



---

# BERLIN-BOYLSTON REGIONAL SCHOOL COMMITTEE HANDBOOK

Berlin-Boylston Regional School Committee  
215 MAIN STREET, BOYLSTON, MA 01505 | UPDATED 12/14/2020

# Berlin-Boylston Regional School Committee Handbook

Updated 12/14/2020

## Table of Contents

Mission Statement.....	Page 1
Current Membership .....	Page 2
Our Norms and Standards.....	Page 2-4
Officers.....	Page 4-5
Meetings/Agenda.....	Page 5-6
New Member Orientation.....	Page 6-7
Duties of the School Committee.....	Page 7
Communication/Correspondance.....	Page 7-8
Social Media Guidance from MASC.....	Page 8-11
Subcommittees.....	Page 11-12
Moses Reed Tyler Scholarship.....	Page 12-13
Marion Hoffman Award.....	Page 13
Regional Agreement.....	Page 14
M.A.R.S.....	Page 14
Financial Terms/definitions.....	Page 14-21
School Committee Goals 2020-21.....	Page 21-22

## Mission and Vision

**Our Mission:** To support and challenge all students to achieve personal and academic excellence in a student-centered environment.

**Our Vision:** The Berlin-Boylston Public Schools will create a challenging learning environment to ensure that all students exhibit continuous improvement and pursue personal excellence and become active, engaged, independent learners and decision makers. As an inclusive school community, instruction will be provided in a caring, safe and healthy learning environment, responsive to each student, in collaboration with families and the community.

## School Committee Roster 2020-2021

Mr. James Spencer, Chair, Term Expires 5/11/2021; 439 School Street Boylston, MA 01505; 508-304-4409, [jspencer@bbrsd.org](mailto:jspencer@bbrsd.org)

Mrs. Lori-Anne Hart, Term Expires 5/11/2021; 194 Central Street Boylston, MA 01505; 508-869-6319 (home), 508-223-7599 (cell), [lhart@bbrsd.org](mailto:lhart@bbrsd.org)

Dr. Susan Henry, Vice Chair, Term Expires 5/11/2021; 28 Summer Road Berlin, MA 01503; 978-838-2985 (home) 508-335-2493 (cell), [shenry@bbrsd.org](mailto:shenry@bbrsd.org)

Mr. Keith Lewis, Secretary, Term Expires 5/11/2021; 72 Nicholas Avenue Boylston, MA 01505; 508-380-3975, [klewis@bbrsd.org](mailto:klewis@bbrsd.org)

Mr. Michael Totman, Term Expires 5/11/2021; 52 Derby Road, Berlin MA 01503; 508-386-5000; [mtotman@bbrsd.org](mailto:mtotman@bbrsd.org)

Mrs. Angela Yildiz Term Expires 5/11/2021; 5 Marlboro Road Berlin, MA 01503; 978-660-1033 (cell), [ayildiz@bbrsd.org](mailto:ayildiz@bbrsd.org)

Student Liaison, TBD, [@student.bbrsd.org](mailto:@student.bbrsd.org)

Recording Secretary: Kristi Turgeon 1 Holbrook Lane Paxton, MA 01612; 508-869-2837 ext. 1107 443-221-1348 (cell) [kturgeon@bbrsd.org](mailto:kturgeon@bbrsd.org)

### SUBCOMMITTEE ASSIGNMENTS

- Policy Subcommittee: Susan Henry, Michael Totman
- Members to Approve Warrants and Payroll: Angela Yildiz, Keith Lewis (alternate)
- Berlin-Boylston Regional Personnel Subcommittee for Negotiations: Non-collective bargaining year
- Assistant Treasurer: Angela Yildiz

## **Norms and Standards**

### **SCHOOL COMMITTEE: NORMS AND STANDARDS**

The School Committees acknowledges that a School Committee meeting is a meeting of School Committee members that is held in public and not a public meeting and that we will make every effort to ensure that meetings are effective and efficient. To that end, we acknowledge the importance of subcommittees and we and the superintendent agree to utilize them to focus on specific topics in-depth and to prepare for presentation, deliberation, and possible action by the School Committee.

