



**Monomoy Regional School District - Monomoy Regional School Committee
Annual MRSC Workshop Agenda
Thursday, July 24, 2025 at 5:00 PM
Monomoy Regional High School Library, 75 Oak Street, Harwich, MA 02645**

AGENDA

- A. Call to Order
- B. Reports and Discussions
 - i. DESE Annual Submission of School Resource Officer and Mental, Social or Emotional Health Support Personnel Data
 - ii. Approval of prior year encumbrances
 - iii. Approval of Child Care Services Lease Agreement - YMCA
- C. Action Items -Vote Required
 - i. Approval of prior year encumbrances
 - ii. Approval of Child Care Services Lease Agreement - YMCA
- D. Housekeeping items
- E. Understanding Factors Underlying Our Regional Agreement
 - a. What brought the towns together to form Monomoy originally?
 - b. Trends in foundation enrollment, local effort capacity, state foundation budget, municipal revenue growth factor, and required local contribution components of the Chapter 70 formula
 - c. How these factors impact the assessment formula within the Regional Agreement and potentially fuel tension between member towns
 - i. How local contributions, state funding, grants, and other revenues are applied to the assessment (to fund the budget)
 - d. Trends in year-round resident and voter census numbers for member towns
 - e. The logic behind the change to the Regional Agreement in 2022 and the impact on each town
- F. Understanding the current and future impacts of shifting demographics since regionalization
Elementary enrollment/demographics and K enrollment/demographics when compared to secondary enrollment/demographics
 - a. Harwich:Chatham resident student ratios
 - b. English Language Learner numbers and home languages
 - c. School choice enrollment
 - d. Available classroom space in each elementary school and middle school
- G. Behind the PreK Conversation: Is it time to consider Universal Preschool?
 - a. Using the available free classroom spaces, build into a future budget funding for universal preschool for 4-year-olds (full day, full school year) and potentially 3-year-olds (if space is available)
- H. Secondary Capital Needs in the Next 5-10 Years and future planning
 - a. Middle school needs beyond the windows, siding, and roof: HVAC system?
 - b. High school needs: Turf field and track
- I. Elementary School Major Capital Needs in the Next 5-10 Years and future planning
 - a. HES Boiler and MSBA Accelerated Repairs Requirements
 - b. CES Siding, Windows, and Roof
 - c. Given the enrollment trends, family wants, and capital needs, exploring the educational benefits, potential cost savings, and challenges of theoretical elementary school consolidation
- J. How can we better engage the Select Boards and voters of our towns?
- K. Presentation of Warrants
- L. Adjournment

Authorized Posting Officer

Roberta Simmons

July 22, 2025

Monomoy Regional School District

Scott Carpenter, Ed.D.
Superintendent

Michael MacMillan
Business Manager

Melissa Maguire
Director of Student Services



Robin A. Millen, Ed.D.
Assistant Superintendent of
Curriculum, Instruction and Assessment

Paul G. Donlan
Treasurer

**Annual Submission of School Resource Officer and mental, Social or emotional Health
Support Personnel Data
MGL Chapter 71, Section 37P(d)
Presented to the School Committee July 24, 2025**

Requirement #1

School Resource Officers for the most recently completed school year (2024-2025)

The number of SROs for the most recently completed school year:	2
Cost to the district of assigning SRO(s):	\$0 - Each town's police department carries the cost of the MRSD School Resource Officers

Requirement #2

Mental, Social or Emotional Health Support Personnel for the upcoming school year (e.g., for information due August 1, 2025, provide information for School Year 2025-2026)

Total Budget	\$2,062,852
Positions included	1 Mental Health Coordinator 8 School Counselors 2 Adjustment Counselors 6 Nurses 4 School Psychologists

Requirement #3

The number of school-based arrests, citations, and court referrals made in the previous year disaggregated as required by the Department of Elementary and Secondary Education.

School-Based Arrests*	0
Citations	3
Court Referrals*	3

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Robin A. Millen, Ed.D.
Assistant Superintendent of Curriculum,
Instruction and Assessment

Paul G. Donlan
Treasurer

To: Monomoy Regional School Committee
From: Michael MacMillan
Date: 7/22/2025
Re: Prior Year Encumbrances – Vote Required

MOTION

To approve the payment of one thousand, two hundred and eighty nine dollars and sixty cents in FY25 invoices not previously encumbered, as presented to the School Committee.

BACKGROUND

The district's general fund is funded primarily from the assessments to the Towns of Chatham and Harwich and from state educational funding. As these funds are raised for a specific financial year they should be expended within that year.

If the appropriation from the current year's general fund is required to pay for costs relating to the previous year, the School Committee's approval is required.

The district has received \$1,289.60 in invoices from FY25 for amounts that were not previously encumbered. A list of the amounts and vendors is provided below.

Vendor	Reason for Change	Amount
Limbach	No Prior Year Encumbrance	\$704.00
Kelly Ozolins	No Prior Year Encumbrance	\$570.00
Pacific Interpreters	No Prior Year Encumbrance	\$15.60
	Total	\$1,289.60

Michael MacMillan.
School Business Manager



Limbach Company LLC- New England
30 Corporate Drive Suite 350
Burlington MA, 01803
781-935-6700

Key
INVOICE

MONOMOY REGIONAL SCHOOL DISTRICT
425 CROWELL ROAD
CHATHAM, MA 02633

Invoice #: 13842
Invoice Date: 07/14/2025
Due Date: 08/13/2025
Customer Number: 201037

ATTN: MICHAEL MACMILLAN
Work Order Number: 193151
P.O. Number
Service Location
MONOMOY REGIONAL MIDDLE SCHOOL
425 CROWELL RD
CHATHAM, MA 02633

Description: AC IN ADMIN NOT WORKING
Visit Resolution: 6/5/25 s.d. Called to check AC in administration offices. Overrode controller through BMS system. Unable to get compressor to cycle. Bypassed controller to confirm that compressor will run. Began tracing out control wiring and found No cooling command from controller. Contacted BMS contractor to set up repair date. Follow up required with controls technician.

Labor

DURGIN, SHAWN	06/05/25	4.000	@	176.00	704.00
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Net Labor: \$704.00

Work Order Total: \$704.00

Sales Tax: \$0.00

Total Invoice: \$704.00

THANK YOU FOR YOUR BUSINESS!

If you have any questions regarding this invoice or would like to make payment by ACH, please contact our office at 781-935-6700.

[Link to pay \\$723.36* via credit card \(*2.75% fee applies\)](#)

25 JUL 17 PM12:07:42

Purchase Requisition**Central Office****No. 60509****Vendor Information**Ozolins, Kelly
24 Spinnaker St

Sandwich MA 02563

Contact Person: Ozolins, Kelly

Phone: Fax: () - 0

Requisition Information

SHIP TO: Monomoy Regional Business Office

REQUESTER: Leah Tambolloe

PROJECT: Undesignated

REQUISITION TYPE: Purchase Order

ORDER METHOD: Fax

REQUISITION DATE: 7/21/2025

DATE REQUIRED: 8/5/2025

REFERENCE:

BUYER:

AWARD NUMBER:

Line	Qty	Unit	Part#	Description	Account Number	Unit Price	Extended	Tax	Freight
1	1	EA		PRIOR YEAR IINVOICE - Supporting Vulnerable Students and Struggling Learners	1000.30.2356.600.400.001.3498	570.00	570.00	0.00	0.00
DIST Staff At PD Otr Exp									

APPROVAL SIGNATURES: _____

Sub-Total: 570.00**Freight:** 0.00**Tax:** 0.00**Total Amount:** 570.00

NOTES:

FILE COPY

***Title:** Supporting Vulnerable Students a **Course #:** IMS25510
Description: See attached course description

Schedule Type: ☒ Single ☐ Multiple

***Start:** Jun 16, 2025 ***End:** Aug 11, 2025
8:00 PM 9:00 PM
***Location:** Online with Zoom and Interactive Discussion Boards

Credits:
CEU GC PDP Completion Attendance
Hrs Hrs

- COURSE CREDIT REQUESTED:

☒ Yes
☐ No

Attach a copy of the course description using the paperclip at the bottom of the form.

- JUSTIFICATION STATEMENT (RELEVANCE TO CURRENT TEACHING ASSIGNMENT):

This course will aid in building my skills when interacting with students with vulnerabilities. It will add the appropriate tools to my toolbox when I work with students who are experiencing emotional, academic, and personal struggles.

- INSTITUTION GRANTING CREDIT:

www.connectinglink.com
Andrews University
MA

- ACCREDITATION OF UNIVERSITY/INSTITUTION: (DESE APPROVED ACCREDITATION)

Andrews University, MA

COURSE NAME: Supporting Vulnerable Students and Struggling Learners

GRADUATE CREDITS: 3

TCL ID: IMS25510

UNIVERSITY & ID: Andrews University, EDCI 628-051

CLASS DATES: 06/16/2025 - 06/29/2025

CLASS LOCATION: Interactive

TUITION: \$570.00

DISCOUNT: \$0.00

SUB-TOTAL: \$570.00

TOTAL PAID: \$570.00

BALANCE: \$0.00

No textbook will ship for this course. Required reading is embedded within each Milestone.

REGISTRATION INFORMATION

ACCOUNT DETAILS

Click to set up your portal account

You can also find a copy of your receipt and purchase history in the user portal.

Helpful Resources

TCL Policies

Online User's Guide - Structured and Self-Paced Courses

Other Details

If you have any questions about your order or your courses, please contact us at info@connectinglink.com, via phone at (888) 550-5465 (Monday-Friday 7:00am to 5:00pm Pacific Time) or via our website chat at <https://www.connectinglink.com>.

Office of the Registrar

The Connecting Link

The Connecting Link does not receive funding from the Department of Education's student aid programs. For this reason, we do not meet the reporting requirements to complete Form 1098-T. Our university partners are also not eligible to provide 1098-T forms for TCL courses. The Connecting Link can provide a statement of tuition paid, which participants may be able to report as an expense on their tax forms.

