of the following graphs were derived from the excel file, "DART for Districts" on the DESE's webpage: <http://www.doe.mass.edu/apa/dart/>.

Berlin, Boylston, and the State

Chart 4: Berlin, Boylston, and the State's ELA and Math Performance Rates 2009-'13

Percentage of students scoring proficient or higher

All Grades - All Students

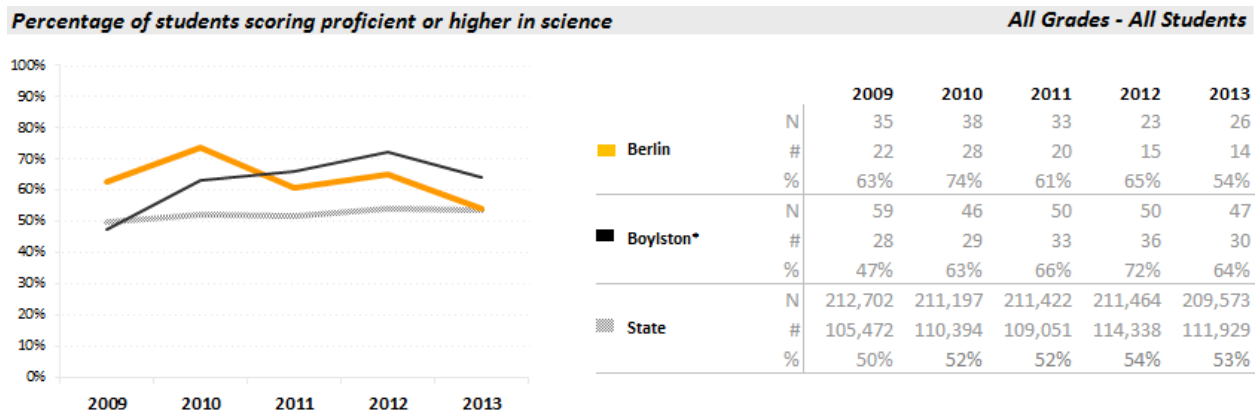


Compared to Berlin Memorial and the State average, Boylston Elementary had the most students performing proficient or higher in ELA from 2009-2013. Berlin was on par with the State average between 2009 and 2011 in ELA; however, in 2012, Berlin fell below the State average by two percentage points. Berlin currently has 9% less students performing at or above proficient in ELA than the State average.

For Mathematics, Boylston has had the most students performing proficient or higher since 2011. Berlin outperformed Boylston in 2009, and both Towns tied for performance in 2010, but since then Berlin has been performing below Boylston. Berlin's Mathematics performance rates were above the State average from 2009-2011; however, in 2013 Berlin had 2% less students performing proficient or higher in Math than the State average.

These first two graphs show how Berlin needs to improve its student performance in ELA and Math to keep up with the State average. These graphs also show how Boylston has been doing better than the State average over the past five years. In analyzing this, it is clear that Berlin would benefit the most from regionalization, and a curriculum similar to Boylston's.

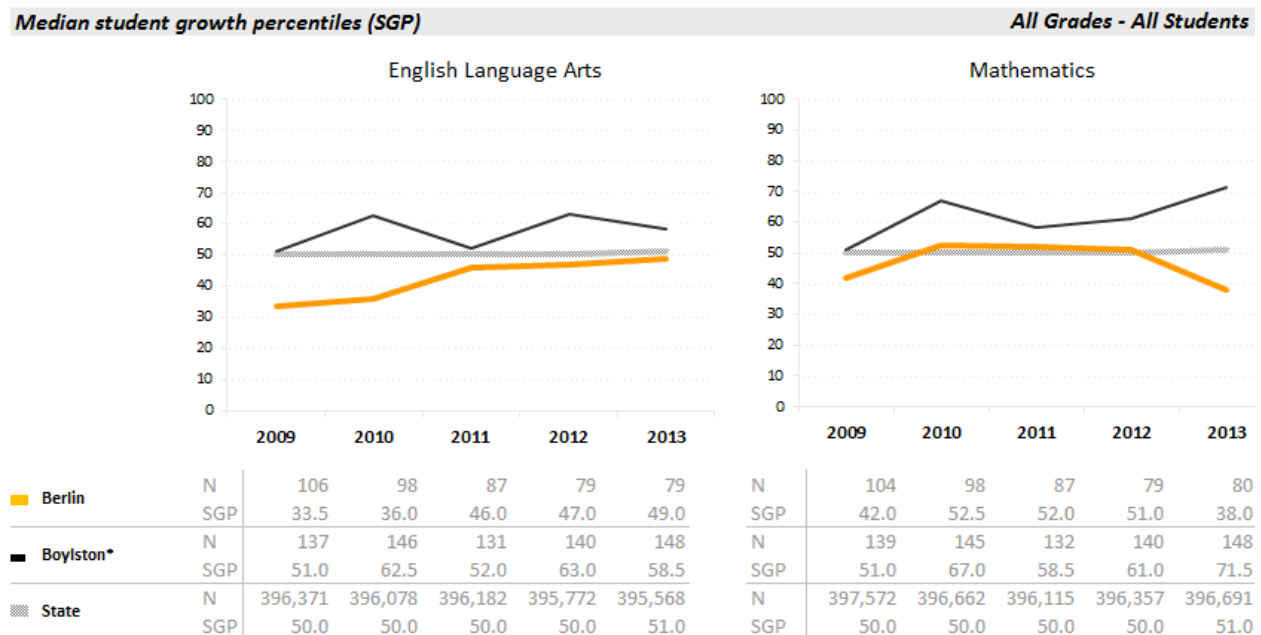
Chart 5: Berlin, Boylston, and the State's Science Performance Rates 2009-'13



(Source: DESE)

Boylston Elementary currently has 10% more students performing proficient or higher in Science than Berlin Memorial. Boylston's rates are also above the State average and have been for the past four years. Berlin has been doing better than the State in Science for the past five years, and Berlin outperformed Boylston in 2009 and 2010. This graph is particularly significant because it shows the importance of keeping student performance rates up over time. If current trends continue, Berlin Memorial may fall below the State average in a few years, and although Boylston Elementary was improving consistently from 2009-2012, the same could be true for Boylston. Regionalization, leading to a less burdened school administration and an improvement on instructional leadership, could provide the support needed for teachers to maintain their student's performance levels.

Chart 6: Berlin, Boylston, and the State's ELA and Math Median SGPs 2009-'13



(Source: DESE)

Boylston's median SGPs in ELA and Math have surpassed both Berlin Memorial's and the State's for the past five years. Berlin's median SGP in ELA has been lower than the State average for the past five years; however, their median SGP in Math was higher than the State's from 2010-2012. These graphs show that Berlin has been improving at much slower rates than Boylston and the State on average. These graphs also show that low student performance levels are not only a current problem for Berlin, but a problem of the recent past as well.

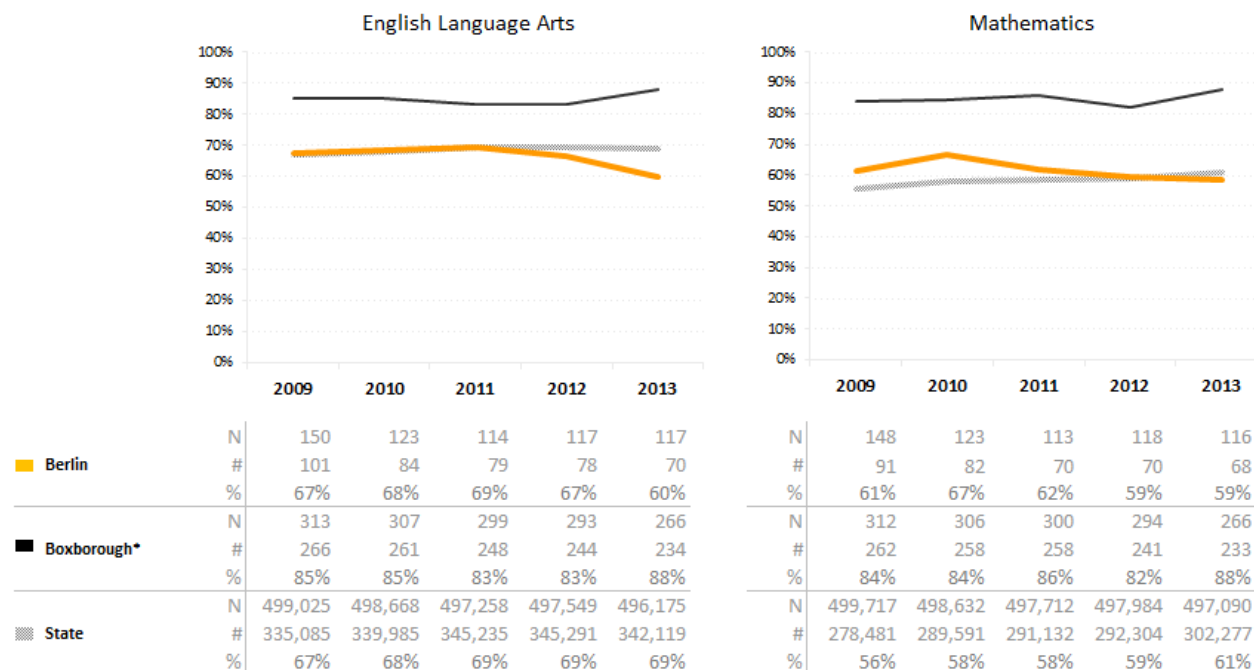
The next set of graphs will continue to determine how Berlin Memorial and Boylston Elementary are performing by comparing them to Boxborough's Elementary School. As stated before, the CMRPC chose Boxborough from the DART's list of comparable schools because it has a close geographic proximity and a similar level of low income students. First, Berlin will be compared to Boxborough and the State. Second, Boylston will be compared to Boxborough and the State. Comparisons between Boxborough and the State will also help determine how schools that are similar to Berlin and Boylston are performing compared to the State average.

Berlin, Boxborough, and the State

Chart 7: Berlin, Boxborough, and the State's ELA and Math Performance Rates 2009-'13

Percentage of students scoring proficient or higher

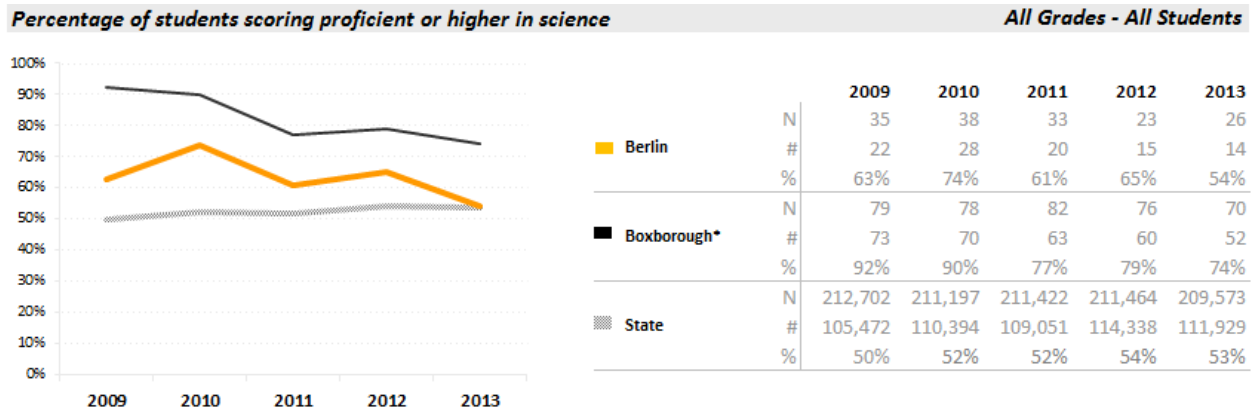
All Grades - All Students



(Source: DESE)

Boxborough has had substantially more students performing proficient or higher in ELA and Math than Berlin and the State for the past five years. These graphs show that Berlin could stand to improve not only compared to the State but to a comparably sized and demographically composed school district.

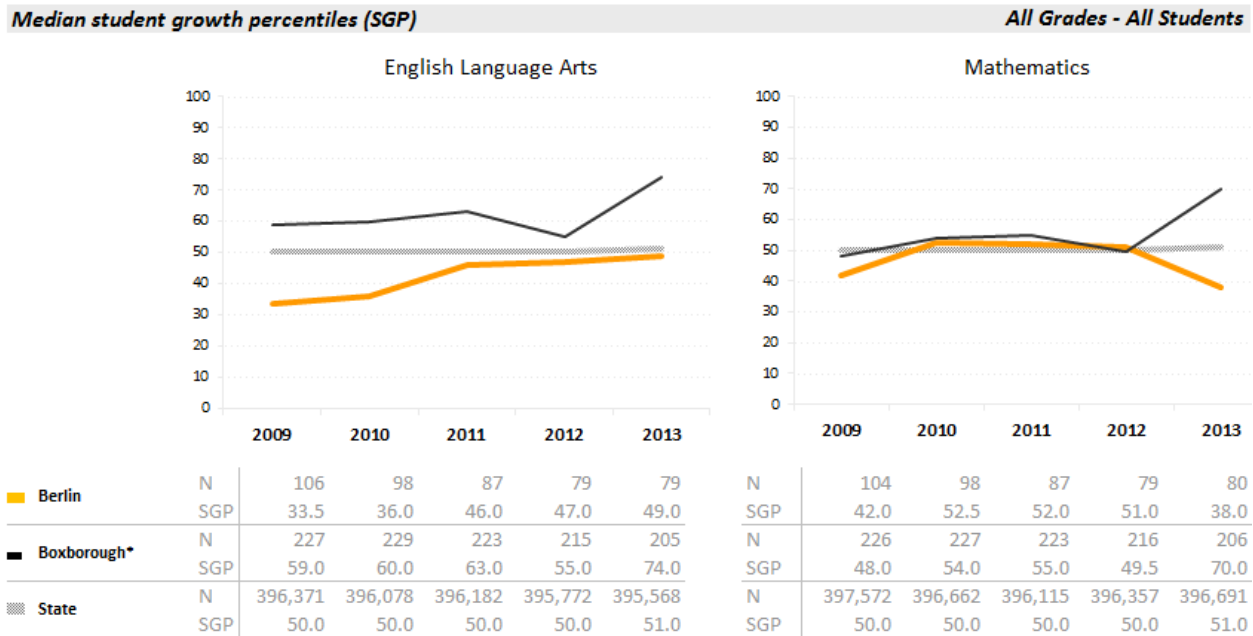
Chart 8: Berlin, Boxborough, and the State's Science Performance Rates 2009-'13



(Source: DESE)

Boxborough has had more students performing proficient or higher in Science than Berlin and the State average for the past five years. This graph shows that although Boxborough is outperforming Berlin in Science, both school's performances have been worsening over time.

Chart 9: Berlin, Boxborough, and the State's ELA and Math Median SGPs 2009-'13



(Source: DESE)

Boxborough has had higher median SGPs in ELA than Berlin and the State for the past five years. In Math, Boxborough's SGPs were higher than Berlin's in every year except 2012.