The School Committee sets forth these Standards and Norms that we will all commit to abide by as individuals and as a committee:

1. The Superintendent and the School Committee represent the needs and interests of **all** students in the district and place their interests above all others in the decisions we make.
2. Exercise leadership in vision, planning, policy making, evaluation, and advocacy on behalf of the students and district, **not** in managing the day-to-day operations of the district.
3. It is the School Committee's responsibility to set the tone for the entire system and make every effort to promote a positive image for our school system. We will operate respectfully, maintain confidentiality, and respect the Open Meeting laws.
4. We acknowledge that a School Committee meeting is a business meeting of the School Committee that is held in public – not a public meeting. We will make every effort to ensure that meetings are effective and efficient by conducting our business through a set agenda. Emerging items will be addressed in subsequent meetings through agenda items.
5. We shall work to build trust between and among School Committee members, the Superintendent, and the administration by treating everyone with dignity and respect, even in times of disagreement by maintaining an open environment where each member is empowered to freely express opinions, concerns, and ideas without being made to feel uncomfortable.
6. Keep an open mind in order to make decisions with the best information available at the time, considering data, the superintendent's recommendations, proposals, and suggestions and not on personalities.
7. Debate the issues, not one another. The committee will engage in critical thinking, expecting all committee members to freely offer differing points of view as part of the discussion, prior to making a board decision.
8. School Committee members will not take unilateral action and agree to recognize and respect that their authority exists only when a quorum of the Committee meets. A committee member's authority is derived only through a majority decision of the committee acting as a whole during an open, public meeting.
9. The School Committee Chair or his/her designee and the Superintendent will represent the positions of the School Committee to the media or other public bodies.
10. Attend meetings well prepared to discuss issues on the agenda and will be prepared to make decisions, striving for efficient decision making.
11. Strive to have no surprises for the committee or superintendent at School Committee meetings.

12. **All** members will receive the same information on **all** topics from the Administration in a timely manner.
13. Strive to reach decisions by consensus. Discuss with respect, disagree without acrimony. When consensus is not possible, all members will publicly abide by the majority decision. Once the School Committee has taken action, School Committee members will support the official position of the School Committee.
14. Understand and respect the chain of communication as it concerns roles and responsibilities and direct others to do the same.
15. Review and revise our standards and norms, as needed, as part of the committee's self-evaluation. We recognize the importance of honoring our norms and beliefs, and we agree to take responsibility for respectfully reminding one another when we get off track.
16. Refer to Policy BHE for School Committee use of electronic messaging.

## **Officers**

**Chair** - In addition to all duties of a committee member the chair also carries out the following duties:

- Sign documents necessary to carry out state requirements or the will of the committee.
- Develop school committee agendas with the Superintendent.
- Confer with the superintendent on matters of importance between committee meetings as necessary.
- Spokesperson for the committee unless another is appointed or designated.
- Appoint subcommittee members.
- Preside over and run orderly school committee meetings
  - Call the meeting to order
  - Announce the business of the meeting and follow the order of the agenda.
  - Enforce policies related to conduct of meetings
  - Recognize those who wish to speak and protect speakers from disturbance/interference
  - Put motions to a vote and explain the vote and what it would mean to members if unclear.

**Vice Chair** - In the absence of the Chair, the Vice Chair will preside over committee meetings or other duties as necessary.

**Secretary** - The Administrative Assistant to the Superintendent, Kristi, takes notes of meetings and prepares minutes for approval; the secretary signs all approved minutes and other documents as necessary.

**ASSISTANT TREASURER** - signs checks for the school district in the absence of the district treasurer, Joseph Meichelbeck. The treasurer and assistant treasurer are bonded and insured by the school district.

## **Meetings/Agendas**

Meetings are generally the 2nd Tuesday of the month with an “as needed” date held for the final Tuesday of the month for governance workshops or timely business items that necessitate a meeting. Meetings usually begin at 6:30 pm.

The chair, in consultation with the superintendent, and administrative assistant maintains and updates an annual working calendar with meeting dates, report schedules, and business topics. This calendar is available on the shared google drive or link listed below.

The chair, superintendent, and administrative assistant confirm agenda items prior to each meeting and the assistant publicly posts the meeting agenda prior to 48 business hours before the meeting (ie. Thursday @ noon posting for a Tuesday evening meeting). Items on the agenda, include a listing of topics which the chair reasonably anticipates will be discussed during the meeting per open meeting law Ch.30A, Sec. 20.

Any school committee member or member of the public may request an item be placed on a future meeting agenda; it is at the discretion of the chair and superintendent to add requested items to a future agenda.

“Statute requires that all meetings, except those conducted in executive sessions, shall be open to the public and the media. Except in an emergency, a notice of each meeting shall be posted at least 48 hours before the meeting. Emergency meetings may be held only when a sudden, unexpected occurrence or set of circumstances makes immediate action imperative.

A school committee may only meet in executive session in accordance with the requirements of the Open Meeting Law. (See Chapter 30A, Section 21 of the Massachusetts General Laws).

All votes must be by voice or roll call, except in executive session when votes must be by roll call. Secret ballots are never permitted.