Kelly

*Mrs. Kelly Ozolins
Grade Seven Science Teacher
Team Wychmere Harbor
Monomoy Regional Middle School*

----- Forwarded message -----

From: **Kelly Ozolins** <kellyozolins@gmail.com>
Date: Tue, Jul 8, 2025 at 1:37 PM
Subject: Fwd: Order Receipt
To: <kozolins@monomoy.edu>

----- Forwarded message -----

From: **The Connecting Link** <info@connectinglink.com>
Date: Mon, Jun 16, 2025 at 8:24 AM
Subject: Order Receipt
To: Kelly Ozolins <kellyozolins@gmail.com>



The Connecting Link

CONGRATS, Kelly Ozolins!

You're one step closer to advancing your career.

YOUR ORDER #O-4031395

REGISTRATION DATE: 06/16/25

ORDER INFORMATION



The Connecting Link

STUDENT NAME:

Kelly Ozolins



pacificinterpretersSM
A LanguageLine Solutions[®] Company

BILL TO:
Monomoy Regional School District - Billing
Business Office
425 Crowell Road
Chatham, Massachusetts 02633
United States

JUNE 2025 INVOICE

PO NUMBER: 251041
INVOICE NUMBER: SIN304404
ACCOUNT NUMBER: 101547
INVOICE DATE: 06/30/2025
TERMS: Net 30
FOR BILLING INQUIRIES: 800-324-8060
FEDERAL TAX ID: 93-1080930

Req 60468

HOW MUCH DO I OWE ?

PREVIOUS BALANCE	\$32.50
PAYMENTS	\$0.00
ADJUSTMENTS	(\$32.50)
BALANCE FORWARD	\$0.00
NEW CHARGES	
Over-the-Phone Interpreting	\$15.60
LanguageLine Direct Response	\$0.00
LanguageLine Insight [®] Video Interpreting	\$0.00
Other Charges	\$0.00
Equipment Charges	\$0.00
TOTAL NEW CHARGES	\$15.60
TOTAL AMOUNT DUE	\$15.60

WHAT DO I NEED TO KNOW ?

Questions? Pacific Interpreters must receive any billing inquiries or disputes prior to the end of the month. Click on the 'Contact Us' tab on our website, www.pacificinterpreters.com, then complete and submit your request.

To Remit: Please include Invoice Number, Amount Paid Per Invoice, and Account Number with your remittance for proper and timely credit to your account. Or, detach and return the Payment Coupon below with your remittance. Would you like to pay your bill online? Visit www.LanguageLine.com. Go to Bill Pay under the Customer Service tab and fill out the form.

Payment Coupon:
Invoice Number: SIN304404

Account Number: 101547

Invoice Date: June 30, 2025

Monomoy Regional School District - Billing
Business Office
425 Crowell Road
Chatham, Massachusetts 02633
United States

TOTAL AMOUNT DUE \$15.60

Payment By ACH or Wire:
Pacific Interpreters Inc.
Receiving Financial Institution: Wells Fargo

ABA Routing #: 111900659
Receiving Account #: 1994423778
To Remit Via Email: accounts@pacificinterpreters.com
To Remit via Fax: (831) 648-5802

Make Checks Payable to:
Pacific Interpreters
PO Box 204313
Dallas, TX 75320-4313

25 JUL 16 AM 9:02:25



ADJUSTMENTS:

Date	Description	Quantity	Charge(+)	Credit(-)	Comments
6/24/2025	Misapplied calls 5/31/2025			(\$32.50)	
				TOTAL:	(\$32.50)

EQUIPMENT... CHARGES:

Product	Description	Quantity	Unit Price	Extended Price
				TOTAL:

OTHER CHARGES:

Product	Description	Quantity	Unit Price	Extended Price
				TOTAL:

Summary of Telephone Interpretation Services

		Calls	Minutes	Billed
Monomoy Regional School District	842874	2	12	\$15.60
Totals for Account:		2	12	\$15.60

Monomoy Regional School District		842874			
Reference	Call Date & Time	Language	Connect time (sec)	Min Billed	Interpreter Cust Anl School
CR-0556431148	6/25/2025 6:21 AM	PORTUGUESE BRAZILIAN	9	6	\$7.80 410766 5084307200 MONOMOY REGIONAL
CR-0556131483	6/24/2025 7:23 AM	SPANISH	3	6	\$7.80 471057 5084307200 MONOY REGIONAL HIGH
Site Calls: 2		Site Minutes: 12		Site Billed: \$15.60	

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Instruction and Assessment

Paul G. Donlan
Treasurer

To: Monomoy Regional School Committee
From: Michael MacMillan
Date: 7/22/2025
Re: Lease Agreement for Child Care Services

MOTION

To approve that the district enter into a lease agreement for up to five years with the YMCA for the use of classrooms and an office at Harwich Elementary School for the purposes of providing child care services.

BACKGROUND

The district has been in a lease agreement with the YMCA to provide child care services at Harwich Elementary School. The lease agreement has expired and the district has conducted the procurement process to enter into a new lease agreement. As the agreement will be for over 3 years, School Committee approval is required.

The district issued a 'Request for Proposals for Child Care Services' on June 4, 2025 with a due date of July 11, 2025. The Request for Proposals was advertised in the Cape Cod Chronicle, COMMBUYS (the Commonwealth of Massachusetts's online procurement system), and the Central Register (a publication of the Secretary of the Commonwealth of Massachusetts). The YMCA was the only organization to submit a proposal.

As detailed in the Request for Proposals (attached) all proposals must meet certain minimum criteria and are then evaluated using comparative criteria (see the attached RFP for details). The district reviewed the YMCA's proposal (attached) and found that it met the minimum criteria and that it was evaluated positively due to the quality of the programming and the size and stability of the overall organization (see attached evaluation sheet). The Harwich ES Principal supports continuing this agreement.

The YMCA proposal includes an annual payment to the district of \$22,500. This is the same rate as the current contract.

Michael MacMillan.
School Business Manager

**AGREEMENT BETWEEN THE TOWNS OF CHATHAM AND HARWICH WITH
RESPECT TO THE FORMATION OF A REGIONAL SCHOOL DISTRICT**

Whereas the Towns of Chatham and Harwich, towns in the Commonwealth of Massachusetts, hereinafter referred to as "member towns", desire to create a regional school district consistent with the terms of Chapter 71 of the Massachusetts General Laws, as amended, the member towns, in consideration of the mutual promises contained herein, agree as follows:

Section I. MEMBERSHIP OF THE REGIONAL DISTRICT SCHOOL COMMITTEE

A. Name and Composition. During the transition period spoken of in Section XX herein, the District shall be named by the Interim Regional School Committee, utilizing a majority vote consistent with Section I,B below. The Regional District School Committee, hereinafter sometimes referred to as the "Committee", shall consist of eight (8) members, four (4) of whom reside in the Town of Chatham and four (4) of whom reside in the Town of Harwich.

B. Weighted Voting. Because of the disparity in the population of the two towns, each of the four (4) Committee members from Harwich will have one full vote on all matters and each of the four (4) Committee members from Chatham will have 50% of a vote on all matters, for a total of six (6) votes. For a motion which requires a majority vote to pass, a majority (i.e., greater than 50%) of the six (6) votes (which must be no fewer than 3.5 votes) must be cast in the affirmative and at least one Committee member from each of the two towns must vote in the affirmative. For the passage of a motion requiring a two-thirds vote (such as the passage of the annual budget), at least two thirds (i.e., no fewer than 4 votes) of the six (6) total votes must be cast in the affirmative. Should a shift in the respective populations of the member towns, based on the most recent decennial federal census figures, cause an impermissible disparity based on one-person, one-vote principles, the Committee will act to address the disparity via the amendment process.

C. Election of Members. Each member must reside in the town which she or he represents. Each member must be elected consistent with the process for the election of town officials in said town and will be elected to open seats during the annual election or special election in said town. The term of each elected member will begin on the first business day after his or her election and after being sworn in by the respective Town Clerk. A member who has not otherwise vacated his or her seat will continue to serve until his or her successor is elected and sworn.

At every annual election, except at the initial election of the Regional School District Committee when the procedure specified below in subsection E (Initial Staggering of Terms) will be applied, there shall be elected one or two members of the Committee from the Town of Chatham and one or two members of the Committee from the Town of Harwich as is necessary to maintain the membership of the Committee in accordance with subsection A (Name and Composition) above.

D. Length of Terms. With the sole exception of the initial election of the Regional School District Committee by the procedure specified below in subsection E (Initial Staggering of

Terms), the term of office of each elected member shall be three years, and a member will serve until his/her successor is elected and sworn in by the respective Town Clerk.

E. Initial Staggering of Terms. For the purpose of staggering the terms of the initial Regional School District Committee only, the following procedure will apply:

In regard to each of the member towns, the two (2) candidates receiving the highest and second-highest number of votes will be elected to three (3) year terms; the candidate receiving the third highest number of votes will be elected to a two (2) year term; and the candidate receiving the fourth highest number of votes will be elected to a one (1) year term.

F. Vacancies. Any vacancy occurring on the Regional District School Committee for any cause shall be filled by the local Board of Selectmen and the remaining Regional District School Committee members from the town where the vacancy occurs. The members of the Board of Selectmen shall meet in joint session with the remaining members of the Regional School District Committee from the town where the vacancy occurs. A majority vote of the members of this joint session shall be required to fill the vacant position. Such replacement shall serve until the next annual town election. At that next annual election, a person will be elected to serve the balance of the unexpired term, if any, which had become vacant.

G. Organization. At the first scheduled meeting of the Regional District School Committee after the annual election of all member towns, the Regional District School Committee shall organize in accordance with Massachusetts General Laws, Chapter 71, Section 16A, known as "Regional School Committee, Organization". In addition, the Regional District School Committee shall fix the times and place for its regular meetings for the new term, provide for the calling of special meetings upon written or electronic notice to all its members, and appoint appropriate sub- committees and other officers.

Section II. POWERS OF THE COMMITTEE

The Committee shall possess all of the powers conferred by law upon regional school district committees via G.L. Chapter 71, section 16 and otherwise, including but not limited to the power to acquire property and/or to enter into leases for land and/or buildings. During the period July 1, 2012 to June 30, 2013, the Committee shall have the power to perform all of the end of the year reporting functions that normally would have been performed by the Chatham School Committee and the Harwich School Committee.