The past three Charts show that Berlin Memorial could stand to improve its student performance compared to a school with similar wealth, size, and demographic composition. The Administration has recently developed a literacy committee with teachers from all three districts, parents from both communities and administration. The committee identified gaps within the current ELA curriculum. The

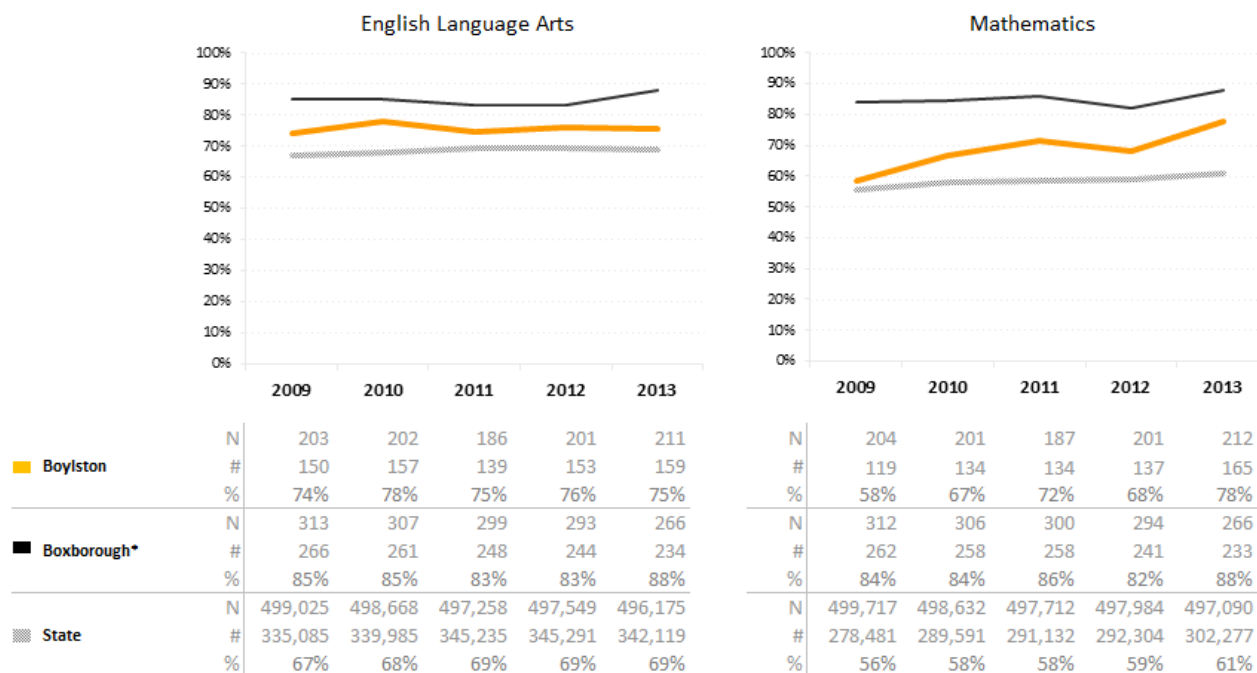
recommendation was to identify an appropriate core reading program, to begin this year to provide a rigorous literacy program for the students in grades K, 1 and 2. (FY15 Budget Hearings)

Boylston, Boxborough, and the State

Chart 10: Boylston, Boxborough and the State's ELA and Math Performance Rates 2009-'13

Percentage of students scoring proficient or higher

All Grades - All Students



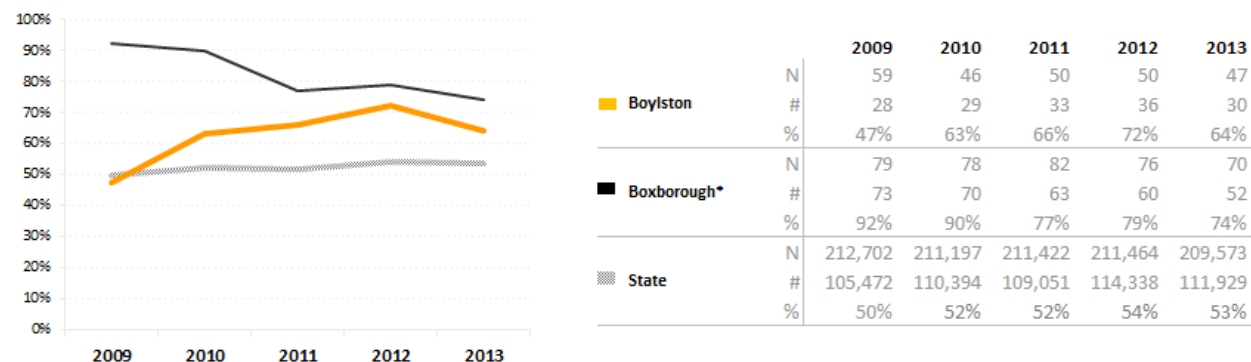
(Source: DESE)

Boxborough has been outperforming Boylston in ELA and Math for the past five years.

Chart 11: Boylston, Boxborough and the State's Science Performance Rates 2009-'13

Percentage of students scoring proficient or higher in science

All Grades - All Students

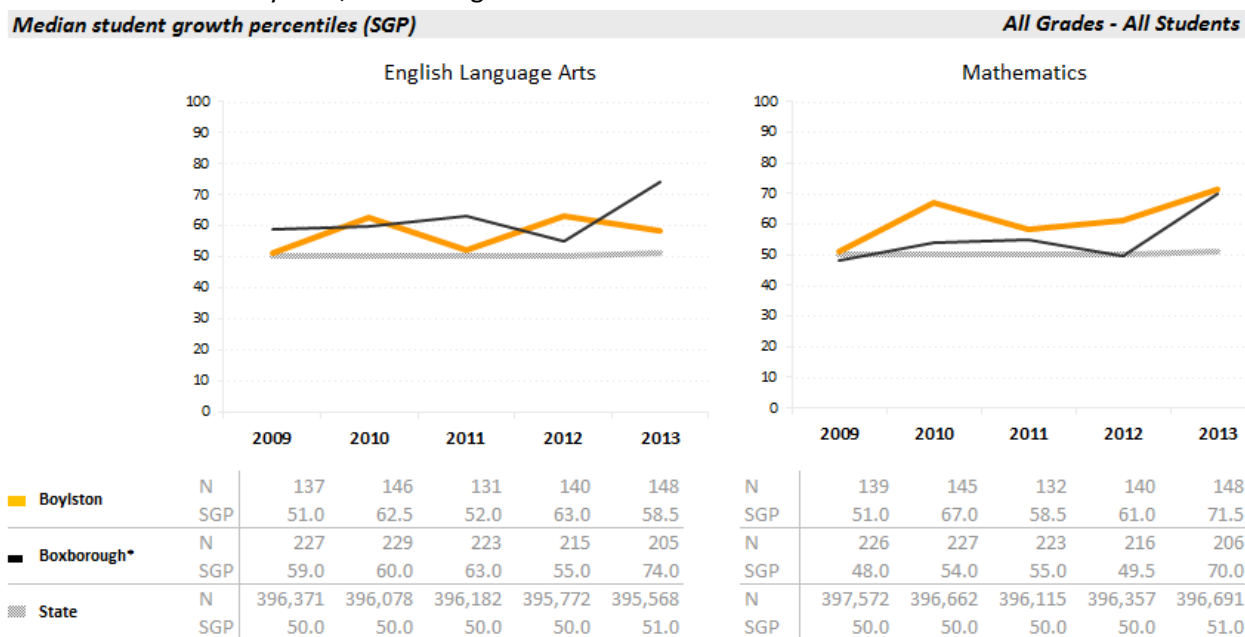


(Source: DESE)

Boxborough has been outperforming Boylston in Science for the past five years as well. These past two Charts show that Boylston Elementary, although outperforming Berlin in most years and subjects, is not the top performing school of similar size and demographic composition. Although this conclusion could

have been derived from Table's 7 and 8, Berlin and Boylston's DART Overviews, these past three graphs show that Boxborough has been outperforming Berlin and Boylston in the recent past as well.

Chart 12: Boylston, Boxborough and the State's ELA and Math median SGPs 2009-'13



(Source: DESE)

Boxborough's median SGPs in ELA are currently higher than Boylston's; however, the two schools have alternated highest median SGPs in ELA for the past four years. Boylston's median SGPs in Math have been higher than Boxborough's for the past five years. It's important to note how Boxborough's SGPs in Math were below the State's in 2009 and 2012; this is the first time that Boxborough's performance levels have been at or below the State average. These past few graphs have shown that Boylston's SGP levels are not far off from a comparable school. In this regard, we can say that Boylston is performing adequately for its size, wealth, and composition of demographic populations.

Recalling how Berlin compared to Boxborough, it is clear that Berlin could stand to benefit more from regionalization now and in the recent past as well. As Boylston's student performance levels were not quite as high as Boxborough's, it could be argued that Boylston could also stand to improve as well. Regionalization would allow for the creation of one district-wide curriculum, potentially averaging the student performance levels as students enter the Tahanto Middle School.

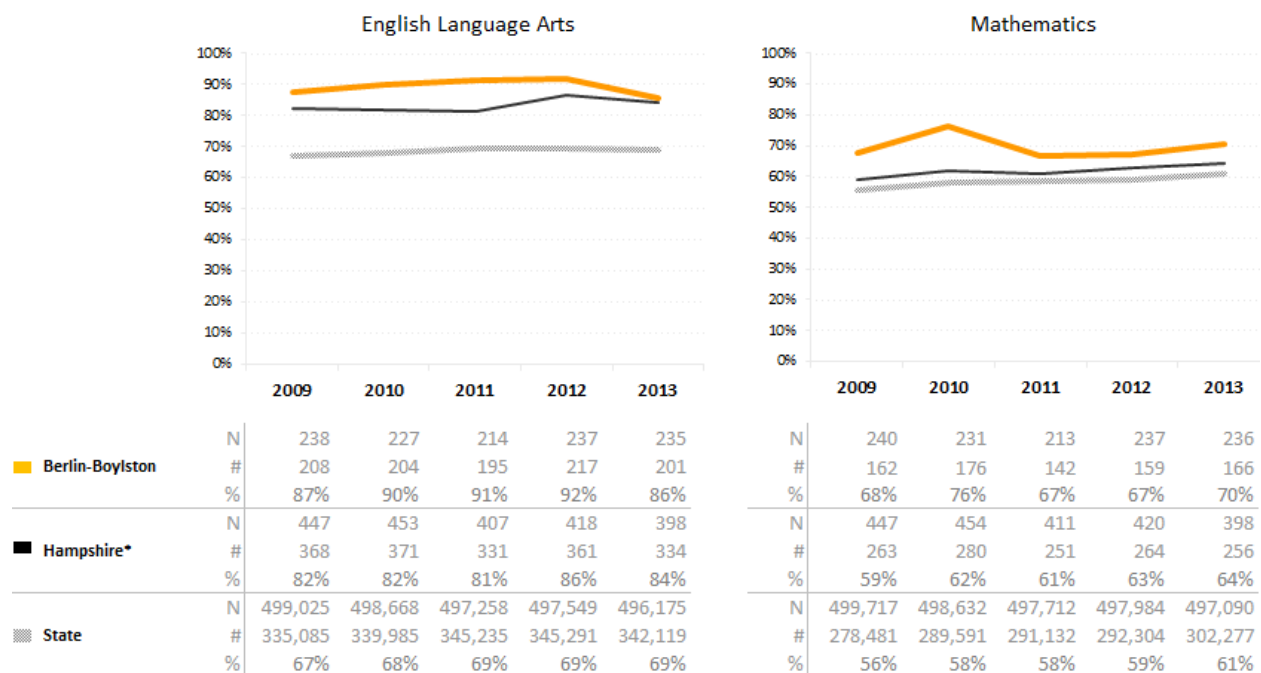
The next set of graphs will compare Tahanto Regional to Hampshire Regional and the State.

Tahanto, Hampshire, and the State

Chart 13: Tahanto, Hampshire, and the State's ELA and Math Performance Rates 2009-'13

Percentage of students scoring proficient or higher

All Grades - All Students



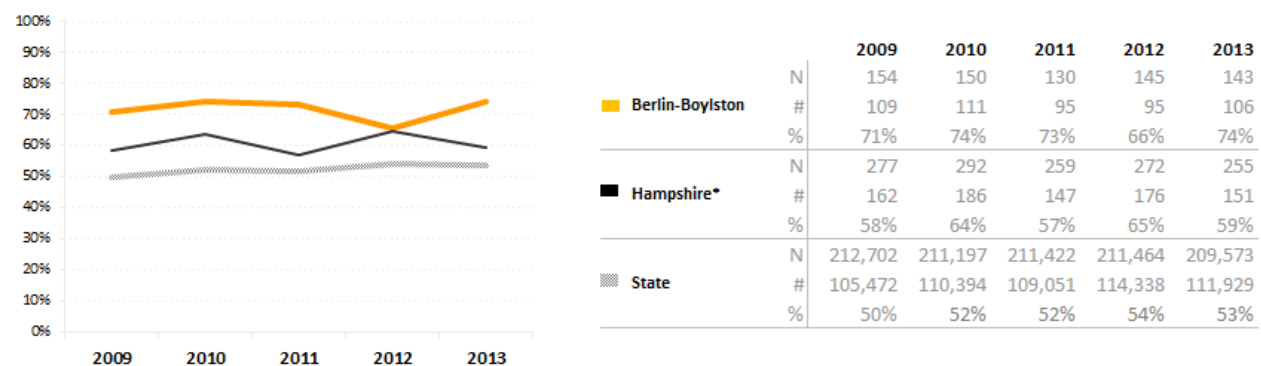
(Source: DESE)

Tahanto outperformed Hampshire in ELA and Math for the past five years, and both schools scored above the State average for the past five years. These two graphs show that Tahanto is doing very well compared to the State and also compared to a similarly sized, demographically composed, and similarly wealthy school.