The law further requires that the committee maintain accurate records of the actions taken. The records of each meeting become public records; the only exception is records of executive sessions which may be held secret as long as publication would defeat the lawful purpose of the executive session. A request for a copy of the public record must be honored. A reasonable charge may be assessed for any such copy.

The law provides that no person shall address the meeting without permission of the presiding officer. Any person interfering with the orderly conduct of the meeting may be

removed if s/he fails to comply with the request of the chair to be silent.” (MASC Member Handbook)

## [School Committee Working Meeting Calendar](#)

### **New Member Orientation**

Once a new committee member is sworn in by the town clerk that member can fully participate in meetings and the powers/duties of a school committee member.

New School Committee members are required to take an online ethics/conflict of interest training as soon as possible. That training is here: <https://www.mass.gov/how-to/complete-the-online-training-program-for-municipal-employees>

Participants can print a copy of the certificate of completion and give or e-mail it to their town clerk.

The law requires 8 hours of training during the first year in office for new school committee members. MASC (MA Association of School Committees) is the approved provider of the training through “Charting the Course.” The cost of the training is covered by the school district and you can register on-line and find a convenient date/location by visiting [www.masc.org](http://www.masc.org). Kristi, our administrative assistant, can also assist you with registration if you prefer.

Kristi also notifies MASC of new school committee members so new members should begin receiving e-mail and/or mail correspondence regarding upcoming events and legislative bulletins etc. within the first month or so of your term.

Here are some other ways to help ease into learning your job:

1. Make an appointment with the Superintendent and/or Chair to discuss the school district, your role, and answer questions you may have.
2. Seek out a committee member to serve as an informal mentor or the chair can appoint one, if requested.
3. Register on the MASC website [www.masc.org](http://www.masc.org) and if desired, join the LISTSERV for e-mail online forum of member questions.
4. Review our district policy regarding new members: [Orientation Policy](#)

## Duties of the School Committee

“There are four ‘sacred’ duties that a school board must fulfill. If a board does not perform these duties, no one else can. No other entity and no single person, not even a talented superintendent, can discharge the board’s duties as effectively as a school board. The board’s duties are:

1. Establish and promulgate ownership of the district’s vision and values.
2. Articulate expected district results and monitor progress.
3. Create the conditions for achievement of the district’s vision, values and expected results through effective use of the five areas of board authority - “board tools:”
  - Promulgation of policies;
  - Governing the use of their community’s fiscal resources for education;
  - Engaging the community in its schools;
  - Sustaining an effective board-executive relationship;
  - Negotiating and approving union contracts.
4. Ensure a community-wide climate of commitment, respect and trust.”<sup>1</sup>

The school committee appoints the Superintendent by affirmative majority vote, who reports directly to the committee. The committee also appoints, at the recommendation of the Superintendent, the Director of Finance and Operations, Director of Pupil Personnel Services, School Physician and School Nurses (these individuals shall not report directly to the school committee).

## Communication/Correspondance

### Protocol for committee member communication with staff other than the superintendent:

If a committee member wishes to speak with a member of the central office staff or administration about school related business the member should arrange for this

---

<sup>1</sup> *Doing the Right Thing: The Panasonic Foundation’s Guide for Effective School Boards*, Mitchell, Gelber, Sa, & Thompson.

conversation/meeting through the Superintendent. If someone wishes to ask questions about the budget, for example, the member should contact the Superintendent to arrange for this.

Committee members who are parents, of course, have a relationship with their child(ren)'s school and have many reasons to be talking with school personnel. So committee members not acting as committee members have no conflict.

**Protocol for e-mail communication received from members of the community:**

When committee members receive email communication about an issue, the email should be forwarded to the Committee Chair for response. It has been our practice that the Committee Chair is the one responsible for replying to the email (or letter). We want writers to have a prompt reply from the Chair.

[Electronic Communications Policy](#)

**Guidance from MASC on Social Media:**

**Social Media for School Committee members**

The MASC Code of Ethics states a member stays “well informed concerning the duties of a Committee member on both a local and state level.” Social media can be another tool for carrying out this part of your position.

The following guidelines are suggested to inform your use of social media:

**Use social media as a communication tool.**

As a well-informed school committee member, you're constantly in communication about your district: gathering information to inform decisions, delivering information to inform constituents. Much of that communication now takes place online. You certainly may use social media as a means of communication as a member of a school committee.

**Be clear that you communicate only as an individual.**

In Massachusetts, school committee members individually have no authority to speak on behalf of the district or of the committee unless specifically designated to do so. Be sure that it is clear in statements online and elsewhere that you speak only as an individual.