Section III. QUORUMS, VOTES AND GOVERNANCE

A. A quorum to conduct business shall consist of five (5) members, with no fewer than two members being present from each of the member towns. A number less than the majority may vote to adjourn, but shall not take any other action.

B. On all issues requiring a vote of the Regional District School Committee, a simple majority vote (i.e., no fewer than 3.5 of the six (6) votes as spoken to in Section I, subsection B) shall

be required to pass all motions, except as specified elsewhere in this Agreement, or as required by statute and/or regulation.

- C. The Regional District School Committee shall annually elect officers at the first regularly scheduled meeting held after the last of the elections in the member towns. Such officers shall exercise the powers expressed and implied in G.L. Chapter 71, section 16A.
- D. A Chairperson and a Vice-Chairperson shall be elected from among the Regional District School Committee's membership. The Committee will have as standard practice that the position of Chairperson will rotate annually between the member towns. For example, in the first year that the District is in existence, the Chairperson will be elected without regard to where he/she resides. In year two, however, the Chairperson shall be elected from members who reside in the other town. This rotation sequence will then be maintained in future years. By a two-thirds (2/3) vote, and with at least one Committee member from each of the member towns voting in the affirmative, the Regional District School Committee may in any given year deviate from this standard practice. The Vice-Chairperson in any given year shall be drawn from the members who reside in the member town different from that of the Chairperson.
- E. The Regional District School Committee shall elect a Secretary who may or may not be a member of the Regional District School Committee's membership.
- F. The Regional District School Committee shall appoint a Treasurer who shall not be a member of the Regional District School Committee.
- G. Any action voted by the Regional District School Committee which directly and specifically affects the elementary school(s) in only one town will require that three of the four members of the Regional District School Committee from the town in which the affected elementary school(s) is/are located vote in support of that action.

Section IV. TYPE OF SCHOOL DISTRICT AND TRANSFER OF ASSETS

- A. The Regional School District shall provide educational programs for public school students who reside in the member towns and who are attending grades pre-kindergarten through and including grade 12. The Regional School District Committee, as established consistent with Section I (Membership of the Regional School District School Committee) above, is authorized in its discretion to establish and maintain other educational programs, including, but not limited to, vocational-technical educational programs consistent with G.L. Chapter 74, and is authorized in its discretion to join or form educational collaboratives consistent with G.L. Chapter 40, s. 4E.
- B. The Regional School District may, at the Committee's discretion, include pre-kindergarten, and shall include all grades from K-12.
- C. The elementary schools shall serve students in grades K-4, and, at the Committee's discretion, pre-kindergarten.

D. The middle school(s)/high school(s) shall serve students in grades 5-12.

E. Where the term "preschool" is mentioned in this Agreement, it is done in order to permit the Regional District School Committee, at some future date, the discretion to provide "universal" preschool classes.

F. The Committee may in its discretion alter the elementary/secondary grade configuration spoken to above.

G. At the time of the creation of the District, any and all money held in so-called "revolving funds," in gift accounts, in grant accounts, or in student activity accounts/funds that are held by the member towns for the benefit of their respective school departments will be conveyed to the District to be utilized for educational and/or extracurricular purposes consistent with the purposes for which the revolving funds or accounts were created. Additionally, school-related equipment, material, and supplies that are owned by the school departments of the member towns at the time of the creation of the District will be conveyed to the District.

Section V. LOCATION AND OWNERSHIP OF SCHOOLS

A. All Regional District schools shall be located within the geographical limits of the District. The Regional District school buildings shall be located on sites owned by, or leased to, the District.

B. It is the intent of the member towns to seek to build a new high school and to renovate a middle school with all due alacrity.

C. There shall be no less than one elementary school in each member town. Students in the elementary grades shall attend schools in their towns of residence, except in special cases as defined by the Regional District School Committee.

D. Each member town shall retain ownership of its elementary school buildings and grounds that are in existence at the time of the formation of the District and shall lease the same to the District for the sum of one dollar per year. Each lease shall be for a term of up to twenty (20) years, with said term to be established by the District School Committee. The term shall commence on the date when the Regional District School Committee completes the transition period spoken to in Section XX and comes into full existence. The leases shall contain provisions for an extension of up to 20 years at the option of the Regional District School Committee. The leases shall contain provisions authorizing the District to repair, improve, alter, remodel and maintain the buildings or any part thereof, at the District's expense. Said leases shall not prevent the use of the buildings or premises by the respective owner towns, upon approval of the Regional School District Committee; such approval shall not be unreasonably withheld. Each lease involving a member town may include such other terms as may be agreed upon by the Selectmen of that member town and by the Regional District School Committee, who shall execute the lease for the member towns and the District, respectively.

E. The Town of Chatham shall lease to the Regional District School Committee the land and buildings (at the option of the Committee) presently known as the Elementary School, as well as the land and/or the buildings (at the option of the Committee) comprising the combined Middle School/ High School. The terms expressed in paragraph V, D shall apply equally to this paragraph.

F. The Town of Harwich, shall lease to the Regional District School Committee the land and/or buildings (at the option of the Committee) presently known as the Elementary School, as well as the land and/or the buildings (at the option of the Committee) presently known as the Middle School, and the land and/or the buildings (at the option of the Committee) presently known as the High School. The terms expressed in paragraph V,D shall apply equally to this paragraph.

G. The leases of all of the above-referenced school buildings should be signed by the date the District Committee completes the transition period spoken to in Section XX and comes into full existence.

H. At whatever point in time that land and/or buildings that are leased by a member town to the Regional District School Committee ceases to be needed by the District, the District School Committee shall vote to declare said land and/or buildings as surplus, and the custody and control of said land and/or buildings shall revert to the owner town.

I. Payments from future leases of Regional property shall be paid to the Regional School District.

Section VI. TRANSPORTATION

The Regional District School Committee shall set District transportation policy. School transportation shall be provided by the Regional School District, and the cost thereof shall be apportioned among the member towns as defined in Section IX.

Section VII. BUDGET

A. The Committee shall prepare an annual operating and maintenance budget using accounts itemized in conformance with the chart of accounts utilized and required by the Massachusetts Department of Elementary and Secondary Education or its successor.

B. The Regional School District's budgetary process, and the timing of and method of appropriation of funds in regard thereto, shall be governed by the provisions of G. L. c. 71 §16(m) and c. 71 §16B and other applicable provisions of G. L. c. 71 and any special laws or regulations relating thereto.

C. The Regional District School Committee shall prepare a budget on a fiscal year basis for the District in the following manner:

1. The Regional District budget process shall be initiated annually on or about October 1 and shall provide opportunity for the Selectman and Finance Committee of each

member town to have input into its preparation. On or about January 15th, the Regional District School Committee shall complete its proposed budget for the ensuing year. The Regional District School Committee shall have a Budget/Finance Subcommittee charged with, among other things, to develop a proposed budget. The Budget/Finance Subcommittee shall have four (4) members, two of which shall be from each member town. The Budget/Finance Subcommittee shall vote to approve a proposed budget by a majority vote with at least one member from each member town voting in the affirmative. Said proposed budget is subject to the approval by majority vote of the Regional District School Committee. Said proposed budget shall be posted in the Town Hall of each member town, shall be provided to each member town's public library, and shall be submitted to the Selectmen and Finance Committee members of each member town.

2. Said proposed budget shall contain a notice stating when and where a public hearing will be held. The public hearing shall be held in any District school building. The notice of the public hearing shall be posted in all member towns and published consistent with G.L. chapter 71, section 38N in a newspaper having general circulation in the region. Upon request of the Finance Committee and/or the Board of Selectmen of any member town, the Regional District School Committee shall arrange to meet with such Finance Committee and/or Board of Selectmen for the purpose of discussing the proposed budget. Said proposed budget shall be in reasonable detail, itemized at least as follows: central administration, expenses of instruction, transportation, operation of school plant, maintenance of school plant, capital outlay, and debt and interest charges. All non-recurring expenditures shall be itemized. Enrollment, staffing, total expenditures and assessments for the past five (5) years shall be included. The Finance Committee or the Board of Selectmen of a member town may request further information.
3. Consistent with G.L. chapter 71, section 16B the Regional District School Committee shall adopt by a two-thirds (2/3) vote of all its members a budget with such changes as may have resulted from conferences and/or the public hearing. Within thirty (30) days from the date on which the budget is adopted, the Treasurer of the District shall certify to the Treasurer of each member town that town's assessed share of such budget.
4. The budget and assessments shall be so constructed as to show debt service, transportation, operating, and capital costs. It shall also list all sources of revenue used to reduce operating costs as described in Section IX.
5. The process and the requirements for the approval or disapproval of the budget by the member towns will be consistent with the terms and conditions of chapter 71, section 16B, as well as 603 CMR section 41, et seq, as those terms and conditions may be amended.
6. The budget will be prepared net of School Choice revenue. School Choice revenue will be allocated to reduce each school's portion of the budget. The amount of school

choice revenue to be allocated to each school's portion of the budget will be calculated as follows:

- a. Using enrollment data reported to DESE on October 1st, the school's percentage share of the total number of students attending the district will be calculated for each of the previous three years.
- b. The average of these three percentages will be calculated.
- c. The estimate of the total school choice revenue for the budget year will be multiplied by each school's three year average to determine the amount of school choice revenue to be allocated to that school.

Section VIII. BUDGETARY DEFINITIONS

The budget for the operation of the District's Schools, including payments of principal and interest on bonds and other evidence of indebtedness issued by the District, shall be apportioned to the member towns via the method set out in Section IX and subject to the following definitions:

A. Budget

As defined by this document, the budget is the amount of money voted by the Regional District School Committee to finance the District schools and which will be assessed to the member towns.

B. The budget shall be comprised of various costs, each as herein defined as follows:

1. "Operating Costs" include all costs not included in capital costs, transportation costs, or debt service, as defined below, but operating costs include interest and principal on revenue anticipation notes. Operating costs include the net costs of evening, graduate and extension courses or any other types of courses, including vocational education programs, which are offered by the District to persons other than pupils attending a regular district school program in any of the grades K-12, inclusive.
2. "Capital costs" will include all capital outlay appearing in the 7000 DESE function codes and as defined below in Section IX.B.
3. "Transportation costs" include all costs associated with transporting the District's students to and from school.
4. "Debt service" includes all costs that are used for payment of principal and interest on bonds or other obligations issued by the District except revenue anticipation note.