Chart 14: Tahanto, Hampshire, and the State's Science Performance Rates 2009-'13

Percentage of students scoring proficient or higher in science

All Grades - All Students

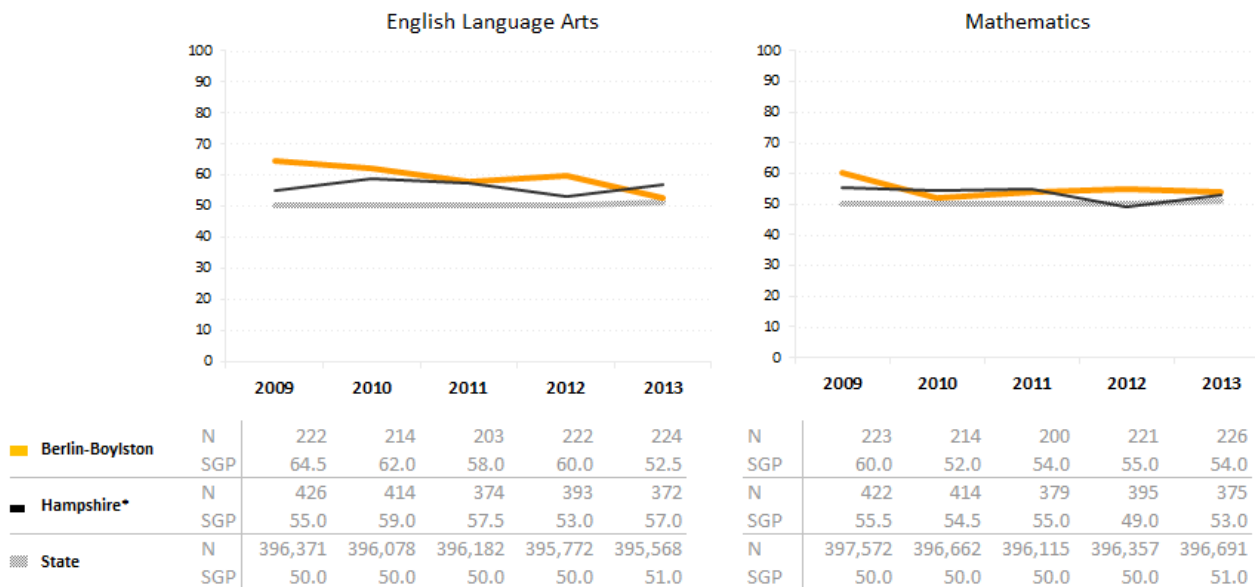


(Source: DESE)

Tahanto outperformed Hampshire in Science for the past five years. Again, both schools scored higher than the State average for the past five years.

Chart 15: Tahanto, Hampshire, and the State's ELA and Math median SGPs with State Averages 2009-'13

Median student growth percentiles (SGP) **All Grades - All Students**



(Source: DESE)

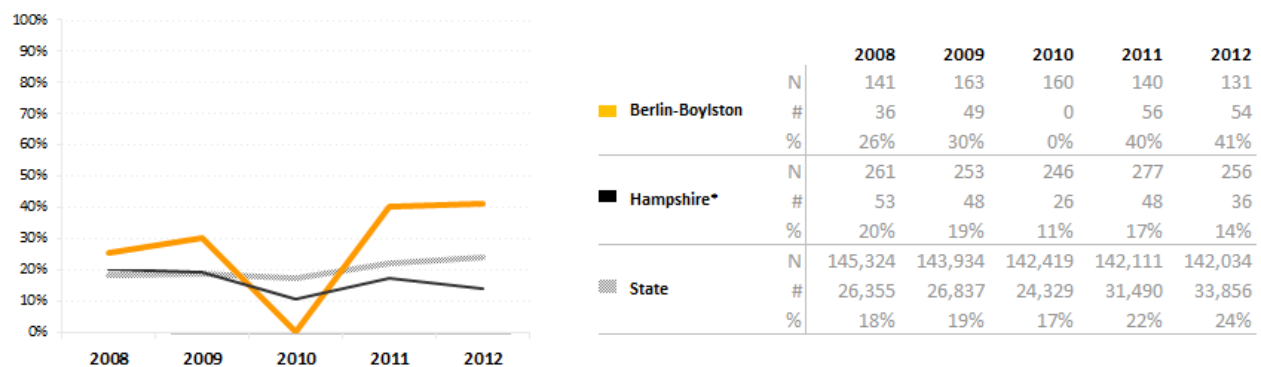
Tahanto's median SGPs in ELA were higher than Hampshire's between 2009-2012. In Math, Tahanto had higher median SGPs than Hampshire in 2009, 2012, and 2013.

Students Enrolled in AP Courses

The next chart from DESE's DART displays the number of high school students enrolled in at least one Advanced Placement (AP) course in Tahanto, Hampshire, and the State on average. The amount of students in AP courses is important to consider in a regionalization feasibility study because it is indicative of a school's capacity; a school only offers AP courses if they have enough resources and qualified students to do so.

Chart 16: Percent of High School Students Enrolled in an Advanced Placement (AP) Course 2008-'12

Percentage of juniors/seniors enrolled in at least one advanced placement course (All grades only) **All Students**



(Source: DESE)

Note: The AP data for Tahanto in 2010 was incorrectly entered by the DESE. The correct number of students is 57, amounting to 36% of the total.

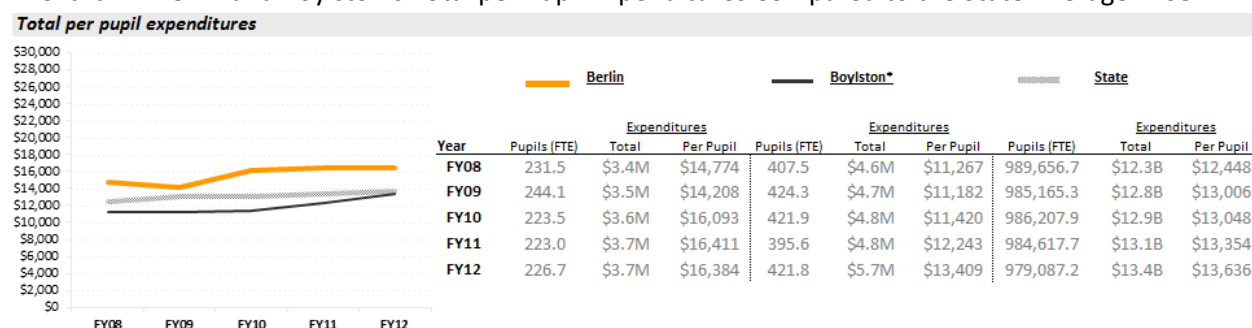
In light of this we can see that Tahanto surpassed Hampshire's 11% and the State's 17% in 2010. This means that Tahanto had more students in AP courses than Hampshire and the State on average from 2008-2012. In this regard, Tahanto is operating at a relatively high level of capacity.

DART Finance

DESE's DART also includes financial data on each school district in MA. Total per pupil expenditures, average teacher salaries, in-district transportation costs per pupil, the percent that each town spent above or below their foundation budget, and each district's required net school spending are included next.

Total per Pupil Expenditures

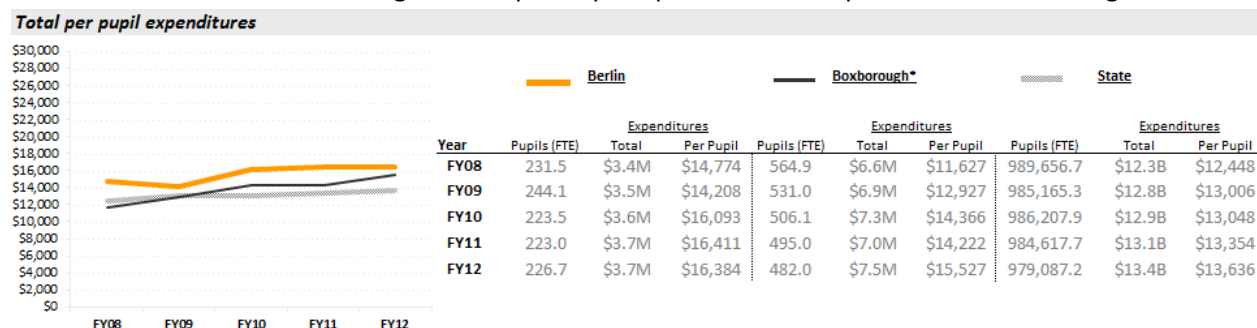
Chart 17: Berlin and Boylston's Total per Pupil Expenditures Compared to the State Average FY08-12



(Source: DESE)

As depicted by Chart 14: Berlin and Boylston's Total per Pupil Expenditures Compared to the State Average (above), Berlin's FY08 and FY12 per-pupil spending exceeded those of Boylston and the State. In FY12, Berlin spent \$16,384 per student; \$2,748 more per student than the State average and \$2,975 more per student than Boylston. Nevertheless, Berlin's student performance levels were lower overall compared to Boylston and the State.

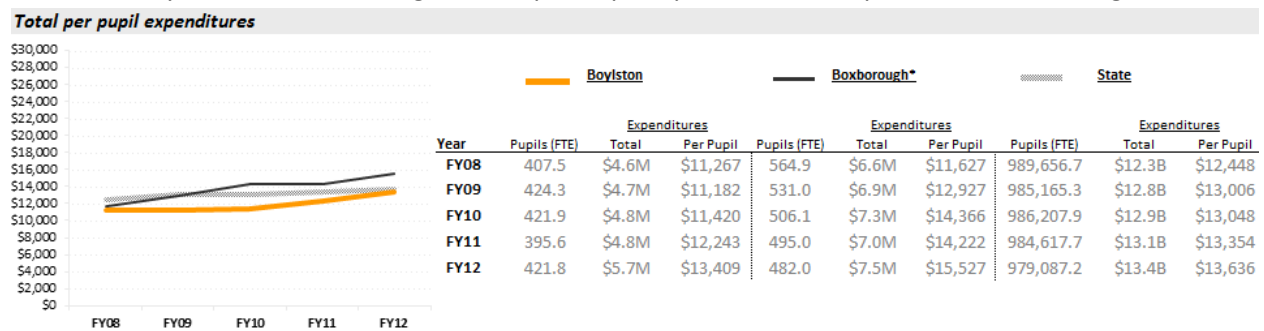
Chart 18: Berlin and Boxborough's Total per Pupil Expenditures Compared the State Average FY08-12



(Source: DESE)

Boxborough spent \$15,527 per student in FY12, \$857 less than Berlin. Nevertheless, Berlin's student performance levels were lower overall compared to Boxborough and the State.

Chart 19: Boylston and Boxborough's Total per Pupil Expenditures Compared to State Averages FY08-12

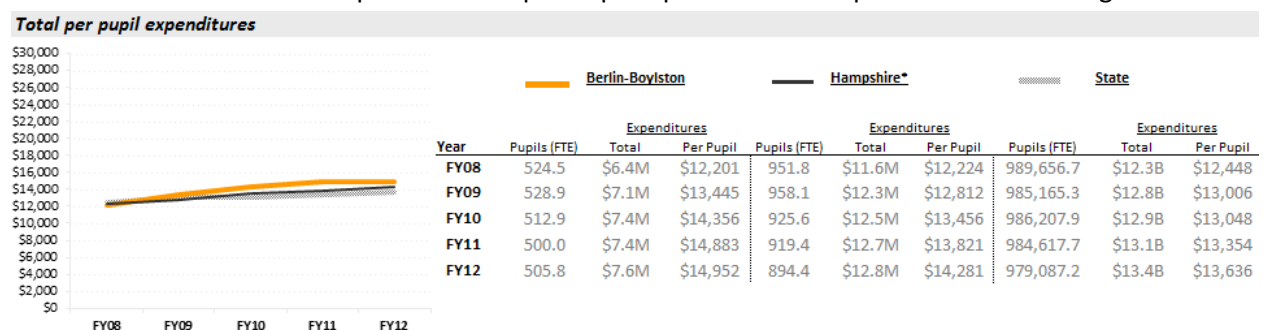


(Source: DESE)

Boxborough spent more per student than Boylston between FY08-FY12. In FY12, Boxborough spent \$2,118 more per student than Boylston.

Although Boylston spent less per student than Berlin, Boylston attained higher student performance levels. Shared resources and increased collaboration between the two schools are recommended.

Chart 20: Tahanto and Hampshire's Total per Pupil Expenditures Compared to State Averages FY08-12

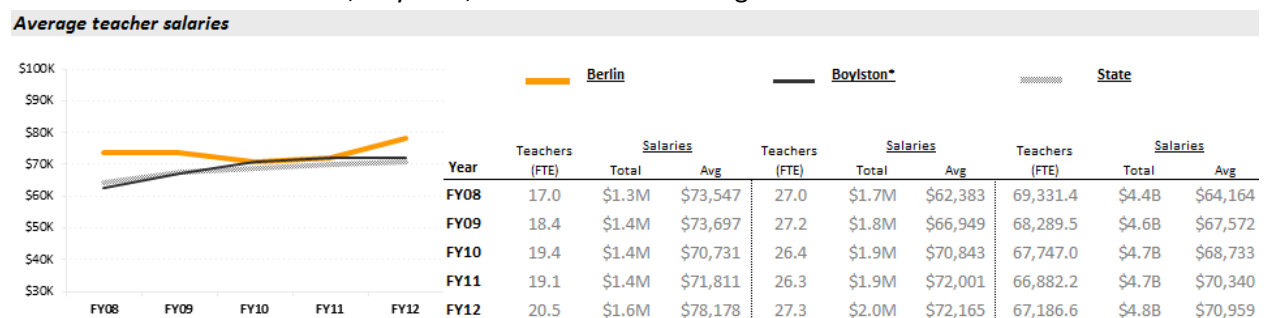


(Source: DESE)

In FY12, Tahanto spent \$14,952 per student, \$627 more than Hampshire, and \$1,316 more than the State average.

Average Teacher Salaries

Chart 21: Berlin, Boylston, and the State's Average Teacher Salaries for FY08-12

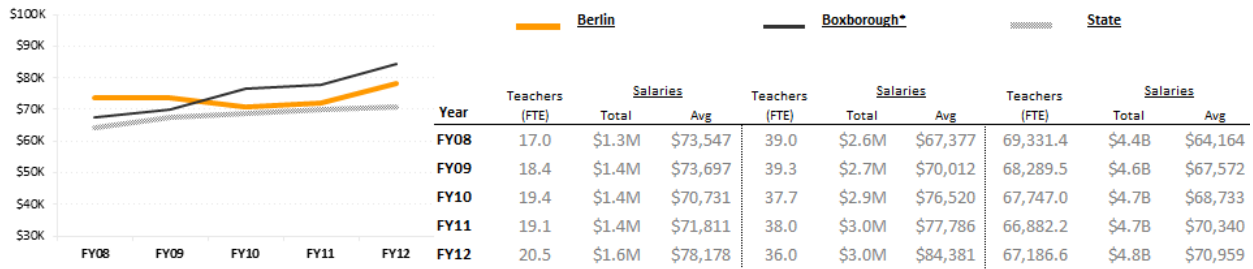


(Source: DESE)

Between Berlin, Boylston, and the State, Berlin had the highest teacher salaries in FY08, FY09, and FY12.