### **Avoid violating the Open Meeting Law.**

Recall that the Open Meeting Law (M.G.L. Ch. 30A, §§ 18-25) applies to any quorum of a body deliberating about any matter under their jurisdiction.

Online, this can be as innocuous as a post from a single committee member expressing a view regarding an upcoming decision which is then “liked” by a majority of other members of the committee. While you may well be connected through social media to other members of your committee, be very cautious in your interactions with other members of your committee.

### **Keep your deliberations within the meeting.**

Remember that the MASC Code of Ethics for members states “a member should not make statements or promises of how he/she will vote on matters that will come before the Committee.” Your decision should be made as a result of meeting deliberation. Avoid posting content that indicates that you have already formed an opinion ahead of a deliberation at a meeting.

### **Make your decisions within the meeting.**

While you may use social media as one way of gathering input for upcoming decisions, you have a responsibility as a committee member to make your decisions based on information given to you for your deliberation. A committee member should not make decisions based on social media popularity.

### **Direct complaints or concerns to the appropriate channels.**

Just as you would with a phone call or a conversation in person, ensure that complaints and concerns are directed through the chain of command to the appropriate person in the administration.

### **Share public information through social media.**

Sharing information about your district is a valuable function of social media. Invite the public to upcoming district events; share information about public hearings; link to the district budget. Let the community know about decisions the committee has made. Use visuals—photos, charts, graphs— to make your news go viral. Be clear in your sharing of information that you do so as a single committee member; you are not the official keeper of records.

### **Keep privileged information private.**

Information shared within executive session needs to be kept private unless and until it is reviewed and released as part of the minutes of the session per M.G.L. Ch. 30A, §22f.

**Observe other applicable laws and regulations around the sharing of information.**

Be certain to observe all other applicable laws, such as those surrounding student privacy. This applies not only to information about students, but also to their images. Be sure that public sharing of photos of students are covered by district release.

**Consider the permanence of posting.**

Remember that nothing ever disappears online; postings can be cached or captured by screenshot. Likewise, whatever privacy setting you've chosen, a screenshot can take anything public. Do not post anything on social media that is not appropriate to have publicly shared.

**Stay with facts.**

Should you see incorrect information in a post and have public district information that is correct, link to it in the comments. Do not, however, get into an extended back-and-forth, as those rarely lead to any place productive. The "turn off notifications" setting can be very useful here.

**Stay professional.**

Never, never post in anger.  
Ever.

Don't get personal in your remarks, whatever the provocation.

**Be aware of recent federal court rulings regarding social media as a "designated public forum."**

There have been several recent rulings in federal court that elected officials may not within a public forum block those with whom they disagree politically. This is still a developing area legally. Every member must balance this with the respect for the administration, the community, and other members which are the MASC Code of Ethics; abuse of others within your own posts should not be allowed.

**Ensure you abide by your district’s technology use policy if using district equipment.**

If you have been issued a district phone, laptop, or tablet, be certain you adhere to use as directed by policy.

**Be timely and truthful.**

Both make you an excellent and trusted resource online, extending your service as a member of the school committee online.

MASC updated July  
2018

## **Subcommittees**

Subcommittees help the committee make the most efficient use of its time.

Subcommittees are less than a quorum of members, usually appointed by the chair, and meet for a specific purpose or objective. Subcommittees must abide by open meeting law, (meeting is posted, held in a public place, and no deliberation outside of the meeting). Subcommittees bring recommendations for approval to the full committee.

Advisory committees are created by the committee but may include parents, community members and faculty. Advisories are formed for a specific purpose and then dissolve when the purpose is complete. At the moment, no advisory committees are in use.

Currently our committee has the following subcommittees:

**POLICY** - Reviews existing policies for changes and updates, revises language as needed, and presents updated policies for review and approval to the school committee. Recommendations for policies to be reviewed/updated usually come from MASC, but the superintendent, committee members or community members at large may also request a policy be reviewed for revisions.

Policies are usually presented to the school committee twice, first for a “First Read” where committee members can voice corrections/comments and then for a “Vote,” at a subsequent meeting. Members of the committee may waive the first read or delay a vote by a majority vote of the committee.

Current policy sub-committee members are Susan Henry and Michael Totman (2021)

The Berlin-Boylston Regional School Committee policy manual:

<https://z2policy.ctspublish.com/masc/browse/berlinboylstonset/berlinboylston/root>

**PERSONNEL SUBCOMMITTEE FOR NEGOTIATIONS** - Works with collective bargaining units to negotiate a successor teacher contract, keeps committee apprised of progress and recommends final agreement.

Current personnel subcommittee members are Jim Spencer and Angela Yildiz

The current collective bargaining agreement can be found [here](#) .