Section IX. METHOD OF ASSESSING COSTS OF THE DISTRICT

A. Operating Costs. The District shall apportion operating costs via the following process:

1. Each member town will be assigned the minimum required local contribution to the District as determined by DESE.
2. Each member town's share of that portion of the District's operating costs that exceeds the total required local contribution for all member towns is allocated via the following series of calculations:
 - a. The District budget will be separated into three parts based on the following cost centers: the Chatham Elementary School cost center, the Harwich Elementary School cost center, and a combination of the Middle School, the High School, and the District cost centers. This final part of the budget will be known collectively as the "Regional" Cost Center. Each part of the budget will be considered net of general fund revenue and state aid apportioned by the district per Section IX, A. 3. Apportionment of Funds/Revenue.
 - b. The District's Foundation Enrollment as published by DESE will be segmented by member town and grade group (PreK-4 and 5-12).
 - c. An above minimum required local contribution for each cost center will be calculated by subtracting the cost center's portion of the minimum required local contribution from the cost center's part of the budget as presented in (a.) above. Each cost center's portion of the minimum local required contribution will be calculated as follows:
 - i. Each elementary school cost center's portion of the minimum required local contribution will be determined by the member town's minimum required local contribution multiplied by the percentage of that member town's foundation enrollment that is in grades prek to four.
 - ii. The Regional cost center's portion of the member town's minimum required local contribution will be determined as follows:
 - Each member town's minimum required local contribution will be multiplied by the percentage of that town's total foundation enrollment that is in grades five through twelve (including special education beyond grade twelve).
 - The sum of these figures for each member town will be the regional cost center's portion of the minimum local contribution.

d. The above minimum required local contribution for each cost center will be apportioned as follows:

i. Each member town will be apportioned 100% of its local elementary school cost center's part of the District budget above minimum required local contribution.

ii. Each member town will be apportioned a share of the Regional costs center's part of the budget above minimum local contribution as follows:

-Using foundation enrollment data, the percentage of the total number of students in grades five through twelve (including special education beyond grade twelve) that reside in that member town will be calculated for each of the previous three years.

-The average of these three percentages will be calculated. The three year average for each member town will be multiplied by the Regional costs center's part of the budget above minimum local contribution to determine that member town's share.

e. Each member town's minimum required local contribution shall be added to its total above minimum required local contribution to determine its Annual Operating Assessment.

3. Apportionment of Funds/Revenue

a. General fund revenues and state aid (excluding Regional Transportation Aid) will be applied to each cost center's part of the budget as follows:

i. The portion of the revenue to be applied to each elementary school cost center's share of the budget will be calculated as follows:

-Using foundation enrollment data, the percentage of the total foundation enrollment for both member towns that is in grades Prek to Grade four in each member town will be calculated for each of the previous three years.

- The average percentage for these three years will be calculated for each member town.

- That average percentage for each member town will be multiplied by the total general fund revenue and state aid to determine the amount to be applied to that member town's elementary school cost center's share of the budget.

ii. The portion of the revenue to be applied to the regional costs center's share of the budget will be calculated as follows:

-Using foundation enrollment data, the percentage of the total foundation enrollment for both member towns that is in grades five through twelve (including special education beyond grade twelve) will be calculated for each of the previous three years.

-The average percentage for these three years will be calculated.

-That average percentage will be multiplied by the total general fund revenue and state aid to determine the amount to be applied to the regional costs center's share of the budget

- b. All grant and all other District funds shall be apportioned to cost centers by the Committee at the Committee's discretion.

B. Capital Costs. Capital costs shall include all expenses in the nature of capital outlay including, but not limited to, the cost of acquiring land, the cost of constructing, reconstructing, or adding to a school building or buildings, the cost of remodeling or making extraordinary repairs to a school building or buildings, the cost of constructing sewerage systems and sewerage treatment and disposal facilities or the cost of the purchase or use of such systems with a municipality, and any other item of capital outlay for which a regional school district may be authorized to borrow, or which could be categorized as a capital expense in conformance with applicable law and regulation, including, without limitation, the cost of original equipment and furnishings for such school buildings or additions, plans, architects' and consultants' fees, grading and other costs incidental to placing school buildings and additions, sewerage systems and sewerage treatment and disposal facilities, and any premises related to the foregoing in operating condition. Capital costs shall also include payment of principal of and interest on bonds, notes and other obligations issued by the District to finance capital costs.

1. Capital costs attributable to the middle and high schools will be assessed to the member towns on the basis of the three-year rolling average of each member town's total foundation enrollment as follows:
 - Using foundation enrollment data, each member town's percentage share of the total foundation enrollment for the district will be calculated for the previous three years.
 - The average percentage for these three years will be calculated.
 - That average percentage for each member town will be multiplied by the total capital costs attributable to the middle and high schools to determine the amount to be assessed to each member town.
2. Capital costs attributable to the District's elementary schools will be assessed to the member town that owns that building.

C. Transportation Costs. Transportation costs will be assessed to the member towns based upon the number of students residing in each member town who attend the District's schools based on

the average of the most recent three years' enrollment figures as reported, **currently on October 1**, to DESE.

D. Debt Service. Notwithstanding the terms of subsection B above, debt service costs will be assessed to the member towns as follows:

1. Debt service costs attributable to the high school and the middle school will be assessed to the member towns using the three year rolling average of each member town's foundation enrollment as described in Section IX, A, 3a ii, above.
2. All other debt service costs attributable to the elementary school school buildings will be assessed to the member town that owns the building

E. The payment of the assessed share of costs by each member town, as computed by the Committee according to the methods specified in Section IX, shall be made by each member town's Treasurer by check or electronic transfer payable to the District in equal installments by the first business day of the month as set forth below:

Chatham: August, October, December, February, April, May, June

Harwich: July, September, November, January, March, May, June.

Section X. STABILIZATION FUND

The Regional District School Committee may, consistent with the terms and conditions of G.L. chapter 71, section 16G½, establish and maintain a stabilization fund.

Section XI. ADMISSION OF ADDITIONAL TOWNS

By an amendment to this agreement adopted by each member town in accordance with Section XVII (Amendments) and in compliance with the provisions therein contained, any other town or towns may be admitted to the Regional School District upon adoption of such amendment, and also upon compliance with any statutory or regulatory requirement as may be applicable.

Section XII. WITHDRAWAL OF MEMBER TOWNS

In the event that a member town decides to seek to withdraw from the District, the following procedures and requirements will apply:

A. Vote Expressing Desire to Withdraw. Any member town seeking to withdraw from the District shall, by vote at an annual or special town meeting, request the Committee to formulate an amendment to this Agreement setting forth the terms under which the town may withdraw from the District. No withdrawal will take effect on other than July 1 of a given year, and the vote spoken of in the preceding sentence, as well as the notification to the District consistent with paragraph B below, as well as the submittal of a long range education plan consistent with paragraph C below, must all occur no less than two (2) years prior to the desired date of withdrawal.

B. Notice. The clerk of the town seeking to withdraw shall, within seven (7) days of the vote, notify the Committee chairperson as well as the District's superintendent in writing that the town has voted to request the Committee to formulate an amendment to the Agreement setting forth the terms for withdrawal. The clerk will provide a certified copy of the vote with the notification.

C. Long Range Education Plan. No less than two (2) full years prior to the desired date of withdrawal, the town seeking to withdraw, in addition to the other requirements spoken to in paragraph A above, will submit to the Commissioner of Elementary and Secondary Education (hereinafter "the Commissioner") and to the District a "Long Range Education Plan" consistent with 603 CMR 41.02(2). The Long Range Plan will address, in addition to any other factor required by the Commissioner, the following: the expected educational benefits of reorganization; the current and projected enrollments; an inventory of all educational facilities under the jurisdiction of the District; the proposed administrative structure; the fiscal ramifications of withdrawal upon the withdrawing town as well as the other member towns in the District; the geographical and physical characteristics of the area; and the effect that withdrawal will have on student transportation.

D. Requirements. In addition to other terms and requirements which the Committee may include in the amendment, the town seeking to withdraw will be responsible for the following: (1) payment of all operating costs for which it is liable as a member of the District; (2) continuing payments beyond the time of withdrawal to the District for the town's share of the indebtedness of the District which is 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; and (3) for the costs, including legal fees, that accrue to the District as a result of the withdrawal process.

E. Approval of Withdrawal. A request to withdraw shall become effective only if the amendment to the Agreement is approved by vote of the Committee, is approved by the Commissioner, and is approved by majority vote at an annual or special town meeting in the town seeking to withdraw and in each of the other member towns, and the withdrawal can become effective no less than one full year after the completion of these requirements.

F. In no event shall such withdrawal take place prior to ten (10) years from the effective date of this agreement as defined in Section XVIII (Effective Date and Jurisdiction).

Section XIII. ANNUAL REPORT

The Regional District School Committee shall submit to each member town an annual report containing a detailed financial statement and a statement showing methods by which the annual charges assessed against each town were computed, together with such additional information relating to the operation and maintenance of the schools as may be deemed necessary by the Regional District Committee or by the Selectman and/or the Finance Committee of any member town.

Section XIV. TEACHERS

In accordance with G.L. chapter 71, section 42B, teachers serving in the schools of a member town at the time that the District comes into existence and who have professional teacher status shall be employed by the District with that same status. Teachers who are serving in the schools of a member town at the time that the District comes into existence and who do not have professional teacher status shall be employed by the District if there is an available position which such person is certified to fill.

Section XV. INCURRING OF DEBT

The District School Committee may vote to incur debt consistent with the terms and conditions of G.L. chapter 71, section 16(n). At the time of taking action to incur debt, and except for the incurring of temporary debt in anticipation of revenue, the District School Committee may, by a **two-thirds** vote, choose to incur debt using the process that appears in subsection (d) of chapter 71, section 16.

Section XVI. REVIEW OF AGREEMENT

At least every five (5) years, the Committee will undertake a review of the terms of this Agreement. The first review of this Agreement shall occur no later than in the fifth fiscal year of the District's existence. Proposals for amendments to this Agreement will follow the procedure contained in Section XVII (Amendments).