Chart 22: Berlin, Boxborough and the State's Average Teacher Salaries for FY08-12

Average teacher salaries

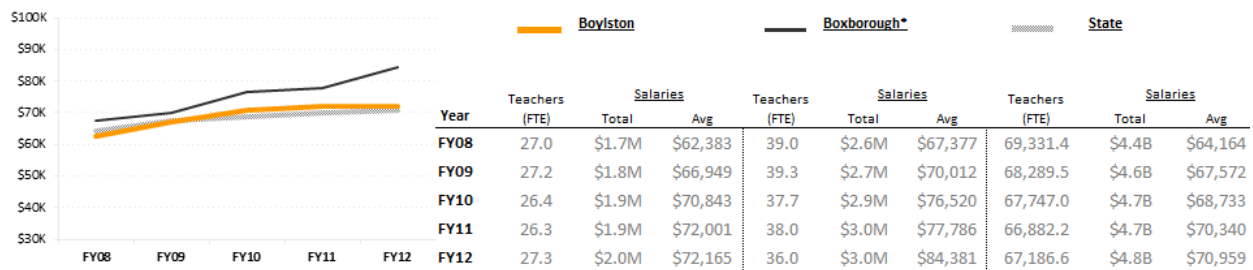


(Source: DESE)

Boxborough spent less than Berlin on their teacher salaries in FY08 and FY09. Boxborough has spent more on their teacher salaries than Berlin from FY10-FY12. In FY12, Boxborough spent \$6,203 more on their teachers than Berlin. Both schools spent more than the State average between FY08 and FY12.

Chart 23: Boylston, Boxborough and the State's Average Teacher Salaries for FY08-12

Average teacher salaries

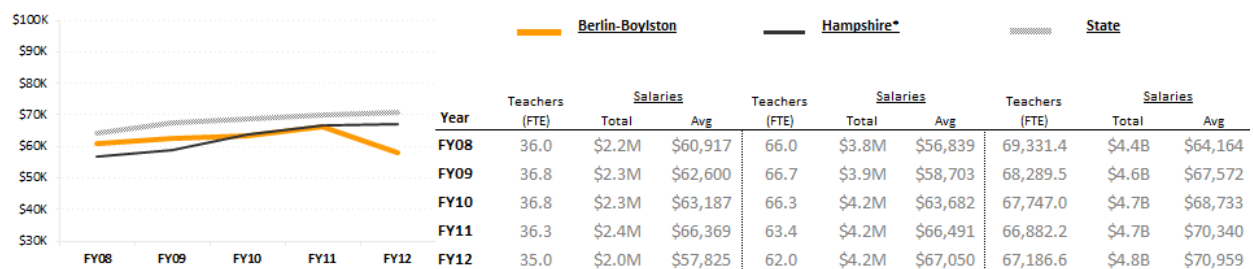


(Source: DESE)

Boxborough spent more on their teachers than Boylston and the State between FY08 and FY12. In 2012, Boxborough spent \$12,216 more on their average teacher salaries than Boylston. This is important to include because it shows that Boylston is spending a reasonable amount on their teacher salaries, while still achieving high student performance levels. Compared to the State, Boylston's average teacher salary is slightly higher, but achieving much higher performance levels. This indicates that Boylston has relatively high capacity as a school district. Capacity generally refers to the ability of a school to provide an adequate education to all of its students.

Chart 24: Tahanto, Hampshire, and the State's Average Teacher Salaries for FY08-12

Average teacher salaries



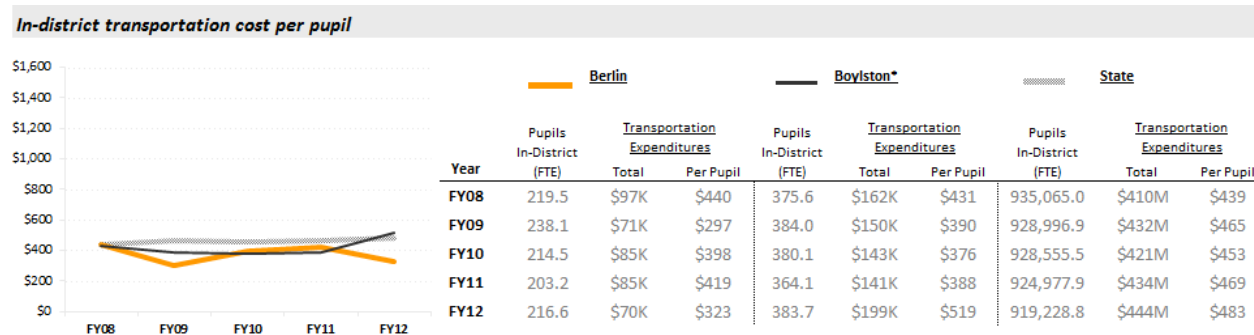
(Source: DESE)

The State's average teacher salary was higher than Tahanto and Hampshire between FY08-12. Tahanto spent more on their teachers than Hampshire in FY08 and FY09; Hampshire spent more on their teachers in FY10, FY11 and FY12.

In-District Transportation Costs

The proceeding charts provide a look into how much each school pays in terms of transporting students. These graphs provide valuable insight into how much schools are spending on transportation compared with similar schools. This information is important to see whether or not Berlin, Boylston and Tahanto are spending a reasonable amount. Later in this feasibility study there will be a discussion on Chapter 71 §7B, the State's Regional School District Transportation Aid. This incentive helps offset some of the transportation costs that regional schools undertake by providing funding for transporting students located 1.5 miles from the regional school.

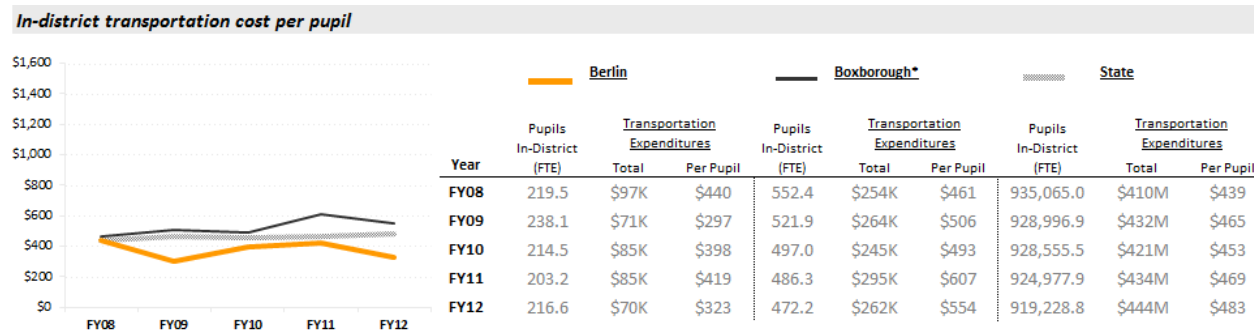
Chart 25: Berlin, Boylston, and the State's In-District Transportation Costs per Student in FY08-12



(Source: DESE)

As the chart above shows, Berlin and Boylston have been spending less on their in-district transportation per pupil costs than the State average between FY08 and FY11. Boylston exceeded the State's spending in FY12, while Berlin's spending dropped further below the State's average.

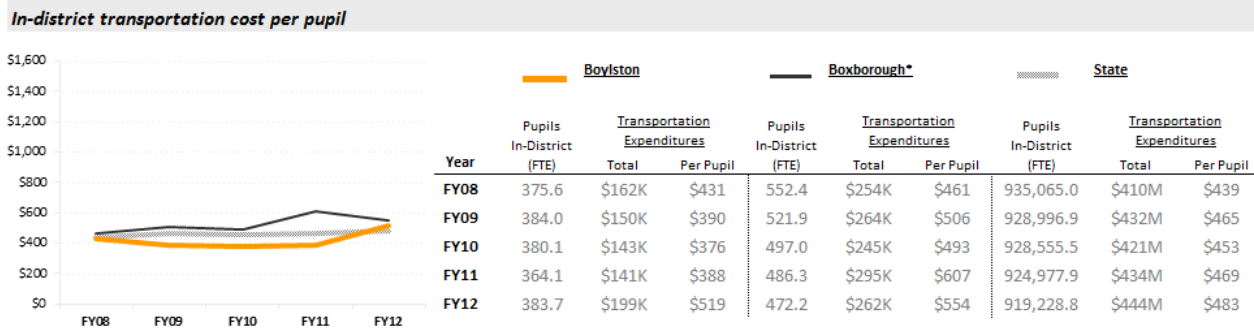
Chart 26: Berlin, Boxborough and the State's In-District Transportation Costs per Student in FY08-12



(Source: DESE)

Boxborough spent more than Berlin and the State on in-district transportation costs from FY08-FY12.

Chart 27: Boylston, Boxborough, and the State's In-District Transportation Costs per Student in FY08-'12

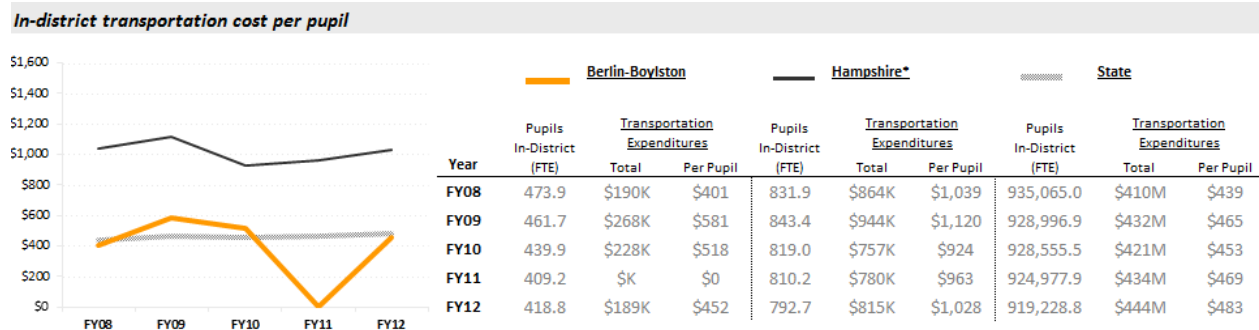


(Source: DESE)

Boxborough also spent more than Boylston on in-district transportation costs from FY08-FY12.

These graphs show that Berlin's per pupil transportation expenditure is significantly below the State average. Boylston's expenditure has been less than the State average up until FY12. Both are spending less than a school of a comparable size and demographic composition on in-district transportation costs.

Chart 28: Tahanto, Hampshire, and the State's In-District Transportation Costs per Student in FY08-'12



(Source: DESE)

David Donoghue, Director of Financial Services for the Berlin-Boylston Regional School District provided CMRPC with the FY11 Tahanto expenditure of \$184,000, with a per pupil rate of \$450.

Hampshire has been spending far above the State average on in-district transportation costs per pupil between FY08-FY12. Tahanto spent less than the State average in FY08 and FY11 and FY12.

Even though Berlin, Boylston, and Tahanto do not have high transportation costs, it is reasonable to consider the benefits of the State's Regional School District Transportation Aid. More details on the regionalization impact of this funding can be found in section: Chapter 71 §7B: Regional School District Transportation Aid.

The remainder of the information contained in the DESE's DART pertains to the changes the State made to the Chapter 70 formula and can be found in section: Chapter 70 State Aid Program and Regionalization Analysis.

Chapter 70 State Aid Program and Regionalization Analysis

Chapter 70

The Chapter 70 State Education Aid program (Ch. 70) is Massachusetts' way of distributing aid for public education. This program started in 1993 under the title, "the Education Reform Act of 1993," and its purpose is to make sure that Massachusetts' public schools are adequately funded to serve all of their students. Before 1993, decisions about public education funding were taken up by each municipality. Ch. 70 does three things: it addresses the need to set an appropriate level of spending for each school student; it makes sure that each town is reasonably contributing to their schools; and it fills the gap between these two numbers with Ch. 70 aid,

"It is the intention of the general courts, subject to appropriation to assure fair and adequate minimum per student funding for public schools in the commonwealth by defining a foundation budget and a standard of local funding effort applicable to every city and town in the commonwealth [M.G.L. c. 70, §. 1]."

For each school district, Ch. 70 consists of three numbers: the Foundation Budget; a Required District Contribution; and the amount of Ch. 70 aid required to fill the gap between the first two numbers.

Foundation Budget

The first number in the Ch. 70 formula is the Foundation Budget. This is the amount of money deemed necessary by the State to provide an adequate education for all the students in a district. This amount is based on: student enrollment numbers; the specific grade levels that a district serves; the academic programs offered; the demographics of the students, including limited income and limited English proficiency students; a municipality's wage adjustment factor (some areas have higher costs of living and need to pay more to attract staff, currently, Berlin's is 1.022 and Boylston's is 1); and the rate of inflation. Calculating the Foundation Budget becomes complex when factors like enrollment numbers in each grade and demographic group are multiplied by a set of education cost categories like professional development, teacher's salaries, and building maintenance; however, calculating the Foundation Budget is mostly dependent on student enrollment numbers. Berlin Memorial, Boylston Elementary, and Tahanto Regional's Foundation Budgets for FY15 are included below:

Table 17: Berlin and Boylston's Foundation Budgets for FY15

School District	Foundation Budget FY15
Berlin Memorial:	\$1,474,056
Boylston Elementary:	\$2,701,536
Tahanto Regional:	\$4,817,370

(Source: DESE)

Foundation Budget Review Commission

Included in the FY15 State Budget is a provision to re-establish the Foundation Budget Review Commission under Chapter 70 §4. Chapter 70 §4 includes the following: reevaluating which services and programs are needed for all students in a district to pass the Massachusetts Comprehensive Assessment System; looking at special education costs; and recommending changes to existing spending percentage levels every even numbered year. There will be four hearings to receive testimony from the public, held throughout the State so that all can attend within a reasonable travel time. It is the CMRPC's recommendation that municipal and school officials from Berlin and Boylston involve themselves in these discussions in order to influence the Commission's recommendations to the State relative to the Foundation formula. A report from the Commission is due to the State on June 30, 2015.

Required District Contribution

The second number in the Ch. 70 formula is a municipality's Required District Contribution; it is primarily based on local property values and income levels. In 2007, however, this number became reformed to more accurately reflect a municipality's ability to contribute to their schools. The 2007 reforms took into account a Municipal Revenue Growth Factor (MRGF) which is a rate that estimates growth in local revenues from year to year (Berlin's MRGF for FY15 is 4.18%; Boylston's is 2.28%; Massachusetts' average is 3.76%). Berlin Memorial, Boylston Elementary, and Tahanto Regional's Required District Contributions for FY15 are as follows:

Table 18: Berlin and Boylston's Required District Contributions for FY15

School District	Required District Contribution FY15
Berlin Memorial:	\$1,240,618
Boylston Elementary:	\$2,336,823
Tahanto Regional:	\$4,122,172

(Source: DESE)

Ch. 70 Aid

The third number in the Ch. 70 formula is the amount of State aid each school district receives. This funding fills the gap between the Foundation Budget and the Required District Contribution, to ensure that each school reaches their Foundation Budget every year. Table 3: Berlin and Boylston's Ch. 70 Aid for FY15 shows how much each school is receiving as well as their percentage of their respective Foundation Budget:

Table 19: Berlin and Boylston's Ch. 70 Aid for FY15

School District	Ch. 70 Aid FY15	% of Foundation Budget
Berlin Memorial	\$437,180	29.66%
Boylston Elementary	\$433,238	16.41%
Tahanto Regional	\$1,049,323	21.78%

(Source: DESE)

As part of the Ch. 70 formula reforms in 2007, the State is requiring each municipality to move closer to a Target Aid share, which for Berlin Memorial, Boylston Elementary and Tahanto Regional, is 17.50% of their Foundation Budgets. 17.50% of a school's Foundation Budget is the minimum percent of Ch. 70 aid a school can receive, as determined by the State in the 2007 reforms. This inversely affects how much each district is required to contribute, which is known as their Target Local share. With a Target Aid share of 17.50% each, Berlin and Boylston's schools' Target Local share are 82.50% each. Fortunately, these "targets" are being sought after over time, meaning that the State is slowly implementing this transition in order for municipalities and districts to adjust to the changes in aid amounts and spending requirements. What this means is that eventually, regardless of whether or not Berlin and Boylston's schools regionalize, each of their districts are going to receive 17.50% of their Foundation Budget from Ch. 70 aid. As you can see by our three schools' current Ch. 70 aid percentages, Berlin and Tahanto are receiving more than their Target Aid Share while Boylston is receiving less.