**EVALUATION (Superintendent and School Committee)** - Assists in ensuring timeline for evaluation of the superintendent and school committee is followed. Compiles evaluations for review by the committee.

Current evaluation sub-committee members are Susan Henry and Lori Anne Hart

**APPROVE WARRANTS AND PAYROLL** - All members sign warrants and payroll during meetings. However, an appointed member or alternate may approve and sign warrants between meetings in which case copies of the warrants will be included in meeting packet material.

Current members are Angela Yildiz and Keith Lewis.

**MOSES REED TYLER SCHOLARSHIP** - This scholarship is available for Berlin residents who have been students educated in at least one of the Berlin member Public Schools (BMS, Tahanto, Assabet Valley Voc. Tech). A Berlin member is appointed to lead this sub-committee, who usually recruits two Berlin community members to serve as part of the sub-committee. Recommendations for awards are submitted to the school committee for approval.

Moses reed documents can be found here [Moses Reed Tyler Guidance Document](#)

The current trust officer:

**Maria Menard Pitney**

Trust Officer

T 508-926-3469 | [mpitney@bowditch.com](mailto:mpitney@bowditch.com)

Current subcommittee chair is Susan Henry.

**MARION HOFFMAN AWARD** - This pertains to BMS only and is a trust fund, held by the town of Berlin, given by the Hoffman Family in honor of Marion Hoffman, who was an active volunteer and lover of books. One student, per 5th grade class, who displays volunteerism and/or is an avid reader, is awarded the “Marion Hoffman Award” at 5th Grade Recognition in June. The recipient is chosen by their teacher.

Usually one member from Berlin is appointed to complete the following tasks:

- Check with town accountant, June Poland, for amount of money in account (not necessary to do this every year)
- Recommend dollar amount to award and request vote for approval from school committee.
- Order gift (in the past we have purchased a \$25.00 Amazon gift card).
- Drop off gift/congratulatory card to BMS secretary and inform 5th grade teachers via email.
- Submit request for reimbursement letter and copy of receipt to town administrator who will mail reimbursement check to school committee member (reimbursement directly w/ town is a new process since regionalization).

## Regional Agreement

Our school district is a regional school district established under our regional agreement. Any changes or amendments to the regional agreement must first be voted by the school committee and then voted for approval by both member towns during a town meeting. Our regional agreement is [here](#).

## M.A.R.S.

Massachusetts Association of Regional Schools (MARS) supports regional school districts in our state. Monthly general meetings are held with opportunities for professional development and legislative updates provided during the year. Our district is a MARS member and meetings are open to Superintendents, Business Directors, and School committee members. In the past, the school committee has appointed a

delegate to attend MARS meetings but this has not occurred in recent years.  
[www.massassociationregionalschools.org](http://www.massassociationregionalschools.org)

## Financial Terms

**Accounts Payable Warrant:** In financial transactions, a **warrant** is a written order from a first person that instructs a second person to pay a specified recipient a specific amount of money/goods at a specific time. For oversight reasons, the SCOM must sign warrants to show they have been reviewed and approved.

**Appropriating Authority:** Those with the exclusive right to give orders and make decisions. In our district, the appropriating authorities are Berlin and Boylston.

**Assessment:** In a regional school district, the portion of money towards the budget or capital expense each town is requested to pay.

**Audit - Financial Statements:** The official inspection of a regional district's accounts by an independent audit firm (district's audit firm is Powers and Sullivan). This is conducted annually. In addition, Quarterly Reports are shared by the Director of Finance and Operations to show payments, spending, deficits, and transfers from line items.

**Budget Report:** A quarterly summation of the district's spending to date, compared to budgeted cost. This highlights surpluses and expected shortages, allowing for adjustments.

**Capital Budget:** Typically derived from the Capital Plan, it is the part of the plan that is funded within a specific fiscal year budget, and is funded via the capital assessment to the Towns. The Tahanto Debt Assessment is part of the district's Capital Budget.

**Capital Plan:** Identifies the anticipated needs of capital improvement to plan for funding. Assessments can be done by outside companies to give multi-year projections of expected needs and maintenance to better plan for these large budget items. Sometimes they require attention sooner than anticipated (ex. Leaking roof).

**Chapter 70:** The major program of state aid to public elementary and secondary schools. In addition to providing state aid to support school operations, it also establishes minimum spending requirements for each school district and minimum

requirements for each municipality's share of school costs.<sup>2</sup> This is the state's portion of district funding, based on specific parameters, such as a town's wealth, income, and property values. The formula is updated every few years but the current formula states that the town must pay 82.5% of the cost with Chapter 70 paying 17.5%. The 82.5% is the most that a town is required to pay. Both Berlin and Boylston are "minimum aid" districts, meaning that the state provides them only with the minimum level of aid required, based on the formula, which factors in overall wealth and income for the community.