Section XVII. AMENDMENTS

A. Amendments to this Agreement may be initiated by a three-quarters (3/4) vote (i.e., no fewer than 4.5 votes) of the District Committee or by a petition signed by ten percent (10%) of a member town(s) registered voters. Said signatures need to be certified by the Clerk of the respective town who must also certify the fact that the number of signatures represents at least 10% of the registered voters of the town. Such amendments to the agreement must receive a majority vote of approval by each member town at an annual town meeting, and all amendments are subject to the approval of the Commissioner.

B. No such amendment shall be made which shall substantially impair the rights of the holders of any of the District's bonds or notes of the District then outstanding, or the rights of the District to procure the means for payments thereof.

Section XVIII. EFFECTIVE DATE AND JURISDICTION

The full jurisdiction of the Regional District School Committee will commence on July 1, 2012 at the conclusion of the transition period established in Section XX.

Section XIX. SEVERABILITY OF SECTIONS

Consistent with G.L. Chapter 71, section 161, if any provision of this Regional School District Agreement shall be held invalid in any circumstance, such invalidity shall not affect any other provisions or circumstances.

Section XX. TRANSITION PERIOD

As part of the approval of this Agreement, and of the Regional School District created by this Agreement, the member towns as well as the Commissioner will be taken to have approved a transition period, consistent with 603 CMR 41.03(5) which will extend from the date of voter approval of the District until the end of the fiscal year following the fiscal year in which the vote to approve the District was taken. During this transition period, the existing local school committees will continue in existence and will continue to operate the schools of the member towns subject to the restrictions spoken to in this Section XX (hereinafter "this section"). During this transition period, and prior to the seating of the Regional School Committee on July 1, 2011, an Interim Regional School Committee (hereinafter the "IRSC") will be formed consistent with this section which will exercise the powers expressed in this section. The IRSC will exist until midnight on June 30, 2011, at which time the Regional School Committee will be seated and will serve for the balance of the transition period and thereafter.

- A. **Composition of the Interim Regional School Committee.** As soon as possible after the approval of this Agreement by the voters, the Interim Regional School Committee will be formed which will consist of eight (8) members, four (4) from each town. Two (2) of such members will be drawn from the members of, and elected by vote of, each of the two (2) local school committees. Each of these local school committees will also appoint two (2) additional citizens who reside in their respective towns and who are not members of the local school committee to serve on the IRSC. The votes of these members will be weighted, and the requirements for an affirmative vote will be the same, as is expressed in Section I, subsection B of this Agreement. During that part of the transition period when the IRSC is in existence, should any member on the IRSC resign from membership on the IRSC or become ineligible for continued membership on the IRSC (e.g., by leaving the membership of the local school committee or by moving from their respective town) the local school committee will vote a replacement. If the vacancy is caused by one of the members of a local school committee leaving the IRSC, then the replacement shall be chosen from among the remaining members of that local school committee. If the vacancy is caused by one of the citizens leaving the IRSC, then the respective local school committee shall appoint another citizen who is not a member of the local committee as the replacement.

- B. Quorum. A quorum shall exist when a five (5) of the eight (8) IRSC members are present, with no less than two (2) present from each of the member towns. At a meeting where there is no quorum, the members present may vote to adjourn but shall not take any other action.
- C. Election of Officers. The IRSC will elect officers consistent with Section III (Quorums, Votes, and Governance) except that the IRSC officers so chosen will serve throughout that part of the transition period that the IRSC is in existence.
- D. Powers of the IRSC and the Regional School Committee During the Transition Period. During the transition period, the IRSC (until June 30, 2011) and the Regional School Committee (from July 1, 2011 to June 30, 2012) shall possess all powers, subject to the availability of funds necessary for the exercise of such powers, necessary for the planning and implementation of the regional school district, including but not limited to the following:
1. The power to receive funds from the Commonwealth as well as appropriations, grants, and gifts from other sources. This is not intended to alter the fact that during the transition period other funds from the Commonwealth will continue to flow to the member towns and their individual school departments.
 2. The power to establish and adopt policies for the regional school district.
 3. The power to employ a superintendent, treasurer, chief financial officer, and director of Special education, as well as the power to authorize the superintendent to employ other personnel as needed.
 4. The power to contract for and/or purchase goods and services, as well as the power to enter into lease and other agreements with the member towns, collaboratives, vendors, and other agencies and parties, with all the powers being able to be exercised on behalf of the regional school district.
 5. The power to adopt budgets for the regional school district, and to assess the member towns for these budgets.
 6. The power to negotiate and to enter into collective bargaining agreements, which will take effect no sooner than the inception of the Regional School District.
 7. The power to appoint a regional School Building Committee.
 8. The power to develop and adopt a strategic plan for the Regional School District.
 9. The power to appoint subcommittees.

- E. Relationship between the IRSC and the Local School Committees and Between the Regional School Committee and the Local School Committees During the Transition Period. During the transition period, the local school committees of the member towns may not make decisions that will financially obligate or legally encumber the regional School district without ratification by majority vote of the IRSC or, after June 30, 2011, by majority vote of the Regional School Committee. In addition, the local school committees shall comply with the following during the transition period:
1. No building projects will be undertaken and no building closures will occur unless ratified by majority vote of the IRSC or, after June 30, 2011, by majority vote of the Regional School Committee.
 2. Program offerings will remain substantially the same.
 3. No school choice openings will be filled except with the approval by majority vote of the IRSC or, after June 30, 2011, by majority vote of the Regional School Committee.
 4. The school administration of the local school districts shall cooperate with the Regional Administration in terms of information sharing and in terms of the transfer control during the transition period.
 5. During the period July 1, 2011 to June 30, 2012, the Regional School Committee will assume responsibility for the transportation of the regular education students (i.e., not the special education students or the vocational students) who reside in Chatham and Harwich and who are enrolled in the Chatham or Harwich Public Schools. During 2011- 2012, the Chatham School Committee and the Harwich School Committee shall pay an assessment to the Regional School Committee of an amount equal to the cost of said transportation for their respective regular students. The Regional School Committee will have the option of designating the Chatham School Department, the Harwich School Department, or both, as its financial agents(s) for purposes of processing invoices and payments for said transportation.
- F. Termination of IRSC. The IRSC will exist until midnight on June 30, 2011, at which time the Regional School Committee will assume jurisdiction of the Regional School District for the balance of the transition period and thereafter. The Regional School Committee will be deemed to be the legal successor to the IRSC for purposes of all contracts, collective bargaining agreements, other agreements, and leases that have been entered into by the IRSC.

School Choice

**Harwich School Choice In
2011-2012**

Town	Number of Students
Barnstable	6
Brewster	8
Chatham	6
Dennis-Yarmouth	130
Eastham	1
Orleans	3
Total	154

**Chatham School Choice In
2011-2012**

Town	Number of Students
Barnstable	2
Brewster	11
Dennis	33
Harwich	112
Eastham	2
Hyannis	2
Marshfield	1
Orleans	1
Sandwich	9
Yarmouth	25
Worcester	1
Total	199

FY20	CHATHAM RESIDENT STUDENTS FY20	HARWICH RESIDENT STUDENTS FY20	SCHOOL CHOICE STUDENTS FY20	TOTAL STUDENTS FY20
CHATHAM ELEMENTARY				
Pre K	14	2	0	16
K	31	2	1	34
Grade 1	26	2	6	34
Grade 2	23	5	3	31
Grade 3	31	7	8	46
Grade 4	32	5	6	43
Total	157	23	24	204
HARWICH ELEMENTARY				
Pre K	1	52	0	53
Kindergarten	1	76	11	88
Grade 1	0	78	11	89
Grade 2	0	103	13	116
Grade 3	3	90	7	100
Grade 4	2	87	17	106
Total	7	486	59	552
MRMS				
Grade 5	35	101	26	162
Grade 6	23	86	27	136
Grade 7	38	123	22	183
Total	98	313	70	481
MRHS				
Grade 8	22	89	22	133
Grade 9	27	77	24	128
Grade 10	30	77	24	131
Grade 11	23	74	20	117
Grade 12	23	81	20	124
Sped Gr 15	1	5	0	6
Total	126	403	110	639
District Total	388	1225	263	1876
Out of District	5	10	0	15
Total	393	1235	263	1891

Δ	FY21	CHATHAM RESIDENT STUDENTS FY21	HARWICH RESIDENT STUDENTS FY21	SCHOOL CHOICE STUDENTS FY21	TOTAL STUDENTS FY21	Δ
	CHATHAM ELEMENTARY					
-5	Pre K	4	0	0	4	-12
0	K	9	4	3	16	-18
2	Grade 1	33	2	1	36	2
-14	Grade 2	23	2	5	30	-1
4	Grade 3	20	8	3	31	-15
-12	Grade 4	25	8	8	41	-2
-25	Total	114	24	20	158	-46
	HARWICH ELEMENTARY					
0	Pre K	3	14	0	17	-36
-2	Kindergarten	0	83	3	86	-2
-20	Grade 1	1	67	10	78	-11
19	Grade 2	0	75	13	88	-28
0	Grade 3	3	91	12	106	6
-1	Grade 4	2	93	7	102	-4
-4	Total	9	423	45	477	-75
	MRMS					
12	Grade 5	37	93	23	153	-9
-45	Grade 6	33	104	21	158	22
50	Grade 7	23	91	26	140	-43
17	Total	93	288	70	451	-30
	MRHS					
-11	Grade 8	33	123	25	181	48
-8	Grade 9	15	78	19	112	-16
18	Grade 10	26	75	23	124	-8
-16	Grade 11	30	78	25	133	16
10	Grade 12	22	78	21	121	-3
1	Sped Gr 15	2	4	0	6	0
-6	Total	128	436	113	677	37
	District Total	344	1171	248	1763	
2	Out of District	6	8		14	0
	Total	350	1179	248	1777	