It is important to note that currently, Ch. 70 amounts and Required District Contribution amounts exceed the Foundation Budget amounts. This is due to the 2007 reforms that: changed Required District Contributions to more accurately reflect a municipality's ability to pay; created Target Aid share and Target Local share amounts; and enacted an incremental implementation process.

It is also important to note that although these three numbers (Foundation Budget, Required District Contribution, and Ch. 70 Aid Amount) constitute the basic structure of the Ch. 70 formula, there are other technical adjustments that get factored in along the way.

The Effects of School Regionalization on the Ch. 70 Formula

One of the questions this feasibility study addresses is, "What would happen to Berlin and Boylston's school's Foundation Budgets, Required District Contributions and Ch. 70 Aid amounts if regionalization occurred?" Roger Hatch, School Finance Programs Administrator from the Department of Elementary and Secondary Education (DESE), who is responsible for calculating Ch. 70 numbers every year, explained that the Foundation Budgets for each school would not change except for the fact that they would be combined together. Mr. Hatch explained that Foundation Budgets are primarily based on student enrollment numbers which would not change because of regionalizing. Therefore, the Foundation Budget for the new regionalized school would be \$8,992,962 (\$1,474,056 + \$2,701,536 + \$4,817,370). Mr. Hatch explained that one aspect of the new Foundation Budget that might change is how much money gets allocated into each of its constituent spending categories. There are eleven spending categories in all: Administration; Instructional Leadership; Classroom and Specialist Teachers; Other Teaching Services; Professional Development; Instructional Equipment and Technology; Guidance and Psychological; Pupil Services; Operations and Maintenance; Employee Benefits/Fixed Charges; and Special Ed Tuition. Mr. Hatch explained that the amount that gets spent on each category is determined by the Ch. 70 formula and to ensure the percentage spending in each category is approximately the same for every school district.

To determine the Required District Contribution, Mr. Hatch advised CMRPC to combine the existing Required District Contributions together. Mr. Hatch explained that Required District Contributions are

mostly based on local property values and income levels, and so they would not change because of regionalizing. The combined three school's Required District Contributions equaled \$7,699,568 (\$1,240,618 + \$2,336,823 + \$4,122,127).

Finally, Mr. Hatch commented on the amount of Ch. 70 aid the proposed regionalized school would receive. To start, Mr. Hatch instructed the CMRPC to add up the amount of Ch. 70 aid each school currently receives, which totals \$1,919,741 (\$437,180 + \$433,238 + \$1,049,323). This is the amount that the new regionalized school would receive in Ch. 70 aid. In order to understand the implications of this number, Mr. Hatch instructed us to divide this amount by the proposed regional school's Foundation Budget and turn it into a percentage; this will tell us what percentage of the new Foundation Budget will come from Ch. 70 aid. $((\$1,919,741 / \$8,992,962) * 100) = 21.35\%$.

Table 20: Proposed Regional School's Ch. 70 Aid as a Percentage of the Foundation Budget

New Ch. 70 Aid (\$)	\$1,919,741
New Foundation Budget (\$)	\$8,992,962
Ch. 70 Aid as % of Foundation Budget	21.35%

(Source: DESE)

The proposed regional school would receive 21.35% of its Foundation Budget from Ch. 70 aid. Since this is higher than 17.50%, which is what Berlin Memorial, Boylston Elementary, and Tahanto's Target Aid Shares are, and also what the proposed regionalized school's Target Aid Share will be, Mr. Hatch explained that the proposed regionalized school district would not receive any additional Ch. 70 funding. Mr. Hatch further stated the Target Aid share (17.50%) would not change in regionalizing because it is mostly determined by student enrollment numbers, local property values, and local income levels, all of which would not change because of regionalizing.

Comparing this new percentage (21.35%) against what each school is currently receiving: Berlin Memorial would stand to share the most of its Ch. 70 aid; Boylston Elementary would see the highest increase in Ch. 70 aid; and Tahanto would receive slightly more Ch. 70 aid than before. However, as mentioned previously, each school's Ch. 70 aid amounts will move closer toward their Target Aid share of 17.50% each year. This means that eventually, whether or not these three schools regionalize, they will each receive 17.50% of their Foundation Budget from Ch. 70 aid.

Christine Lynch, Director of the Office of Regional Governance for DESE, commented on how school regionalization will affect Ch. 70,

"Under the current three district system, the State (through the Ch. 70 formula) dictates the minimum level of funding that must be expended by each of the three districts. Under one PreK-12 district, the State requirement would be combined under one requirement and this spending level would be managed by the one regional school committee in the proportions that made the most sense to their educational plan."

Chapter 71 §7B: Regional School District Transportation Aid

Chapter 71 §7B (Ch. 71) is the State's legislature for assisting regional school districts with the costs of transporting students that live outside a 1.5 mile radius of their schools. This legislation serves as an incentive for schools to regionalize, as non-regionalized schools carry the full burden of these costs.

The goal of this funding program, which began in 1952, was to reimburse regional schools with 100% of the costs associated with transporting students that live outside a 1.5 mile radius of their school. This goal has never fully been met and in the recent past funding has been cut in accord with the state of the economy, going from 89.9% reimbursement rates in FY08 to 57.7% in 2010. By FY14 this program's reimbursement rate was at 66.4%. However, for FY15 the program has been appropriated an extra \$15 million dollars, bringing the reimbursement rate up to 90%. It may be argued that this source of funding should not be depended upon. Senator Stephen M. Brewer commented to the Telegram & Gazette in August of this year, "Ninety percent is a gold standard of where we would like to go (LaPlaca, 2014)."

Jay Sullivan, Executive Director of the DESE's School Finance and District Support Center, who oversees calculating Ch. 71 reimbursements every year, provided insight on the program as well how much Berlin and Boylston would receive if they regionalized their three school districts together.

Mr. Sullivan explained that the amount of Ch. 71 each regional school district receives depends on the amount of funding that gets appropriated by the State for Ch. 71 each year, as well as the number of students who live outside a 1.5 mile radius of their school. When a school does not use all of its Ch. 71 funding, the remainder is returned to the State and utilized in the next fiscal year.

Mr. Sullivan calculates the amount of transportation aid available for regional schools, or for schools that are considering regionalization, by using the annual Schedule 7 reports submitted by each school district. Mr. Sullivan said that although the reports are due in September, they usually don't come in until late October, and that his analysis of them is completed by the same time the following year. FY14 reports won't be received until October. For this reason, Mr. Sullivan provided CMRPC with FY13 data: Berlin spent \$58,913 and Boylston spent \$95,691 transporting students outside a 1.5 mile radius of their school. This totals \$154,604. Mr. Sullivan calculated that if Berlin and Boylston regionalized their schools for the 2013 school calendar year, they would have received between \$95,000 and \$100,000 (61.45-64.68% of total) in transportation aid by the end of FY14. The regionalized school district would have spent \$59,604 or less on transportation costs associated with students who live outside a 1.5 mile radius of their school. For reference, in FY13, Tahanto spent \$192,198 and was reimbursed \$127,686 (66.43%) in FY14.

Here, FY13 data is used to determine FY15 reimbursements. Ch. 71 funding was increased to a 90% reimbursement rate in the FY15 State budget. In FY13, the additional funding would have represented \$139,143 dollars ($154,604 \times .9$). This savings means that Berlin and Boylston would have only spent \$15,460 on transporting students who live outside a 1.5 mile radius of their school.

Table 21: Berlin and Boylston’s FY14 Regional Transportation Aid

	FY13 Spending
Berlin Memorial	\$58,913
Boylston Elementary	\$95,961
Total Spending	\$154,604
FY14 60-65% Reimbursement Rate	\$95,000 - \$100,000
Total Spending Minus 60-65% Reimbursement Rate	\$54,604 - \$59,604
FY15 90% Reimbursement Rate	\$139,143
Total Spending Minus 90% Reimbursement Rate	\$15,460

These savings are substantial. This program provides a strong incentive for the Berlin and Boylston schools to regionalize PreK-12.

Chapter 71 §16D (g): Regional Bonus Aid

Another source of funding for a newly established regional school district is M.G.L. Ch. 71 §16D (g). This “Regional Bonus Aid,” subject to the appropriation set forth in each year’s state budget, allocates five years of additional funding for a newly regionalized school district. The new regional school receives \$50 per student in the first year, \$40 per student in the second year, \$30 per student in the third year, \$20 per student in the fourth year, and \$10 per student in the fifth and final year after regionalization. M.G.L. Ch.71 §16D (g) reads as follows:

“(g) Notwithstanding the foregoing provisions, regional bonus aid, but no other aid pursuant to this section, shall be paid to any regional school district formed after fiscal year nineteen hundred and ninety-three for the immediate five fiscal years following the establishment of said regional school district. Regional bonus aid shall be payable in an amount equal to fifty dollars per foundation enrollment, in the first fiscal year following the establishment of said regional school district; forty dollars per foundation enrollment in the second fiscal year following the establishment of said regional school district; thirty dollars per foundation enrollment in the third fiscal year following the establishment of said regional school district; twenty dollars per foundation enrollment in the fourth fiscal year following the establishment of said regional school district; and, ten dollars per foundation enrollment in the fifth fiscal year following the establishment of said regional school district.”

According to Christine Lynch, Director of the Office of Regional Governance for DESE, this funding does not include students that are tuition in or choice students. Also, because Tahanto has been a regional school for over five years, if Berlin Memorial, Boylston Elementary and Tahanto Regional were to regionalize, this legislature would not provide a Regional Bonus Aid for the students enrolled in grades 6-12.

In estimating the amount of funding this program would bring in, we used Berlin and Boylston's 2013-2014 student enrollment numbers. CMRPC chose to use these numbers because they show what would have been received if Berlin and Boylston's schools regionalized in the previous year. Continuing to use these numbers to calculate the amount of funding seen over the next four years of this program provides a reasonable estimate for what the total amount of funding this program would provide.

Table 22: Berlin and Boylston's Student Enrollment for the 2013-2014 School Year

Berlin Memorial (BMS) and Boylston Elementary (BES) Student Enrollments 2013-2014					
Grade	BMS Enroll	BMS Choice	BES Enroll	BES Choice	Elementary Total
Pre-K Regular Ed	7	4	8	0	19
Pre-K Special Ed	10	0	3	0	13
Total	17	4	11		32
Kindergarten – full	29	0	26	2	57
Kindergarten – half	0	0	6	0	6
First	22	4	45	1	72
Second	30	6	53	4	93
Third	19	7	50	3	79
Fourth	29	3	56	3	91
Fifth	24	10	51	5	90
Subtotal	153	30	287	18	488
Combined (w/o prschl)		183		305	
Combined (w/ prschl)		204		316	520
+Out of District	1		2		3
Total (w/o prschl)		184		307	491
Total (w/ prschl)		205		318	523

(Source: BBRSD)

Berlin's total student enrollment in October of 2013 was 205 and Boylston's was 318 students; this totals 523 students. However, Berlin had a total of 34 Choice Students and Boylston had 18, this means that a Regional Bonus Aid would only be received for 471 students in the 2013-2014 school year. Below is a table showing a reasonable estimate for the amount of funding that Ch. 71 §16D would provide to the proposed regional school district over the first five years:

Table 23: Ch. 71 §16D Regional Bonus Aid

Year of Program	# of Students and Funding Total
First	471 * \$50 = \$23,550
Second	471 * \$40 = \$18,840
Third	471 * \$30 = \$14,130
Fourth	471 * \$20 = \$9,420
Final	471 * \$10 = <u>\$4,710</u>
Total Regional Bonus Aid	\$70,650

(Source: CMRPC)

Financial Implications

Health Insurance

Table 24: FY15 Health Insurance Rate Analysis
Fiscal Year 2015 Health Insurance Rate Analysis

Berlin Boylston 75/25 Boylston 63/37									
	HMO Blue Family	Employer Cost	Employee Cost	# of EEs	HMO Blue Individual	Employer Cost	Employee Cost	# of EEs	Employer Cost
Berlin Boylston	\$ 1,525.42	\$ 1,144.07	\$ 381.36	23	\$ 575.62	\$ 431.72	\$ 143.91	8	\$ 29,767.22
Boylston	\$ 1,713.74	\$ 1,079.66	\$ 634.08	23	\$ 646.70	\$ 407.42	\$ 239.28	8	\$ 28,091.46
Monthly Cost	\$ (188.32)	\$ 64.41	\$ (252.73)	23	\$ (71.08)	\$ 24.29	\$ (95.37)	8	\$ 1,675.75
Annual Cost	\$ (2,259.84)	\$ 772.91	\$ (3,032.75)	23	\$ (852.96)	\$ 291.53	\$ (1,144.49)	8	\$ 20,109.05

Berlin Boylston 75/25 Berlin 75/25									
	HMO Blue Family	Employer Cost	Employee Cost	# of EEs	HMO Blue Individual	Employer Cost	Employee Cost	# of EEs	Employer Cost
Berlin Boylston	\$ 1,525.42	\$ 1,144.07	\$ 381.36	22	\$ 575.62	\$ 431.72	\$ 143.91	4	\$ 26,896.29
Berlin	\$ 1,872.86	\$ 1,404.65	\$ 468.22	22	\$ 764.05	\$ 573.04	\$ 191.01	4	\$ 33,194.34
Monthly Cost	\$ (347.44)	\$ (260.58)	\$ (86.86)	22	\$ (188.43)	\$ (141.32)	\$ (47.11)	4	\$ (6,298.05)
Annual Cost	\$ (4,169.28)	\$ (3,126.96)	\$ (1,042.32)	22	\$ (2,261.16)	\$ (1,695.87)	\$ (565.29)	4	\$ (75,576.60)

Regionalized District Annual Cost									
	\$ (6,429.12)	\$ (2,354.05)	\$ (4,075.07)		\$ (3,114.12)	\$ (1,404.34)	\$ (1,709.78)		\$ (55,467.55)

Summary: The Towns would save a combined \$55,467.55 per year should regionalization occur
 (Based on the current enrollment and health insurance rates for FY15)

Retirees 50%	Under 65 F	Under 65 I	Medex
Berlin	\$ 762.71	\$ 287.81	\$ 140.00
Annual Cost	\$ 9,152.52	\$ 3,453.72	\$ 1,680.00

Summary: The Town of Berlin does not currently offer retiree health insurance benefits. Should regionalization occur, an additional District expense would occur for each future qualified Berlin Memorial School retiree.