**Cherry Sheet:** The Commissioner of Revenue must provide annual cherry sheet estimates, which are the best estimate of expected state aid and assessments. Boards of Assessors are required to use these estimates in determining their local budgets.<sup>3</sup> The cherry sheet is a projection of revenue from the state.

Current and past cherry sheets found [here](#).

**Circuit Breaker:** Reimbursement from the state for excess Special Education Funds. This is done on a per student basis. If the cost is more than four times the average cost per pupil, the school will be reimbursed by the state for approximately 75% of the cost, although that percentage can vary depending on availability of funds. The Student Opportunity Act (SOA) includes new aspects to this program, such as including Special Education transportation into the calculation. The SOA is being instituted over the next few years; FY21 will be the first phase. Funding availability due to the current economic situation in the state may alter the scheduled timeline for implementation.

**Competitive Grant:** Grant with specific proposal requirements that must be met. The grants are competitive in that the submission does not *ensure* monetary award; rather, the grant will be "competing" with others for the allotted grant money. An example of this is the high school's walkie-talkie purchase, financed by the Public Safety Grant.

**Contractual Obligations:** Money that must be spent on state or district required items. Examples are professional development, transportation, salaries, etc.

**Discretionary Budget Items:** Non-essential or required spending. Examples of this are curriculum materials, supplies, some repairs, and maintenance.

---

<sup>2</sup> "Chapter 70 Program - School Finance." <http://www.doe.mass.edu/finance/chapter70/>. Accessed 10 Mar. 2020.

<sup>3</sup> "Cherry Sheet Estimates, Local Aid Payments and ... - Mass.gov." <https://www.mass.gov/service-details/cherry-sheet-estimates-local-aid-payments-and-municipal-revenue-growth-factors-mrgf>. Accessed 10 Mar. 2020.

**Encumbrance:** A reservation against the budget for financial commitments made by the District. In most cases, it is with precise, anticipated spending, such as salaries and Purchase Orders. In some cases, estimates are used; for example, a PO is generated for the estimated annual cost of electricity. Typically estimates are avoided, except in cases where there is certainty that an expense will occur, and some reasonable estimate of cost can be made.

**Entitlement Grant:** Guaranteed funds upon proposal submission. They are not competitive and are offered by the federal government. Examples include the SPED IDEA grant, Title I grant, Title IIA grant and Title IV grant.

**Excess and Deficiency Fund (E & D Account):** This reserve account is where surplus funds from prior year budgets are kept. MA Dept. of Revenue must certify the fund each year. Through its annual budget process, the District can vote to use a portion of E&D funds to fund its annual budget. In order to access this money for payment, approval of the School Committee and town is required. E&D is capped at 5% of the total budget (operating + capital).

**Federal Grants:** Funds from the government to support school programs such as Title 1, Special Education, etc. These must be used in accordance with the terms, conditions, purpose, and restrictions listed in the grant.

**FinCom:** The Finance Committee, who oversee the financial planning of a town. They provide guidance to the Select Board by advising/making recommendations on town spending.

**Fixed Costs:** Legally or contractually mandated costs such as retirement, FICA/Social Security, insurance, building, staff, and debt service costs. <sup>4</sup>

**Foundation Budget:** The spending target imposed by the Education Reform Act of 1993 for each school district as the level necessary to provide an adequate education for all students.<sup>5</sup> This budget is determined by student population and state issued guidelines on per pupil expenditures, with increments for certain factors (EL learners, low income, special ed).

---

<sup>4</sup> "Municipal Finance / Budget Glossary | Ashland, MA." <https://www.ashlandmass.com/278/Municipal-Finance-Budget-Glossary>. Accessed 13 Mar. 2020.

<sup>5</sup> "Municipal Finance / Budget Glossary | Ashland, MA." <https://www.ashlandmass.com/278/Municipal-Finance-Budget-Glossary>. Accessed 13 Mar. 2020.