FY22	CHATHAM RESIDENT STUDENTS FY22	HARWICH RESIDENT STUDENTS FY22	SCHOOL CHOICE STUDENTS FY22	TOTAL STUDENTS FY22	Δ
CHATHAM ELEMENTARY					
Pre K	0	0	0	0	-4
K	29	0	3	32	16
Grade 1	12	4	3	19	-17
Grade 2	33	1	1	35	5
Grade 3	21	1	7	29	-2
Grade 4	19	7	4	30	-11
Total	114	13	18	145	-13
HARWICH ELEMENTARY					
Pre K	6	29	0	35	18
Kindergarten	0	74	8	82	-4
Grade 1	0	91	3	94	16
Grade 2	1	66	14	81	-7
Grade 3	0	75	13	88	-18
Grade 4	3	98	11	112	10
Total	10	433	49	492	15
MRMS					
Grade 5	33	98	19	150	-3
Grade 6	32	93	22	147	-11
Grade 7	34	102	23	159	19
Total	99	293	64	456	5
MRHS					
Grade 8	25	90	31	146	-35
Grade 9	29	98	23	150	38
Grade 10	20	68	23	111	-13
Grade 11	28	73	23	124	-9
Grade 12	30	78	24	132	11
Sped Gr 15	1	5	1	7	1
Total	133	412	125	670	-7
District Total	356	1151	256	1763	
Out of District	4	8	0	12	-2
Total	360	1159	256	1775	

FY23	CHATHAM RESIDENT STUDENTS FY23	HARWICH RESIDENT STUDENTS FY23	SCHOOL CHOICE STUDENTS FY23	TOTAL STUDENTS FY23	Δ
CHATHAM ELEMENTARY					
Pre K	0	0	0	0	0
K	21	2	4	27	-5
Grade 1	27	1	4	32	13
Grade 2	12	5	3	20	-15
Grade 3	37	2	1	40	11
Grade 4	22	1	9	32	2
Total CES	119	11	21	151	6
HARWICH ELEMENTARY					
Pre K	7	36	0	43	8
Kindergarten	0	72	9	81	-1
Grade 1	0	75	10	85	-9
Grade 2	0	87	6	93	12
Grade 3	1	66	17	84	-4
Grade 4	2	77	12	91	-21
Total HES	10	413	54	477	-15
MRMS					
Grade 5	26	110	14	150	0
Grade 6	35	92	17	144	-3
Grade 7	34	88	23	145	-14
Total MS	95	290	54	439	-17
MRHS					
Grade 8	40	111	19	170	24
Grade 9	24	88	27	139	-11
Grade 10	31	96	25	152	41
Grade 11	19	70	24	113	-11
Grade 12	25	71	25	121	-11
Sped Gr 15	1	6	0	7	0
Total HS	140	442	120	702	32
District Total	364	1156	249	1769	
Out of District	4	8	0	12	
Total	368	1164	249	1781	

FY24	CHATHAM RESIDENT STUDENTS FY24	HARWICH RESIDENT STUDENTS FY24	SCHOOL CHOICE STUDENTS FY24	TOTAL STUDENTS FY24	Δ
CHATHAM ELEMENTARY					
Pre K	0	0	0	0	0
K	20	3	7	30	3
Grade 1	21	3	6	30	-2
Grade 2	23	1	5	29	9
Grade 3	14	4	3	21	-19
Grade 4	32	5	2	39	7
Total CES	110	16	23	149	-2
HARWICH ELEMENTARY					
Pre K	7	58	0	65	22
Kindergarten	0	56	3	59	-22
Grade 1	1	72	5	78	-7
Grade 2	1	70	10	81	-12
Grade 3	0	92	7	99	15
Grade 4	2	62	18	82	-9
Total HES	11	410	43	464	-13
MRMS					
Grade 5	24	80	20	124	-26
Grade 6	26	99	17	142	-2
Grade 7	34	97	17	148	3
Total MS	84	276	54	414	-25
MRHS					
Grade 8	35	102	22	159	-11
Grade 9	30	93	16	139	0
Grade 10	25	85	26	136	-16
Grade 11	33	102	28	163	50
Grade 12	20	68	28	116	-5
Sped Gr 15	2	3	1	6	-1
Total HS	145	453	121	719	17
District Total	350	1155	241	1746	-23
Out of District	6	11	0	17	
Total	356	1166	241	1763	

FY25	CHATHAM RESIDENT STUDENTS FY25	HARWICH RESIDENT STUDENTS FY25	SCHOOL CHOICE STUDENTS FY25	TOTAL STUDENTS FY25
CHATHAM ELEMENTARY				
Pre K	9	1	0	10
K	16	2	2	20
Grade 1	21	3	6	30
Grade 2	23	3	6	32
Grade 3	25	3	7	35
Grade 4	11	5	3	19
Total CES	105	17	24	146
HARWICH ELEMENTARY				
Pre K	2	39	0	41
Kindergarten	0	82	0	82
Grade 1	0	58	4	62
Grade 2	0	76	8	84
Grade 3	0	70	10	80
Grade 4	0	93	7	100
Total HES	2	418	29	449
MRMS				
Grade 5	35	67	19	121
Grade 6	28	82	23	133
Grade 7	25	101	15	141
Total MS	88	250	57	395
MRHS				
Grade 8	34	92	18	144
Grade 9	30	92	24	146
Grade 10	35	96	19	150
Grade 11	26	82	26	134
Grade 12	29	95	33	157
Sped Gr 15	2	4	1	7
Total HS	156	461	121	738
District Total	351	1146	231	1728
Out of District	4	11	0	15
Total	355	1157	231	1743

School Attending Children Report 24-25

School	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
Trinity Christian Academy	1			1		1											2				2		1				0	9	9	
Tabor Academy																												0	2	
Falmouth Academy																												0	0	
Cape Cod Academy					1																						6	6		
Luxford School	3	4	2	3	1	2		2	1			2					2						1	2	1	2	6	14	20	
St Francis Xavier						2		1																			0	0	0	
St Paul X																												0	0	
John Paul II																												0	0	
Cape Cod Christian Academy	2	1	1	1		1	1		2		2			1	1	1			2				2			2	10	12	51	
Total Private	3	7	3	5	2	6	1	4	6	4	0	4	6	2	1	2	2	2	0	2	2	8	2	3	4	2	3	8	18	47
Home School	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
	1		1	2		6	1	4	6	4	0	4	6	2	1	2	2	2	0	2	2	8	2	3	4	2	3	8	18	47
Cherish Out																														
Stargate Charter	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
	1		1	2		6	1	4	6	4	0	4	6	2	1	2	2	2	0	2	2	8	2	3	4	2	3	8	18	47
Uplightzone																														
MAP																														
Total Charter	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Cherish Out																														
Barnstable																														
D-Y																														
Eastham																														
Falmouth																														
Neural																														
Marblehead																														
Promised																														
Spaulding																														
Griffin/Commonwealth Virtual																														
Truro																														
TECOA																														
Total District	0	1	1	3	6	4	0	1	0	0	0	4	6	4	1	3	1	1	1	4	4	10	4	19	3	14	0	4	6	
Signed Placements	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
	1		1	2		6	1	4	6	4	0	4	6	2	1	2	2	2	0	2	2	8	2	3	4	2	3	8	18	47
Private																														
Collaborative																														
Total Signed Placements	0	0	0	0	0	0	0	0	0	0	0	1	0	1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Monrovia																														
Alondra Monrovia	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
	17	83	21	61	24	77	75	72	12	95	15	85	28	83	24	99	35	92	79	80	95	36	78	87	94	141	1894	1435		
Total Students in Towns by Grade	K-C	K-H	1-C	1-H	2-C	2-H	3-C	3-H	4-C	4-H	5-C	5-H	6-C	6-H	7-C	7-H	8-C	8-H	9-C	9-H	10-C	10-H	11-C	11-H	12-C	12-H	C	H	Total	
	20	91	28	71	26	95	29	82	12	105	36	80	28	95	28	116	40	110	37	118	52	139	38	114	37	140	1	1	1466	
% Enrolled in District	62%	91%	80%	88%	82%	81%	55%	88%	100%	95%	77%	81%	100%	88%	97%	84%	80%	83%	87%	87%	87%	89%	74%	72%	76%	87%			87%	

Data pulled from DESE Chapter 70 State Aid and Spending archives

<https://www.doi.org/doi/10.2196/jmir.2019.19111>

[illegible]

Appendix B: Municipal general fund spending on education compared to total municipal spending

From DESE Local Contribution Study (December 2020)

<https://www.doe.mass.edu/research/reports/2020/12local-contribution-study.docx>

Cape, Towns Near the Bridges, and Nantucket

City/town	FY07			FY19			Education % Total General Fund Change FY07 to FY19
	Education Spending (\$ millions)	Total General Fund Spending (\$ millions)	Education % Total General Fund	Education Spending (\$ millions)	Total General Fund Spending (\$ millions)	Education % Total General Fund	
Barnstable	\$61.60	\$121.35	50.80%	\$80.93	\$171.07	47.30%	-3.50%
Bourne	\$24.69	\$53.54	46.10%	\$32.02	\$76.99	41.60%	-4.50%
Brewster	\$15.40	\$33.62	45.80%	\$21.05	\$42.79	49.20%	3.40%
Chatham	\$8.49	\$34.61	24.50%	\$9.36	\$43.97	21.30%	-3.20%
Dennis	\$14.70	\$42.13	34.90%	\$18.29	\$59.68	30.70%	-4.20%
Eastham	\$7.38	\$18.00	41.00%	\$9.72	\$31.41	31.00%	-10.00%
Falmouth	\$45.95	\$99.71	46.10%	\$60.62	\$156.96	38.60%	-7.50%
Harwich	\$17.93	\$48.57	36.90%	\$27.78	\$67.46	41.20%	4.30%
Mashpee	\$21.59	\$46.58	46.40%	\$29.06	\$65.58	44.30%	-2.10%
Nantucket	\$21.89	\$68.72	31.80%	\$33.71	\$101.96	33.10%	1.30%
Orleans	\$7.30	\$22.67	32.20%	\$9.96	\$38.68	25.80%	-6.40%
Plymouth	\$82.31	\$157.44	52.30%	\$127.43	\$262.12	48.60%	-3.70%
Provincetown	\$4.79	\$19.91	24.00%	\$6.22	\$38.76	16.10%	-7.90%
Sandwich	\$33.60	\$63.87	52.60%	\$47.77	\$92.23	51.80%	-0.80%
Truro	\$3.95	\$13.03	30.30%	\$6.66	\$20.88	31.90%	1.60%
Wareham	\$30.19	\$53.55	56.40%	\$46.77	\$79.16	59.10%	2.70%
Wellfleet	\$4.24	\$14.32	29.60%	\$6.60	\$22.14	29.80%	0.20%
Yarmouth	\$22.18	\$53.89	41.20%	\$36.38	\$80.44	45.20%	4.00%
State Avg			51.27%			50.05%	-1.23%