(Source: CMRPC)

Projected Regionalized Net Health Insurance Savings: \$ 55,000

Salary Schedule and Union Analysis

The Berlin Memorial School Teachers, Boylston Elementary Teachers and Berlin-Boylston Regional School District Teachers all have separate contracts and salary schedules. The major difference lies in the salary amounts, steps and professional experience levels in the Berlin salary schedule as compared

to the others. Grandfathered Berlin teachers maximize their step level at 11+, if they were on Step 11 during the 2010-2011 school year. Employees hired on or after March 10, 2014 shall not advance past the professional experience Step 5 in the B, B+15 and B+36 columns. A longevity increment of \$500 is included in the Boylston and Berlin-Boylston regional School District's contract. In order for a teacher to receive a longevity increment after reaching the eleventh step on the salary scale, one of the conditions shall be that the teacher must fulfill the requirement of three semester hours of post-graduate training (with course approval by the Superintendent).

The salary schedule analysis indicates an increase of \$159,304 will be incurred to transfer all teachers onto the Berlin Teachers' Salary Schedule. Although CMRPC is recognizing the total additional expense, the salary changes may be phased in to a single salary schedule at the end of an agreed upon time, normally within three years.

The collective bargaining agreements, subject to negotiations, could be considered an impediment to regionalization, should the District transfer all Boylston and Berlin-Boylston Regional teachers to the Berlin salary schedule. The annual cost, based on 2013-2014 rates, to add the Boylston teachers onto the Berlin salary schedule would be \$92,626, while the cost to add the Berlin-Boylston teachers to the Berlin salary schedule would be \$66,678. The combined additional cost would be \$159,304. See salary schedules and the comparison charts in Appendix A.

Projected Salary Schedule Increase: \$159,304

The Berlin-Boylston Public Schools have entered into unified agreements with the following groups: cafeteria, custodial, para professionals, secretarial and tutors. Regionalization shall have no impact on the staff members employed within units mentioned above, as the salary schedules are the same amongst the three schools.

The Boylston Elementary and Berlin Memorial teachers belong to the Massachusetts Teachers Association, while the Berlin-Boylston Regional teachers belong to the American Federation of Teachers; the union members would decide which association would represent the regionalized district.

Summary

Savings

Projected Additional Regional School District Transportation Aid:	\$139,143
Projected Regionalized Net Health Insurance Savings:	\$ 55,000
Projected Chapter 71 Regional Bonus Aid (1 st year of 5 year program):	<u>\$ 23,550</u>
Projected Regionalization Savings:	\$217,693

Cost

Projected Boylston Elementary Salary Schedule Increase:	\$ 92,626
Projected Tahanto Regional Middle/High Salary Schedule Increase:	<u>\$ 66,678</u>
Projected Regionalization Costs:	\$159,304

Total

Total Projected Savings from Regionalization:

\$ 58,389

Conclusions, Options, Recommendation, and Action Items

Conclusions

Following a comprehensive review of pre-existing literature and a multi-variable analysis of local and comparative factors, CMRPC determined that a consolidated, preK-12 District in Boylston and Berlin would address many challenges that the schools currently face. Berlin Memorial suffers from high administrative costs, a limited professional development budget, and comparatively low MCAS scores. Similarly, Boylston Elementary has high administrative costs and turnover rates. Tahanto Regional has strong extracurricular offerings and sufficient student performance figures; however, it has additional room for growth in terms of course offerings. As a result of this study, CMRPC believes that regionalization will partially address most (if not all) of these issues. CMRPC's analysis of regionalization outcomes indicated that regionalized school districts have: better long-term fiscal stability; better district capacity; reduced facility needs; greater administrative retention; better qualified job candidates; and better articulated curriculums. These impacts have a significant impact on student performance and educational opportunity. CMRPC believes these two impacts are the greatest factor in support of Berlin, Boylston, and Tahanto's regionalization. By consolidating curriculums and eliminating unnecessary duplications the schools can predict increased student performance measures. Additionally, CMRPC anticipates regionalization will yield a net fiscal savings of \$58,389. This finding further informed CMRPC's recommendation, given the current economic climate and the fiscal constraints that towns, schools and taxpayers are experiencing. Such savings can be re-invested into the schools to further support: evaluation; student resources; technological updates or increases; free administration from operational tasks to increase focus on instructional leadership; repairing school buildings; and other necessary improvements.

Educational Benefits

The first conclusion is derived from the Department of Elementary and Secondary Education's (DESE) 2010 report titled, "Regional Planning Study Results." The report summarized the results of individual and recent planning studies and compares their findings with what has been identified as concerns or benefits of regionalizing in the past. In this report, the DESE states that,

"Many of the final reports did not address educational issues directly but rather concentrated on the cost of regionalizing and determined that the educational advantages would not outweigh the additional financial investment. Those that did address educational issues consistently reported that they envisioned educational improvements in a regionalized situation. Towns and districts that recognize these advantages are exploring creative ways to resolve identified obstacles."

This statement could be seen as supportive of, or in opposition to, regionalization. First, the DESE states districts that only considered costs did not find enough reasons to regionalize, while those that

considered educational benefits reported clear improvements through regionalization. This is important to consider because it underlines the fact that anything is feasible; the only question is, “at what cost?” Second, the DESE indicated the towns and districts that saw an educational improvement are looking at other ways to achieve these ends; this indicates that other options exist besides regionalization. Third, the DESE did not say, “the districts that saw a clear educational benefit ultimately chose to regionalize.” This may indicate that the financial burden of regionalizing was consistently overwhelming. CMRPC considered both costs and education benefits, and concluded the regionalization would both recognize a savings and enhance the student’s education.

School Committee Equality

This article provided recommendations for creating a new regional school committee. The study found that local control issues were a common concern for towns that were looking to regionalize, and that residents who were concerned they would have little voice in regional deliberations proposed electing school committee members by at large elections, “this method satisfies the one person one vote requirement, but provides all residents in all towns with an equal opportunity to vote for all members of the school committee (Lynch, 2010).”

Central Office Capacity Improvement

The second conclusion supporting regionalization can be found in Massachusetts Association of Regional Schools’ (MARS) 2009 report titled, “A Study of Central Office Capacity in Regional Districts.” MARS’ study examined central office staff and their roles or functions in terms of district size. One of the primary conclusions of this report was that,

“Superintendents and clerical staff in smaller districts have primary responsibility for more functions than in larger districts. This indicates superintendents are likely to have less time available for instructional leadership, and that clerical staff often have primary responsibility for functions that in larger districts are done by business officials or technology directors.”

In addition, this article’s “survey instrument” was used to analyze the roles or functions of Berlin and Boylston’s school districts, as well as comparable districts according to the DESE’s District Analysis Review Tool. The results of this inquiry were used to answer a couple of “questions” in the Special Commission on School District Collaboration and Regionalization’s Capacity Assessment Tool. This tool found that the administration at all three Berlin and Boylston schools are in fact performing more roles or functions than the administration at comparable districts. It is clear by the results of the studies that Berlin and Boylston could stand to improve upon their efficiencies, which ultimately affects their effectiveness. The administration’s ability to provide instructional leadership has a direct effect on the education of the students; more teacher supervision and coaching leads to better classroom lessons for students which leads to improved MCAS scores and more able students to succeed in higher education.

False Commonly Held Beliefs

The third set of conclusions made is from Worcester Polytechnic Institute’s 2010 study titled, “A Cost-Benefit Analysis of School Regionalization in Massachusetts.” The study considered six hypotheses about

school districts and regionalization, and it used data from regionalized and non-regionalized schools in Worcester County as a study sample. This study found that:

1. Regionalized schools do not have higher total SAT test scores than non-regionalized districts;
2. Schools that represent a larger student population do not have lower per pupil spending than schools representing a larger population;
3. Regionalized districts do not have larger student to teacher ratios than non-regionalized districts;
4. School districts with a larger student population do not represent a higher total SAT score than school districts representing a smaller population;
5. School districts that represent a smaller student population do not represent a higher graduation rate; and
6. Housing values in districts containing regionalized schools are not greater than housing values in non-regionalized districts.

It is important to review what each conclusion in this article means for Berlin and Boylston. Conclusion number one means that whether or not Berlin and Boylston regionalize, their total SAT test score will not raise or lower. Conclusion number two means that schools with a larger student population do not have lower per pupil spending than schools representing a larger population. The Special Commission on School District Collaboration and Regionalization provides some support for this statement, which will be elaborated upon in the next paragraph. Conclusion number three means that whether or not Berlin and Boylston regionalize, their student to teacher ratios will not change. Conclusion number four means that if Berlin and Boylston regionalize, just because they will have a larger student population does not mean they will have a higher total SAT test score. Conclusion number five means that whether or not Berlin and Boylston regionalize, their graduation rates will not change. Conclusion number six means that whether or not Berlin and Boylston regionalize, their housing values will not change.

Reduced Median Cost per Pupil

The fourth conclusion stems out of WPI's second conclusion as well as a table from the Special Commission on School District Collaboration and Regionalization's ("Special Commission") Report to the Legislature. WPI's second conclusion that states schools with larger student populations do not have lower per pupil spending; this is in agreement with the Special Commission's table on school district type, size, and median per pupil expenditures. The Special Commission based its table off of DESE data, and it reaffirms the conclusion that WPI came to: schools with larger student populations do not necessarily have lower per pupil costs. The Special Commission's table goes further by showing that smaller districts have higher median per pupil costs too. Certain district types with medium student enrollment sizes are shown to have the lowest per pupil costs. Applying Berlin and Boylston's schools to the Special Commission's table shows that the type and size of district the proposed regional school district would be has lower costs per pupil than what the schools are currently experiencing. The projected savings could come from a number of places: better utilization of school building space, staff, and teachers; more efficiencies in central office staff; coordinated and greater group purchasing power; and better use of educational collaboratives could all provide additional savings once the three district

system becomes a one district system. CMRPC recognized the potential financial implications in this study to support regionalization.

Potential of Educational Collaboratives

The fifth conclusion used to support regionalize is the Pioneer Institute, in a White Paper called, “Case Studies of Success and Failure in Massachusetts.” In this paper, The Education Cooperative as well as other education collaboratives in the State are discussed. Educational collaboratives arose out of the need for schools to provide all of their students with an adequate education, including students with disabilities. Instead of building an in-house program for a low-incidence student with disabilities, schools tuition out these students to TEC and other collaboratives who have the accommodations already built into their school. After their success in providing services for extremely low-incidence students, education collaboratives began to branch out in providing other services, such as purchasing programs. TEC is leading the way by providing a framework for shared thinking across school-related functions, which breeds collaborative thinking. TEC’s “job-alike” programs help education-related professionals share job challenges and experiences with their regional peers. The collaborative approach was important to consider when deciding whether or not to regionalize the schools of Berlin and Boylston, as it demonstrates regionalization is not the only method for reducing costs, increasing collaboration, and supporting professional development. The Berlin Boylston public schools are a member of the Assabet Valley Collaborative.

Opportunities and Obstacles of Regionalization

The sixth conclusion to keep in mind comes from the DESE’s 2009 report titled, “School District Consolidation in Massachusetts: Opportunities and Obstacles.” This report makes clear arguments in favor of regionalizing in light of long-term trends and benefits. The first long-term trend to be considered is the decline in student enrollment throughout the State until 2019, where the most strain will be put on smaller districts, similar to Berlin Boylston. The second trend to consider is the current lack of administrative staff in Massachusetts as well as the large population of administration that will soon be retiring. The demand for superintendents results in higher salaries, and smaller districts suffer the most because they are unable to offer competitive wages, often resulting in frequent turnover. Retired superintendents are being hired interim to help fill the void, but this practice has proved both insufficient and unsustainable.

Increased Ability to Control Spending

A couple of considerations should be factored into this decision as well. The first comes from the Ch. 70 analysis, where Christine Lynch, Director of the Office of Regional Governance for DESE, explained that,

“Under the current three district system, the State (through the Ch. 70 formula) dictates the minimum level of funding that must be expended by each of the three districts. Under one PreK-12 district, the State requirement would be combined under one requirement and this spending level would be managed by the one school committee in the proportions that made the most sense to their educational plan.”

This ability to control where the funding gets spent allows the new regional school committee to focus on the district programs as a whole, from Prek to graduation.

Academic Improvements and Possible Student Choice and Tuition Trends

The second set of considerations comes from Berlin Memorial's MCAS scores and the school regionalization survey. CMRPC concludes that if Berlin and Boylston's schools become regionalized their educational performances will ultimately be improved. This will be a result of the administration's increased ability to evaluate their teachers as well as the ability of the regional school committee to control where money gets spent, such as in professional development or extracurricular offerings. This is especially significant for Berlin Memorial who had the lowest MCAS scores of all three schools. As student performance levels improve, CMRPC anticipates the resident enrollment level at the Berlin Memorial School will increase. Students currently enrolled elsewhere as school-choice, may return to their local school. The result of returning school-choice "out" students will be a reduction in cost of the outgoing tuition. However, some respondents to the regionalization survey stated they would take their students out of their elementary school if Berlin and Boylston's schools become regionalized. One resident of Berlin and parent of a student at Berlin Memorial stated, "I will send my kids to private school if you regionalize." This stemmed from the parent's concern for higher student to teacher ratios, as evident through their other responses to the survey. This is a common perception about regionalization; however, this perception was disproved by WPI's 2010 study of regional and non-regional schools in Worcester County.

Options

The options presented to the School Committees are:

1. Remain as three school districts under a Superintendency Union; or
2. Regionalize into a single PreK-12 School District.

Recommendation

Based on the research and analysis put forth in this feasibility study, CMRPC recommends the Berlin and Boylston schools regionalize. Massachusetts' student enrollment is projected to decline through 2019, decreasing the demand for separate school facilities. Moving from a three-district system to a single PreK-12 district system will reduce unnecessary overhead and improve student outcomes. The anticipated academic benefits include the ability to support as well as increase the level of student achievement by improving student performances through a more refined and coordinated curriculum. The regionalization of the three schools and the central district office will also yield financial benefits by increasing revenue with regional transportation and bonus aid incentives and the reducing costs associated with health insurance.