**Levy** – The amount a community raises through the property tax. The levy can be any amount up to the levy limit, which is reestablished every year in accordance with Proposition 2½ provisions.\*

**Levy Ceiling** – A levy ceiling is one of two types of levy (tax) restrictions imposed by MGL c. 59 § 21C (Proposition 2½). It states that, in any year, the real and personal property taxes imposed may not exceed 2½ percent of the total full and fair cash value of all taxable property. Property taxes levied may exceed this limit only if the community passes a capital exclusion, debt exclusion, or special exclusion.\*

**Levy Limit** – A levy limit is one of two types of levy (tax) restrictions imposed by MGL c. 59 § 21C (Proposition 2½). It states that the real and personal property taxes imposed by a city or town may only grow each year by 2½ percent of the prior year's levy limit, plus new growth and any overrides or exclusions. The levy limit can exceed the levy ceiling only if the community passes a capital expenditure exclusion, debt exclusion, or special exclusion.\*

**Line Item:** Information shown on a separate line of its own within the budget. The Director of Finance and Operations is responsible for creating these and can sometimes move money from one line item to another to help cover cost or unanticipated overspending. SCOM periodically reviews and approves budget transfers between budget categories (a grouping of line items) but the Superintendent and Finance Director can transfer between line items within the same budget category.

**Minimum Local Contribution:** The minimum amount each town must appropriate from property taxes for the support of schools.

**MSBA:** The **M**assachusetts **S**chool **B**uilding **A**uthority reimburses a percentage of capital improvement projects, making it financially feasible for school districts to fund large projects. The funding is competitive; they paid for approximately 40% of the Tahanto building.

**Municipal Revenue Growth Factor:** Municipal revenue growth factors (MRGFs) are a component used by the Department of Elementary and Secondary Education in determining the annual allocation of the Chapter 70 aid cherry sheet program.<sup>6</sup> They factor in annual commercial tax revenue.

---

<sup>6</sup> "Cherry Sheets, State-owned Land, Payments ... - Mass.gov." <https://www.mass.gov/service-details/cherry-sheets-state-owned-land-payments-municipal-revenue-growth-factors-mrgf>. Accessed 10 Mar. 2020.

**Net School Spending:** School budget and municipal budget amounts attributable to education, excluding long-term debt service, student transportation, school lunches and certain other specified school expenditures. A community's net school spending must equal or exceed the requirement established annually by the DOE.<sup>7</sup>

**Operating Budget:** Costs to run the school district, excluding capital costs. This is an estimate of projected future costs and income, relying on expected expenses, future costs, and anticipated revenue. .

**OPEB (Other Postemployment Benefits)** – Many public employees earn benefits over their years of service that they do not receive until after their government employment ends. While pensions are the most common of these, other postemployment benefits generally include combinations of health, dental, vision, and life insurances. These are provided to eligible retirees and sometimes to their beneficiaries, and as a group, are referred to as OPEB.\*

**Override** – A vote by a community at an election to permanently increase the levy limit. An override vote may increase the levy limit no higher than the levy ceiling. The override question on the election ballot must state a purpose for the override and the dollar amount.\*

**Proposition 2½** – A state law enacted in 1980, Proposition 2½ regulates local property tax administration and limits the amount of revenue a city or town may raise from local property taxes each year to fund municipal operations.\*

**Private Grants:** Grants specifically offered to our schools/district. Examples are grants offered by the BEF and PTO, as well as private donations. These must be used in accordance with the terms, conditions, purpose, and restrictions listed in the grant.

**Procurement:** How vendors are acquired/procured. If the cost of the service/project is under \$10,000, the district should use reasonable judgement. If it is between \$10,000-50,000, three quotes are required. If it is over \$50,000, it must be submitted for public bid via state websites.

**Regional Contributions:** The amount each town has to pay towards the budget is determined by our Regional Agreement. Each town must first pay its Minimum Local Contribution for Tahanto, the remainder is split, based on student population.

---

<sup>7</sup> "Municipal Finance / Budget Glossary | Ashland, MA." <https://www.ashlandmass.com/278/Municipal-Finance-Budget-Glossary>. Accessed 10 Mar. 2020.

**Regional Transportation Funding:** The state reimburses regional districts approximately 75% of transportation costs for those living 1.5 miles or more from the school.

**Revolving Account:** Accounts for specific programs that take in fees. These programs fully or partially support themselves (revenue = expenses), but they sometimes require funding / often *raise* additional revenue. The latter does not require appropriation and therefore can be used to fund any needs within the budget by simply spending from the account. Examples of Revolving Accounts are the Afterschool Program, School Lunch, School Choice, and Athletics.

Sometimes, costs for programs such as Athletics are split between the general fund and revolving fund, with fees intended to provide partial support, as they otherwise may be too costly and unaffordable for participants.

**Salary Warrant:** Bi-weekly warrants signed off by SCOM, showing they have been reviewed and approved. Salary increases are typically done annually, before the beginning of each school year.

**School Choice:** When there are low class sizes within a school, the district can fill vacant spots with students from other towns who choose to receive their education at BBRSD. For each student we receive, the student's home district must pay BBRSD \$5,000. Conversely, if a student from our district opts to attend a different one, the district must disburse \$5,000.