Demographic Trends, Locally and Regionally

from DESE Enrollment by Selected Population Annual Report (District level)

<https://profiles.doe.mass.edu/statereport/selectedpopulations.aspx>

Monomoy (combining Harwich and Chatham data for the years prior to 2013)							
Year	Enrollment	% White	% Low Income	% ESL	% ELL	% SPED	
2024	1746	73.9	38.7	11.5	4.7	19.4	
2014	1869	82.7	22.4	6.2	3.5	15.7	
2004	2255	95.0	12	2.8	1.2	14.5	
1994	2037	96.4	10.8	0.7	0.0	14.5	
Barnstable Public							
Year	Enrollment	% White	% Low Income	% ESL	% ELL	% SPED	
2024	4817	50.1	53.3	35.7	23.4	17.9	
2014	4900	77.7	35.7	12.6	6.5	14.7	
2004	5586	85.7	25	6.4	4.2	11.8	
1994	6557	89.8	17	2.6	1.3	13.8	
State Averages							
State Averages		% White	% Low Income	% ESL	% ELL	% SPED	
2024		51.5	42.1	27.2	13.9	20.6	



MASSACHUSETTS
Department of Elementary
and Secondary Education

Pedro Martinez | Commissioner



School Finance: Chapter 70 Program

FY26 Chapter 70 Aid and Required Contribution Calculations
July 7, 2025

This document was prepared by the Massachusetts Department of Elementary and Secondary Education
Pedro Martinez, Commissioner

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FY26 Chapter 70 aid and required contribution calculations

Chapter 70 is the Commonwealth's program for ensuring adequate and equitable PK–12 education funding. It determines an adequate spending level for each school district (the foundation budget). It then uses each community's property values and residents' incomes to determine how much of the foundation budget should be funded from local property taxes. Chapter 70 state aid pays for the remaining amount.

Summary of how the formula works

The first step in the formula is to calculate a foundation budget for each school district, which represents the minimum spending level needed to provide an adequate education. The foundation budget is adjusted each year to reflect changes in the district's enrollment; changes in student demographics (grade levels, low-income status, and English language proficiency); inflation; and geographical differences in wage levels.

A target local contribution establishes an ideal goal for how much each city and town should contribute toward its foundation budget, based on the municipality's wealth. Two measures of municipal wealth are used: aggregate property values and aggregate personal income, with each given equal weight. The target is recalculated each year based on the most recent income and property valuations.

The target calculations assume that local contributions in total should cover 59 percent of the statewide foundation budget (target local share), with state aid covering the remaining 41 percent (target aid share). The target local share and target aid share for any individual city or town will vary in proportion to the municipality's wealth. The target calculation also includes a maximum local share of 82.5 percent, thus ensuring that all communities will get some minimum amount of state funding.

The required local contribution for each municipality is based on the previous year's required contribution, and includes some transition factors so that the shift toward the target levels occurs over a period of several years.

Municipalities whose local contribution requirements are higher than their targets will see a reduction in the requirement of 100 percent of the amount above the target. Municipalities whose local contribution requirements are lower than their targets will continue to see their requirements increase by the municipal revenue growth factor (MRGF). If they are more than 2.5 percent below their target, an increment of either 1 or 2 percent is added to their growth factor. In addition, the local contribution requirements for cities and towns with combined effort yields greater than 175 percent of foundation are set at 82.5 percent of foundation, see Appendix A for a more detailed explanation.

In FY26, the Chapter 70 aid calculation begins with each district's FY25 Chapter 70 amount. If the sum of that amount and the required local contribution is less than the district's foundation budget, then foundation aid is added to cover the gap; 96 districts

receive foundation aid in FY26. Otherwise, districts receive minimum aid increases of \$150 per pupil.

Each district must spend the sum of its required district contribution and its Chapter 70 aid. This sum is referred to as the district's net school spending requirement.

Charter school tuition rates also rely on foundation budgets calculated for each sending district's pupils at each charter school.

How foundation budgets are calculated

In Massachusetts, the definition of an adequate spending level for a school district is called its foundation budget. The goal of the Chapter 70 formula is to ensure that every district has sufficient resources to meet its foundation budget spending level, through an equitable combination of local property taxes and state aid. The foundation budget is perhaps the most important factor used in calculating a district's Chapter 70 state education aid.

The foundation budget has its origins in three milestones:

- The Massachusetts Business Alliance for Education's (MBAE) release of *Every Child a Winner*, an influential report that laid the groundwork for what would ultimately become the 1993 Education Reform Act. In the report, MBAE calls for "high standards, accountability for performance, and equitable distribution of resources among school districts."
- *McDuffy v. Secretary of the Executive Office of Education* (1993), where the Supreme Judicial Court held that the education clause imposes on the Commonwealth "an enforceable duty to provide an education for all students regardless of wealth through the public schools."
- The 1993 Education Reform Act, "which for the first time, established a required 'foundation' level of spending for each district in the Commonwealth that was to be reached by the establishment of both a state-mandated, required local contribution and a supplemental amount of state aid."

Foundation enrollment is a key factor in determining a school district's foundation budget and Chapter 70 state education aid.

The Massachusetts Department of Elementary and Secondary Education (DESE) computes foundation enrollment using student-specific data submitted by each Massachusetts school district through the Student Information Management System (SIMS).

Foundation enrollment is based on a count of the students that a school district is financially responsible for on October 1 of any given year. Those who leave in September or arrive after October 1 are not counted. A student who happens to be absent on October 1 is included nonetheless; this is a measure of enrollment, not attendance. Enrollment plays an important role not just because of the total number of pupils, but also because there are differences in the costs associated with various educational programs, grade levels, and student needs. Districts differ greatly in the percentages of their student population that fall into these enrollment categories.

Because of the timing involved in the state budget process, foundation enrollment lags by one year. For example, FY26 Chapter 70 relies on October 1, 2024 pupil counts.

In FY26, foundation enrollment is 905,307, a decrease of 265 or -0.03 percent from FY25. Foundation enrollment decreased for 195 districts, while 121 districts experienced enrollment increases.

Foundation enrollment is comprised primarily of local resident students attending their community's local or regional school district. While Massachusetts cities and towns serve their resident students through a number of different governance structures, the most common structure is for a community to operate its own PK–12 system and to belong to a vocational regional school district. About 93 percent of publicly funded schoolchildren enroll in the school district directly associated with their cities and towns of residence, while 7 percent of public schoolchildren attend in settings other than their home districts, including:

- Students attending charter schools;
- Students attending another public school district through interdistrict school choice;
- Special education students for whom their home district pays tuition to a private special education school or another public school district with an appropriate program; and
- Vocational students attending a school where their town is not a member when the home vocational district does not offer the program they are seeking (Chapter 74 non-resident tuition program).

There are two exceptions to the general rule that home districts pay tuition for out-of-district placements.

- Students participating in the METCO racial imbalance program count in the district where they are educated. Home districts such as Boston and Springfield do not pay tuition for these pupils.
- Children of non-resident teachers, where the district's collective bargaining agreements allow them to attend at no cost. Again, home districts do not pay tuition; the districts where the teachers work have chosen to take on the fiscal responsibility, and the Commonwealth shares in the cost.

All students counted in foundation enrollment are assigned to a base enrollment category to calculate each district's foundation budget.

A district's foundation budget is derived by multiplying the number of pupils in 15 enrollment categories by cost rates in 11 functional areas. In computing the foundation budget, each pupil must first be assigned to one of the following 7 categories. Based on the pupil-specific information submitted by each school district through SIMS, a student is classified as being in one of the following base enrollment categories.

Table 1: Base foundation budget enrollment categories

Column	Description
1	Regular or special education pre-school
2	Regular or special education half-day kindergarten
3	Regular or special education full-day kindergarten
4	Regular or special education elementary (grades 1–5)
5	Regular or special education junior high/middle (grades 6–8)
6	Regular or special education senior high (grades 9–13) ¹
7	Vocational education (grades 9–12) ²

The following rules apply in cases where it may not be clear which category is appropriate, or whether a pupil should be included in foundation enrollment at all:

- If parents/guardians pay tuition for kindergartners to attend the optional second half of a full-day kindergarten program, they are counted as half-day pupils.
- Students in vocational education must be in approved Chapter 74 programs, otherwise they are placed in the regular education senior high category.

¹ Special education pupils in life-skills and similar programs beyond the 9–12 curriculum are listed as being in grade 13 and counted as high school students.

² If a town is a member of a regional vocational district, its resident pupils at that district are not counted in local district enrollment. The vocational district reports those pupils and Chapter 70 aid goes directly to the vocational district. Post-graduate and post-secondary pupils in programs run by vocational districts may be counted if they pay less than the state-approved tuition rate.

Costs for special education, English learners (ELs), and low-income students are treated as costs above the base.

In addition to the base enrollment categories, there are 6 incremental enrollment categories that are intended to reflect the additional resources needed to educate students with disabilities, English learners (ELs), and low-income students. Columns 8 through 13 reflect these incremental costs above the base. These students are already counted in columns 1 through 7, and are therefore not added to total enrollment:

Table 2: Assumed and above base foundation budget enrollment categories

Column	Description
8	Assumed in-district special education enrollment
9	Assumed out-of-district special education enrollment
10	English learners (ELs) (grades PK–5)
11	English learners (ELs) (grades 6–8)
12	English learners (ELs) (grades 9–13)
13	Low-income students

- Assumed in-district special education enrollment (column 8) is set at 3.97 percent of foundation enrollment (not including pre-kindergarten and vocational pupils) and 4.97 percent of vocational enrollment. These headcounts are assumed rather than actual student counts of pupils, an approach that is practiced in other states around the country. This method is in place to prevent over-identification of special education students for the purpose of fiscal gain.
- Assumed out-of-district special education enrollment (column 9) is set at 1 percent of total foundation enrollment (again not including pre-kindergarten and vocational pupils).
- English learner (EL) status (columns 10–12) depends on a student’s home language and English language proficiency. EL headcounts are assigned to the district where the pupils are actually enrolled and where the extra costs occur, even if they are tuitioned-in from another district.
- A student’s low-income status (column 13) is based on three eligibility categories:
 - Students identified as participating in state public assistance programs, including the Supplemental Nutrition Assistance Program (SNAP), Transitional Aid to Families with Dependent Children (TAFDC), foster care; or MassHealth (Medicaid) up to 185 percent of the federal poverty level (FPL).
 - Students certified as low income through the new supplemental data collection process (up to 185 percent of the FPL); or

- Students reported by a district as homeless through the McKinney-Vento Homeless Education Assistance program application.