Action Items

CMRPC recommends the following action items:

1. Participate in the hearings to be held by the re-established Foundation Budget Review Commission

2. Partake in the services available at the Assabet Valley Collaborative
3. Continue to purchase collaboratively to recognize volume discounts
 - Consider new categories of supplies to purchase collectively
 - Office, Classroom, Art, Cafeteria, Athletic, Custodial, Fuel Oil, Natural Gas
 - Consider individual line items to purchase collectively
 - French River Education Center
4. Create an Inter-Municipal Agreement which allows for the sharing of school employees
5. Consolidate the three health insurance plans into one for more competitive rates, which will reduce costs
 - Employee Health Insurance Advisory Committee
6. Combine the Central Office/Administrative salary apportionments into the Berlin Boylston Regional payroll. Reimbursements from Berlin and Boylston may be included in their assessment payments.
7. Align the curriculum in the elementary schools to provide a balanced level of education at the elementary level
 - Partnership for Assessment of Readiness for Colleges and Careers (PARCC)
 - Developed a literacy committee with teachers from all three districts, parents from both communities and administration
 - The committee has identified where the gaps are within the current ELA curriculum, which was reviewed with the Superintendent.
 - The recommendation back to the literacy committee was to identify an appropriate core reading program.
 - Carol Bradley-Costello researched 5 potential programs
 - The administration reviewed all programs to bring at least 2 back to the literacy committee for recommendation
 - The literacy committee then attended webinars and presentations on these 2 programs and made a final recommendation to the Superintendent.
 - In FY15 we will be purchasing the new core reading program for grades K, 1 and 2. (We are doing this in a 2 year process in order to budget all of the requirements in the curriculum.) **FY16 grades 3, 4 and 5 will be purchased.
 - In June of 2014 – teachers will be provided a workshop from the company regarding these new materials.
 - Summer – teachers will be provided a stipend to work with their colleagues in developing a curriculum with the new program.

- In Fall of 2014 – Teachers in grades K, 1 and 2 will be implementing the new core reading program, which aligns with the PARCC assessment.
- In Fall of 2014 – Sally Grimes, national literacy specialist, will be working with teachers in grades K, 1 and 2 to implement the program with fidelity. She will guide on instructional practices, data collection and providing a rigorous literacy program for our students.
- In Fall of 2014 – Coordinate a parent literacy event, including Sally Grimes, to assist parents in understanding early literacy so they can support their children in the home.

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Appendix A: Berlin and Boylston Salary Schedules and Comparison Charts

APPENDIX A

BERLIN TEACHERS' SALARY SCHEDULE

2013-2014 Berlin Teachers' Salary Schedule

(1.0% increase)

Professional Experience	B	B+15	M / B+36*	M+15	M+30	M+45	M+60
0	\$45,781	\$46,962	\$48,141	\$50,078	\$52,000	\$53,819	\$55,702
1	\$47,688	\$48,883	\$50,078	\$52,000	\$53,938	\$55,827	\$57,782
2	\$49,590	\$50,795	\$52,000	\$53,938	\$55,850	\$57,805	\$59,831
3	\$51,709	\$52,894	\$54,080	\$55,976	\$57,865	\$59,888	\$61,983
4	\$53,567	\$55,083	\$56,600	\$58,481	\$60,363	\$62,474	\$64,660
5	\$55,438	\$57,276	\$59,110	\$61,005	\$62,886	\$65,088	\$67,366
6	\$57,928	\$60,094	\$62,261	\$64,154	\$66,036	\$68,346	\$70,736
7	\$59,809	\$62,288	\$64,766	\$66,659	\$68,553	\$70,951	\$73,435
8	\$61,663	\$64,475	\$67,286	\$69,180	\$71,054	\$73,539	\$76,114
9	\$63,531	\$66,670	\$69,807	\$71,689	\$74,208	\$76,803	\$79,495
10	\$65,408	\$68,868	\$72,327	\$74,837	\$77,346	\$80,055	\$82,857
11	\$67,272	\$71,364	\$75,453	\$77,983	\$80,491	\$83,307	\$86,224
11+**	\$67,945	\$72,078	\$76,207	\$78,763	\$81,295	\$84,140	\$87,086

Employees hired on or after March 10, 2014, shall not advance past the professional experience Step 5 in the B, B+15, and B+36 columns.

*The B+36 credits designation shall be applicable only to teachers who are not required by the Massachusetts Department of Education to earn a Masters Degree. Teachers seeking the B+36 credits status on the salary schedule shall have earned and have provided proof of successful completion (earned grades of "C" or better prior to ratification of this contract, and grades of "B-" or better after the ratification of this contract) of thirty-six (36) previously approved college credits directly related to the content or pedagogy of their assigned responsibilities. Credits earned prior to January 1993, excluding courses already applied to B+15 step, shall not be counted toward the B+36 designation on the salary schedule.

**Only employees who were on Step 11 during the 2010-2011 work year are eligible for Step 11+ and Step 11+ shall be closed to all others.

Berlin Teacher FTE Grid - School Year 2013-2014

	B	B+15	M/B+36	M+15	M+30	M+45	M+60
0							
1			1				
2							
3							
4							
5				1			
6				0.9			
7							
8			0.5	1			
9							
10							
11		1.0		1	1	1.3	1
11+**		1.8	3.3	1	0.2		3.4

2013-2014 Berlin Teachers' Salary Grid

	B	B+15	M/B+36	M+15	M+30	M+45	M+60
0							
1			\$ 50,078				
2							
3							
4							
5				\$ 61,005			
6				\$ 57,739			
7							
8			\$ 33,643	\$ 69,180			
9							
10							
11		\$ 71,364		\$ 77,983	\$ 80,491	\$ 108,299	\$ 86,224
11+**		\$ 129,740	\$ 251,483	\$ 78,763	\$ 16,259		\$ 296,092

Total: **\$ 1,468,343**

APPENDIX A
BOYLSTON ELEMENTARY SCHOOL
TEACHERS' SALARY SCHEDULE
2013-2014

(1% increase to Steps 0-10 inclusive; 1.5% increase to Step 11 only.)

Professional Experience	Bachelor's	Master's	Master's + 15	Master's + 30	Master's + 45
0	\$41,203	\$43,832	\$45,405	\$46,987	\$48,559
1	\$43,039	\$45,675	\$47,247	\$48,823	\$50,400
2	\$44,874	\$47,506	\$49,091	\$50,661	\$52,242
3	\$47,506	\$50,135	\$51,710	\$53,294	\$54,873
4	\$49,940	\$52,983	\$54,624	\$56,278	\$57,942
5	\$51,876	\$55,183	\$56,831	\$58,500	\$60,153
6	\$54,590	\$58,500	\$60,154	\$61,836	\$63,503
7	\$56,542	\$60,721	\$62,387	\$64,069	\$65,718
8	\$58,500	\$62,958	\$64,617	\$66,285	\$67,969
9	\$60,154	\$65,173	\$66,845	\$69,014	\$71,308
10	\$62,116	\$67,416	\$69,628	\$71,850	\$74,097
11	\$65,296	\$71,542	\$73,808	\$76,079	\$78,354

Three semester hours of post-graduate training (approved course) must be taken every third year of employment by the school system in order to qualify for a step increase on the salary scale.

Longevity increment of \$500 dollars will be given according to Article 10, Section E of the Agreement. In order for a teacher to receive a longevity increment after reaching the eleventh step on the salary scale, one of the conditions shall be that the teacher must fulfill the requirement of three semester hours of post-graduate training (with course approval by the Superintendent).

Boylston Teacher FTE Grid - School Year 2013-2014

	B	M	M+15	M+30	M+45
0		1.0			
1					
2		1.0			
3					
4		1.0			
5					
6		2.0			
7					
8		0.3			
9					
10		2.0			
11	6.8	2.7	4.0	0.8	3.5

Boylston Teacher FTE Grid - School Year 2013-2014

	B	M	M+15	M+30	M+45
0		\$ 43,832			
1					
2		\$ 47,506			
3					
4		\$ 52,983			
5					
6		\$ 117,000			
7					
8		\$ 18,887			
9					
10		\$ 134,832			
11	\$ 444,013	\$ 193,163	\$ 295,232	\$ 60,863	\$ 274,239

Total: \$ 1,682,550

Boylston To Berlin Schedule- School Year 2013-2014

	B	M	M+15	M+30	M+45
0		\$ 48,141			
1					
2		\$ 52,000			
3					
4		\$ 56,600			
5					
6		\$ 124,522			
7					
8		\$ 20,186			
9					
10		\$ 144,654			
11	\$ 457,450	\$ 203,723	\$ 311,932	\$ 64,393	\$ 291,575

Total: \$ 1,775,176

Boylston \$ 1,682,550

Cost: \$ 92,626

APPENDIX A

BERLIN-BOYLSTON REGIONAL SCHOOL DISTRICT

TEACHERS' SALARY SCHEDULE

Effective 2013-2014 School Year
(+1.5% Maximum Step Only and +1.25 All Other Steps)

Professional Experience	Bachelor's	Master's	Master's+15	Master's+30	Master's+45
0	\$ 44,238	\$ 46,501	\$ 47,643	\$ 49,915	\$ 51,100
1	\$ 45,936	\$ 48,206	\$ 49,352	\$ 51,618	\$ 52,802
2	\$ 47,643	\$ 49,915	\$ 51,041	\$ 53,307	\$ 54,494
3	\$ 51,041	\$ 53,306	\$ 54,449	\$ 56,728	\$ 57,985
4	\$ 52,744	\$ 55,588	\$ 56,727	\$ 58,997	\$ 60,358
5	\$ 54,449	\$ 57,685	\$ 58,997	\$ 61,264	\$ 62,450
6	\$ 57,857	\$ 61,264	\$ 62,401	\$ 64,680	\$ 65,865
7	\$ 59,555	\$ 63,538	\$ 64,680	\$ 66,940	\$ 68,125
8	\$ 61,264	\$ 65,800	\$ 66,940	\$ 69,216	\$ 70,411
9	\$ 64,014	\$ 68,077	\$ 69,216	\$ 72,055	\$ 73,240
10		\$ 70,342	\$ 72,055	\$ 74,890	\$ 76,076
11		\$ 73,154	\$ 75,450	\$ 78,304	\$ 79,524

Three (3) semester hours of post-graduate training (approved course) must be taken every third year of employment by the school system in order to qualify for step increase on the salary scale.

Longevity increment of \$500 will be given according to Article VII, Section A-7 of the Agreement. In order for a teacher to receive a longevity increment after reaching maximum, one of the conditions shall be that the teacher must fulfill the requirements of three semester hours of post-graduate training (with course approval by the Superintendent).

Per Article VII, Section A-4 of the Agreement, once a teacher reaches the maximum step of the level of Master's Degree plus 30 hours, he/she shall be relieved of the requirement of taking additional course for credit.

Tahanto Teacher FTE Grid - School Year 2013-2014

	B	M	M+15	M+30	M+45
0	1.7				
1	3.0				
2	1.4				
3					
4			1.0		
5	1.0				
6	3.0	1.0			
7	2.0		1.0		
8	1.0				
9	10.0	1.0			
10	X	1.0			
11	X	3.0	6.0	6.0	4.0

Tahanto Teacher FTE Grid - School Year 2013-2014

	B	M	M+15	M+30	M+45
0	\$ 75,205				
1	\$ 137,808				
2	\$ 66,700				
3					
4			\$ 56,727		
5	\$ 54,449				
6	\$ 173,571	\$ 61,264			
7	\$ 119,110		\$ 64,680		
8	\$ 61,264				
9	\$ 640,140	\$ 68,077			
10		\$ 70,342			
11		\$ 219,462	\$ 452,700	\$ 469,824	\$ 318,096

Total: **\$ 3,109,419**

Tahanto to Berlin Schedule- School Year 2013-2014

	B	M	M+15	M+30	M+45
0	\$ 77,828				
1	\$ 143,064				
2	\$ 69,426				
3					
4			\$ 58,481		
5	\$ 55,438				
6	\$ 173,784	\$ 62,261			
7	\$ 119,618		\$ 66,659		
8	\$ 61,663				
9	\$ 635,310	\$ 69,807			
10	X	\$ 72,327			
11	X	\$ 226,359	\$ 467,898	\$ 482,946	\$ 333,228

Total: **\$ 3,176,097**

Tahanto **\$ 3,109,419**

Cost: **\$ 66,678**

Appendix B: Berlin-Boylston Regional Agreement 7-1-13

AGREEMENT BETWEEN THE TOWNS OF BOYLSTON AND BERLIN,
MASSACHUSETTS WITH RESPECT TO THE FORMATION OF A REGIONAL
SCHOOL DISTRICT
EFFECTIVE JULY 1, 2013 (Rev. 1)

This agreement is entered into pursuant to Chapter 71 of the General Laws of Massachusetts, as amended, between the towns of Boylston and Berlin hereinafter sometimes referred to as member towns. In consideration of the mutual promises herein contained, it is hereby agreed as follows:

SECTION I: THE REGIONAL DISTRICT SCHOOL COMMITTEE

(A) Composition

The powers and duties of the regional school district shall be vested in and exercised by a regional district school committee, hereinafter sometimes referred to as the Committee. The Committee shall consist of six members, three from each member town.¹ All members shall serve until their successors are appointed and qualified.

(B) Initial Committee

Within ten days after the establishment of the regional school district, the local school committee of each member town shall appoint from its own membership three members to serve on the Committee, and the six members so appointed shall serve until their successors are appointed and qualified as provided in subsection I (C).

(C) Annual Appointment of Members

Immediately after each annual town election, the local school committee of each member town shall appoint members to serve on the committee. Commencing after the annual election in 1988, three such members shall be so appointed for respective terms of one, two and three years. Thereafter, each year one member shall be so appointed for a term of three years or until a successor is appointed and qualified.²

¹ As amended by votes of Berlin-Boylston Regional School Committee January 13, 1988; Berlin Town Meeting May 2, 1988; and Boylston Town Meeting May 9, 1988.

² As amended by votes of Berlin-Boylston Regional School Committee January 13, 1988; Berlin Town Meeting May 2, 1988; and Boylston Town Meeting May 9, 1988.

(D) Vacancies

If a vacancy occurs in the regional district school committee, the local school committee of the member town involved shall appoint a member to serve for the balance of the unexpired term.³

(E) Organization

Promptly upon the appointment and qualification of the initial members and annually thereafter upon the appointment and qualification of successors, the Committee shall organize and choose by ballot a chairman from its own membership. At the same meeting or at any other meeting the Committee shall appoint a treasurer and a secretary who may be the same person but who need not be members of the Committee, choose such other officers as it deems advisable, determine the terms of office of its officers (except the chairman who shall be elected annually as provided above), and prescribe the powers and duties of any of its officers, fix the time and place for its regular meetings, and provide for the calling of special meetings.

(F) Powers and Duties

The Committee shall have all the powers and duties conferred and imposed upon school committees by law and conferred and imposed upon it by this agreement, and such other additional powers and duties as are specified in Sections 16 to 16-I, inclusive, of Chapter 71 of the General Laws and any amendments thereof or additions thereto now or hereafter enacted, or as may be specified in any other applicable general or special law.

(G) Quorum

The quorum for the transaction of business shall be a majority of the Committee, but a number less than a majority may adjourn.

SECTION II: TYPE OF REGIONAL DISTRICT SCHOOL

Effective July 1, 2013, the regional school district shall be comprised of a middle school program, grades six through eight, and a high school program, grades nine to twelve.⁴ The Committee is hereby authorized, in its discretion, to establish and maintain state-aided vocational education, acting as trustees therefor, in accordance with the provisions

³ As amended by votes of Berlin-Boylston Regional School Committee January 13, 1988; Berlin Town Meeting May 2, 1988; and Boylston Town Meeting May 9, 1988.