**State Grant:** Competitive grant that helps fund a school's needs. Examples of items that were funded by state grants are the BMS pellet furnace and Walkie Talkies for the High School.

**Superintendent's Budget Proposal Process:** Superintendent first meets with administrative teams on expected needs in each school for the following year. Once they are listed and cost determined, the Superintendent meets with the Director of Finance and Operations to create a budget, including the district's needs (capital, etc). The "first pass" is the presentation of the wish list budget. Genuine effort is made to limit the increase from the previous year. The first pass is the most expensive budget proposal. With feedback from the SCOM and FinCom, the budget is revisited. This is where costs that can be delayed or cut are addressed, and money from other accounts can sometimes be creatively moved around to help finance some of the remaining needs. There is a second presentation where the budget is pared down, and the process for lowering the number is shared.

**Target Share:** The amount the state targets the towns to pay toward the Foundation Budget. Sometimes the target share and actual share differ by a small amount.

For further financial information and tutorial videos from the MA Dept. of Revenue: [Municipal Finance Training and Resource Center](#)

School Finance information from DESE: [School Finance and District Support](#)

\*Municipal Glossary, Division of Local Services, MA Dept. of Revenue  
January 2020

## **School Committee Goals 2020-2021**

### School Committee Goal #1 New Member On-boarding:

A new committee member onboarding experience will be piloted from Jan. 2021 - Sept. 2021 to improve the speed at which a new member feels comfortable and knowledgeable in their role and to inform recommended next steps for strengthening the process at the completion of the pilot.

By Nov. 2020 the committee will discuss recommendations for a complete onboarding process and by Dec. 2020 agree on the process to be implemented. By April 2021, any new members to the committee will be solicited for feedback on improving the process and agreed upon improvements will be implemented in May 2021. By Oct. 2021, members of the school committee, superintendent, and school committee administrative assistant will provide feedback on the pilot and recommend further improvements to the onboarding process.

### Pilot Onboarding Process:

- New member is sworn in by town clerk
- New member is assigned a mentor at or before member's first school committee meeting (mentor guidance below)
- New member meets 1:1 with Superintendent at Central Office within first month

- ❑ New member meets 1:1 in person or telephonically with Chair of Committee within first month
- ❑ New member can [Meet the School Committee](#) to learn more about fellow members. New member should create brief biography within the first month for publication and submit it to Kristi along with a picture.
- ❑ New member completes [Ethics Training](#) online as soon as possible and submits certificate of training to town clerk
- ❑ New member registers at [MASC](#) (Massachusetts Association of School Committees). New member can also register for [The Daily Ed Newsletter](#) , which provides statewide updates on current events affecting School Committees.
- ❑ New member completes "Charting the Course " within the first year in office and ideally within the first three months if possible. Conference dates can be found via MASC's [Upcoming Events](#)
- ❑ New member reads the school committee handbook

#### Mentor Guidelines:

- Mentor provides contact info and checks in with new member periodically such as before/after meetings and at least monthly for the first three months to provide guidance and answer questions.
- Mentor ensures member knows how to access trainings, MASC website, and listserv.
- Mentor checks that all links in school committee handbook are working and updates information as necessary.
- Mentor facilitates meeting between new member and representative of the Superintendent Evaluation Sub-Committee regarding role in Superintendent Evaluation Process.

#### School Committee Goal # 2 Community Engagement

##### **Goal:**

Increase and improve upon current school committee's community engagement including but not limited to use of social media, solicitation of community feedback, community visibility and involvement in activities focused on building support for student learning at BBRSD.

##### **Timeline:**

*November 2020 – January 2021:* A subcommittee composed of Superintendent, (1) School committee member and (2) members of the community will propose to SC a set of policies and practices to support goal

*January 2021 – April 2021:* Subcommittee will implement policies and practices in line with and with support of Superintendent and administration.

*May 2021 – June 2021:* – Subcommittee will solicit, compile and report on observations, benefits and effectiveness of policies and practices.

**Action Items:**

- Assign School Committee member to committee (Keith Lewis)
- Schedule Recurring Bi-weekly/tri-weekly meetings between SC member and Superintendent. (Keith Lewis & Jeff Zanghi)
- Solicit Candidates to fill the community participation (Keith Lewis & Jim Spencer)
- Align committee with Superintendent goals and community committee
- Determine practices and policies in relations to but not limited to;
  - Social networking
  - Solicitation of feedback
  - Alignment with Superintendent goal around equity & Field trips
  - Alignment & participation with and or at community events
  - Alignment & participation with and or school and community groups such as PTO, BEF, SEPAC, LINK, etc.