⁴ The first sentence was amended by votes of Berlin-Boylston Regional School Committee October 14, 2009; Berlin Town Meeting November 16, 2009; and Boylston Town Meeting November 9, 2009 and, subsequently, further amended, by votes of Berlin-Boylston Regional School Committee August 6, 2012; Berlin Town Meeting November 28, 2012; and Boylston Town Meeting September 24, 2012.

of Chapter 74 of the General Laws and acts amendatory thereof, in addition thereto or dependent thereon.

SECTION III: LOCATION OF THE REGIONAL DISTRICT SCHOOL

The regional district school shall be located within the geographic limits of the District and within a radius of three miles from the intersection of Linden Street and the Boylston-Berlin boundary line.

SECTION IV: APPORTIONMENT AND PAYMENT OF COSTS INCURRED BY THE DISTRICT

(A) Classification of Costs

For the purpose of apportioning assessments levied by the District against the member towns, costs shall be divided into two categories: capital costs and operating costs.

(B) Capital Costs

Capital costs shall include all expenses in the nature of capital outlay such as the cost of acquiring land, the cost of constructing, reconstructing, and adding to buildings, and the cost of remodeling or making extraordinary repairs to a school building or buildings, including without limitation the cost of the original equipment and furnishings for such buildings or additions, plans, architects' and consultants' fees, grading and other costs incidental to placing school buildings and additions and related premises in operating condition. Capital costs shall also include payment of principal of the interest on bonds or other obligations issued by the District to finance capital costs.

(C) Operating Costs

Operating costs shall include costs not included in capital costs as defined in subsection IV (B), but including interest on temporary notes issued by the District in anticipation of revenue.

(D) Apportionment of Capital Costs

Capital costs shall be apportioned for a particular school fiscal year based on each member town's Running Average Percentage for that fiscal year. For the purpose of this section, the following terms shall be defined as set forth herein:

1. A member town's "Tahanto Enrollment Percentage" for a particular fiscal year is the number of that town's resident students enrolled in the regional school district, divided by the total number of resident students of member towns enrolled in the regional

school district, each determined as of October 1 of the prior fiscal year.

2. A member town's "Foundation Enrollment Percentage" for a particular fiscal year is that town's Foundation Enrollment (as defined in M.G.L. Ch. 70, sec. 2, as it may be amended from time to time) as determined by the Massachusetts Department of Education for the prior fiscal year, divided by the total Foundation Enrollment of all member towns for the prior fiscal year.
3. A member town's "Annual Average Percentage" for a particular fiscal year is the sum of its Tahanto Enrollment Percentage plus its Foundation Enrollment Percentage for that fiscal year, divided by two.
4. A member town's "Running Average Percentage" for a particular fiscal year is the sum of its Annual Average Percentage for that fiscal year plus its Annual Average Percentage for each of the three preceding fiscal years, divided by four.⁵

(E) Apportionment of Operating Costs

Operating costs for the first fiscal year next following the establishment of the regional school district and for every fiscal year thereafter shall be apportioned to the member towns on the basis of their respective pupil enrollments in the regional school.⁶ Each member town's share for each calendar year shall be determined by computing the ratio which that town's pupil enrollment in the regional district school on October 1 of the year next preceding the year for which the apportionment is determined bears to the total pupil enrollment from all the member towns in the regional district school on the same date. In the event that enrollment in the regional district school has not been accomplished by October 1 of any year, operating costs shall be apportioned on the basis of enrollment in grades six⁷ through twelve of pupils residing in each member town and receiving education at such town's expense on October 1 of that year.

(F) Times of Payments of Apportioned Costs

Each member town shall pay to the District in each year its proportionate share, certified as provided in subsection V (C), of the capital and operating costs. Except as otherwise provided in subsection V (A), the annual share of each member town shall be paid in such amounts and at such times that at least the

⁵ As amended by votes of Berlin-Boylston Regional School Committee February 12, 2008; Berlin Town Meeting May 5, 2008; and Boylston Town Meeting May 4, 2008.

⁶ As amended by votes of the Berlin-Boylston Regional School Committee January 24, 1973; Berlin Town Meeting May 6, 2013; and Boylston Town Meeting May 6, 2013.

⁷ As amended by votes of Berlin-Boylston Regional School Committee August 6, 2012; Berlin Town Meeting November 28, 2012; and Boylston Town Meeting September 24, 2012.

following percentages of such annual share shall be paid on or before the dates indicated, respectively:

April 1	25%
June 1	50%
September 1	75%
December 1	100%

SECTION V: BUDGET

- (A) Within sixty days after the original Committee is organized, it shall prepare a reasonably detailed operating and maintenance budget covering expenses, if any, for the balance of the then calendar year. Copies of such proposed budget shall be submitted to the Chairman of the Finance or Advisory Committee of each member town, or if there is no Finance or Advisory Committee in a member town, to the Chairman of the Board of Selectmen of such town, for its consideration. A budget shall be adopted not earlier than fourteen days but within thirty days after the proposed budget has been so submitted. The amount of the said budget shall be apportioned between the member towns according to the provisions of Section IV hereof. The treasurer shall certify to each member town its respective share of said budget. The sums thus certified shall be payable forthwith by each member town to the Committee but only from funds which may be or may have been appropriated by each member town for such purpose.

(B) Tentative Maintenance and Operating Budget

Thereafter, on or before November 1, the Committee shall annually prepare a tentative maintenance and operating budget for the ensuing calendar year, including therein provision for any installment of principal or interest to become due in such year on any bonds or other evidence of indebtedness of the District and any other capital costs to be apportioned to the member towns in such year. The said budget shall be in reasonable detail, including the amounts payable under the following classifications of expenses and such other classifications as may be necessary:

1. General Control
2. Expenses of Instruction
3. Operation of Plant
4. Maintenance of Plant
5. Auxiliary Agencies
6. Outlay
7. Debt Service
8. Cost of Transportation
9. Special Charges

Copies of such tentative budget shall be mailed on or before November 5 to the Chairman of the Finance or Advisory Committee of each member town; or if there is no Finance or Advisory Committee in a member town, to the Chairman of the Board of Selectmen of such town.

(C) Budget Hearing and Adoption of Budget

Prior to November 20, the Committee shall hold a public hearing in the District at which it shall present the proposed regional school district tentative budget and shall answer any reasonable inquiries with respect thereto. The committee shall cause a notice of the aforesaid public hearing, stating the time, place and purpose thereof, to be posted in at least two public places in each town at least seven (7) days in advance of the meeting and to be mailed to each postal box holder in each member town, but failure to give notice as herein prescribed shall not invalidate the proceedings for adopting a budget. The Committee shall adopt an annual maintenance and operating budget on or before December 1, including debt and interest charges as a separate item, for the ensuing calendar year, and the said Committee shall apportion the amounts necessary to be raised in order to meet the said budget in accordance with the provisions of subsections (D) and (E) of Section IV. The amounts so apportioned for each member town shall, prior to December 31 of each year preceding the calendar year to which said budget relates, be certified by the district treasurer to the treasurers of the member towns, and each town shall appropriate the amounts so certified.

SECTION VI: TRANSPORTATION

School transportation shall be provided by the regional school district and the cost thereof shall be apportioned to the member towns as an operating cost.

SECTION VII: AMENDMENTS

(A) Limitation

This agreement may be amended from time to time in the manner hereinafter provided, but no amendment shall be made which shall substantially impair the rights of the holders of any bonds or notes or other evidences of indebtedness of the District then outstanding, or the rights of the District to procure the means for payment thereof, provided that nothing in this section shall prevent the admission of a new town or towns to the District and the reapportionment accordingly of capital costs of the District represented by bonds or notes of the District then outstanding and of interest thereon.

(B) Procedure

Any proposal for amendment, except a proposal for amendment providing for the withdrawal of a member town (which shall be acted upon as provided in Section IX), may be initiated by a majority vote of all the members of the Committee or by a petition signed by 10% of the registered voters of any one of the member towns. In the latter case, said petition shall contain at the end thereof a certification by the Town Clerk of such member town as the number of registered voters in said town according to the most recent voting list and the number of signatures on the petition which appear to be the names of registered voters of said town and said petition shall be presented to the secretary of the Committee. In either case, the secretary of the Committee shall mail or deliver a notice in writing to the Board of Selectmen of each of the member towns that a proposal to amend this agreement has been made and shall enclose a copy of such proposal (without the signatures in the case of a proposal by petition). The Selectmen of each member town shall include in the warrant for the next annual or a special town meeting called for the purpose an article stating the proposal or the substance thereof. Such amendment shall take effect upon its acceptance by all of the member towns, acceptance by each town to be by a majority vote at a town meeting as aforesaid.

SECTION VIII: ADMISSION

By an amendment of this agreement adopted under and in accordance with Section VII above, any other town or towns may be admitted to the Regional School District upon adoption as therein provided of such amendment and upon acceptance by the town or towns seeking admission of the agreement as so amended and also upon compliance with such provisions of law as may be applicable, and such terms as may be set forth in such amendment.

SECTION IX: WITHDRAWAL

(A) Limitations

The withdrawal of a member town from the District may be effected by an amendment to this agreement in the manner hereinafter provided by this section. Any member town seeking to withdraw shall, by vote at an annual or special town meeting, request the Committee to draw up an amendment to this agreement setting forth the terms by which such town may withdraw from the District, provided (1) that the town seeking to withdraw shall remain liable for any unpaid operating costs which have been certified by the district treasurer to the treasurer of the withdrawing town, including the full amount so certified for the year in which such withdrawal takes effect and (2) that the said town shall remain liable to the District for its share of the indebtedness, other than temporary debt in anticipation of revenue, of the District outstanding at the time of such withdrawal,

and for interest thereon, to the same extent and in the same manner as though the town had not withdrawn from the District, except that such liability shall be reduced by any amount which such town has paid over at the time of withdrawal and which has been applied to the payment of such indebtedness.

(B) Procedure

The clerk of the town seeking to withdraw shall notify the Committee in writing that such town has voted to request the Committee to draw up an amendment to the agreement (enclosing a certified copy of such vote). Thereupon, the Committee shall draw up an amendment to the agreement setting forth such terms of withdrawal, as it deems advisable, subject to the limitation contained in subsection VII (A). The secretary of the Committee shall mail or deliver a notice in writing to the Board of Selectmen of each member town that the Committee has drawn up an amendment to the agreement providing for the withdrawal of a member town (enclosing a copy of such amendment). The Selectmen of each member town shall include in the warrant for the next annual or a special town meeting called for the purpose an article stating the amendment or the substance thereof. Such amendment shall take effect upon its acceptance by all the member towns, acceptance by each town to be by a majority vote at a town meeting as aforesaid.

(C) Cessation of Terms of Office of Withdrawing Town's Members

Upon the effective date of withdrawal the terms of office of all members serving on the regional district school committee from the withdrawing town shall terminate and the total membership of the Committee shall be decreased accordingly.

(D) Apportionment of Capital Costs after Withdrawal

The withdrawing town's annual share of any future installment of principal and interest on obligations outstanding on the effective date of its withdrawal shall be fixed at the percentage prevailing for such town at the last annual apportionment made next prior to the effective date of the withdrawal. The remainder of any such installment after subtracting the shares of any town or towns which have withdrawn shall be apportioned to the remaining member towns in the manner provided in subsection IV (D).

(E) Payments of Certain Capital Costs Made by Withdrawing Town

Money received by the District from the withdrawing town for payment of funded indebtedness or interest thereon shall be used only for such purpose and until so used shall be deposited in trust in the name of the District with a Massachusetts bank or trust company having a combined capital and surplus of not less than \$5,000,000.

SECTION X: STUDENTS

(A) Students Entitled to Attend the Regional School District

The regional district school shall accept all children who reside in the District and who have completed the fifth⁸ grade. Any student residing in a member town who is desirous of attending a trade or vocational school outside the District shall have all the privileges of attending such a school as are now or may be hereafter provided for by law and the cost of tuition for attending such a school shall be borne by the town wherein the student resides.

(B) Permission to Certain Students to Attend High Schools Outside the District

At the discretion of the local school committee, any member town in which reside students who attend high school outside the District on a tuition basis at the time the regional district school is opened may continue on a tuition basis such of those students who in ordinary course would be graduated within one year from the time the regional district school is opened.

(C) Admission of Pupils Residing Outside the District

The Committee may accept for enrollment in the regional district school pupils from towns other than the member towns on a tuition basis and on such terms as it may determine.

SECTION XI: EMPLOYMENT OF TEACHERS AND EXTENSION OF TENURE

All teachers in positions to be superseded by the establishment and operation of the Regional School District shall be given preferred consideration for similar positions in the Regional District School to the extent that such positions exist therein. Any such teacher who on the date of his contract of employment with the District is then on tenure shall continue thereafter to serve on a tenure basis.

SECTION XII: JURISDICTION

The establishment of the regional school district shall not affect the obligation of the member towns to provide education in grades seven through twelve, inclusive, until such time as the Committee shall assume jurisdiction.

⁸ As amended by votes of Berlin-Boylston Regional School Committee August 6, 2012; Berlin Town Meeting November 28, 2012; and Boylston Town Meeting September 24, 2012.

SECTION XIII: ADVISORY BUILDING COMMITTEE

The regional district school committee shall appoint an unpaid advisory building committee to consist of at least six persons, with equal representation from each member town to advise the regional district school committee in matters pertaining to the planning and construction of the initial school building. Such advisory building committee shall be dissolved when the initial school building has been completed and accepted by the regional district school committee.

SECTION XIV: FISCAL YEAR AND TIMES OF PAYMENT OF APPORTIONED COSTS

The fiscal year or period of the District shall be the same as the fiscal period of the member towns as provided by law, and the word “year” or “fiscal year” as it relates in this Agreement to a fiscal or budget year shall mean the fiscal year of the District.

Notwithstanding the provisions of Section IV, par. F of this Agreement, the dates on or before which the respective percentages of the annual share of costs of the District apportioned to each member town shall be paid shall be as follows:

July 1	16 2/3%	January 1	66 2/3%
September 1	33 1/3%	March 1	83 1/3%
November 1	50%	May 1	100%

provided, however, that for the fiscal period beginning January 1, 1973 and ending June 30, 1974, the dates on or before which the respective percentages of the cost of the District for said period apportioned to each member town shall be paid shall be as follows:

April 1	16 2/3%	December 1	66 2/3%
June 1	33 1/3%	March 1	83 1/3%
September 1	50%	May 1	100%

This section shall be effective only to the extent that Chapter 849 of the Acts of 1969 as amended shall be in effect.⁹

As voted originally November 16, 1959 and subsequently amended as noted.

⁹ As amended by votes of Berlin-Boylston Regional School Committee January 24, 1973; Berlin Town Meeting May 6, 2013; and Boylston Town Meeting May 6, 2013.