Low-income headcounts are assigned to the district where the pupils are actually enrolled and where the extra costs occur, even if they are tuitioned-in from another district. Districts are assigned to low-income groups based on the share of low-income students as a percent of enrollment, with districts in higher groups receiving more funding than districts in lower groups.

After a district's foundation enrollment is calculated, it is applied to specific cost rates in eleven functional areas to arrive at the upcoming year's foundation budget.

These cost rates are based on a model school budget developed by a group of superintendents and an economist in the early 1990s. They reflect the major cost centers of school spending:

Table 3: Foundation expenditure categories

Administration
Instructional leadership
Classroom and specialist teachers
Other teaching services
Professional development
Instructional equipment and technology
Guidance and psychological services
Pupil services
Operations and maintenance
Employee benefits and fixed charges
Special education tuition

Foundation budget rates reflect differences in the cost of educating different types of students. Each pupil generates a specific cost in each functional category. The costs are higher at the upper grades. They are also higher in vocational programs. Special education, English learner, and low income increments add substantial costs as well.

These headcounts are applied to specific cost rates to determine foundation budgets. A district's total foundation enrollment equals the sum the above full-day headcounts plus the students in pre-kindergarten and half-day kindergarten divided by two (to reflect their relative full-time equivalency).

The total statewide foundation budget in FY26 is \$15.31 billion, an increase of \$779.7 million or 5.36 percent over FY25.

Each district's FY26 calculations can be seen on the foundation budget report available in the Chapter 70 formula spreadsheet, see the example using Plymouth's foundation budget below. The columns going across the page are the 13 enrollment categories used in the foundation budget calculation.

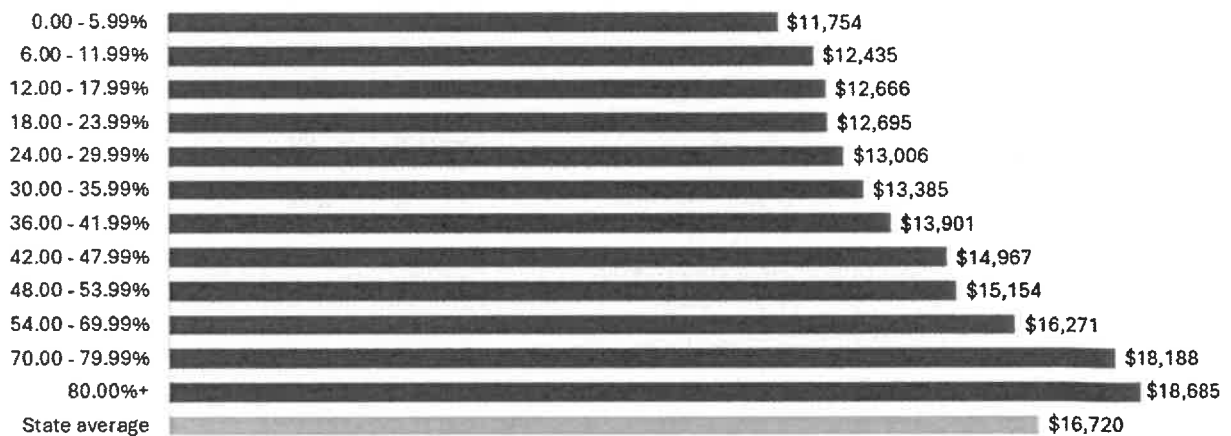
Appendix B: FY26 foundation budget rates

	Administration	Instructional Leadership	Classroom and Specialist Teachers	Other Teaching Services	Professional Development	Instructional Equipment & Tech	Guidance and Psychological	Pupil Services	Operations and Maintenance	Employee Benefits/Fixed Charges	Special Ed Tuition	Total, all categories
Base Rates												
Pre-school	228.66	412.96	1,893.58	485.65	74.89	274.06	206.70	54.80	525.83	909.02	0.00	5,066.15
Kindergarten (half)	228.66	412.96	1,893.58	485.65	74.89	274.06	206.70	54.80	525.83	909.02	0.00	5,066.15
Kindergarten (full)	457.31	825.94	3,787.16	971.33	149.86	548.15	413.42	105.64	1,051.64	1,818.01	0.00	10,132.46
Elementary	457.31	825.94	3,787.11	971.33	149.88	548.15	413.42	164.43	1,051.64	1,818.02	0.00	10,187.23
Junior/Middle	457.31	825.94	3,332.67	699.22	162.46	548.15	428.63	268.61	1,140.11	1,952.67	0.00	9,815.77
High School	457.31	825.94	4,900.96	582.09	157.53	877.03	459.83	619.39	1,105.46	1,728.92	0.00	11,714.46
Vocational	457.31	825.94	8,331.69	582.09	260.44	1,534.79	459.83	619.39	2,068.92	2,213.89	0.00	17,354.29
Special education in-district	3,156.17	0.00	10,414.58	9,723.94	502.39	438.50	0.00	0.00	3,525.59	4,853.17	0.00	32,114.34
Special education tuitioned-out	3,900.17	0.00	0.00	59.58	0.00	0.00	0.00	0.00	0.00	0.00	37,030.05	40,989.80
Incremental Rates												
English learners PK-5	115.25	201.68	1,411.71	201.68	57.61	144.04	86.43	28.82	345.72	348.80	0.00	2,941.74
English learners 6-8	123.15	215.48	1,508.36	215.48	61.56	153.91	92.36	30.79	369.39	372.67	0.00	3,143.15
English learners high school/vocational	140.07	245.13	1,715.83	245.13	70.03	175.08	105.05	35.02	420.21	423.94	0.00	3,575.49
Low-income group 1	56.36	267.04	2,606.95	0.00	126.48	19.39	105.56	548.54	0.00	464.11	0.00	4,194.43
Low-income group 2	59.38	281.33	2,746.29	0.00	133.24	20.43	111.20	577.86	0.00	488.93	0.00	4,418.66
Low-income group 3	62.39	295.61	2,885.64	0.00	140.00	21.47	116.85	607.18	0.00	513.73	0.00	4,642.87
Low-income group 4	65.40	309.87	3,024.98	0.00	146.76	22.49	122.49	636.50	0.00	538.55	0.00	4,867.04
Low-income group 5	68.41	324.15	3,164.32	0.00	153.53	23.53	128.14	665.81	0.00	563.35	0.00	5,091.24
Low-income group 6	76.09	360.53	3,519.46	0.00	170.74	26.18	142.51	740.54	0.00	626.58	0.00	5,662.63
Low-income group 7	83.32	394.78	3,853.90	0.00	186.97	28.66	156.06	810.92	0.00	686.11	0.00	6,200.72
Low-income group 8	90.56	429.05	4,188.34	0.00	203.20	31.16	169.60	881.28	0.00	745.65	0.00	6,738.84
Low-income group 9	97.79	463.31	4,522.79	0.00	219.42	33.63	183.14	951.66	0.00	805.19	0.00	7,276.93
Low-income group 10	105.01	497.57	4,857.23	0.00	235.65	36.12	196.68	1,022.02	0.00	864.75	0.00	7,815.03
Low-income group 11	116.63	552.58	5,394.34	0.00	261.70	40.12	218.44	1,135.04	0.00	960.36	0.00	8,679.21
Low-income group 12	128.24	607.61	5,931.45	0.00	287.76	44.11	240.18	1,248.06	0.00	1,055.97	0.00	9,543.38

When districts' foundation budgets are presented in per pupil terms, there is considerable variation.

The FY26 statewide average foundation budget per pupil is \$16,917. Excluding vocational districts, the average is \$16,720 per pupil. Foundation budgets are weighted to assume greater student needs and higher costs in districts that serve higher percentages of low-income students. For example, excluding vocational districts, the foundation budget per pupil in group 12 districts is \$6,931 per pupil higher than group 1 districts, see figure below.

Foundation budget per pupil, by low-income % range



Note: Figure does not include vocational or agricultural districts.

The wage adjustment factor (WAF) gives a district credit for having higher school costs if it is located in a geographic area where average wages are higher than in other areas of the state.

The wage factor is calculated using the latest available average wage data supplied by the state's Department of Employment. The factor reflects a town's own average, but is more weighted to the average of the labor market area (LMA) where the town is located. There are real differences in these averages, which represent the combined total for all industries both private and public.

Table 4: Wages by labor market area, sorted by average wage (2023)

Labor Market Area	Total Wages	Employment	Average Wages
Boston-Cambridge-Newton MA NECTA Division	\$205,920,834,633	1,882,620	\$109,380
Worcester MA-CT Metropolitan NECTA	\$17,594,882,662	255,946	\$68,745
Springfield MA-CT Metropolitan NECTA	\$16,542,329,956	274,086	\$60,355
Framingham MA NECTA Division	\$15,950,832,843	168,481	\$94,674
Lowell-Billerica-Chelmsford MA-NH NECTA Division	\$12,672,617,812	151,321	\$83,747
Peabody-Salem-Beverly MA NECTA Division	\$6,636,493,432	92,222	\$71,962
Barnstable Town MA Metropolitan NECTA	\$6,635,418,790	107,606	\$61,664
Providence-Warwick RI-MA Metropolitan NECTA	\$6,024,320,045	106,939	\$56,334
Brockton-Bridgewater-Easton MA NECTA Division	\$5,076,557,376	77,270	\$65,699
Taunton-Middleborough-Norton MA NECTA Division	\$4,148,332,114	60,971	\$68,038
New Bedford MA Metropolitan NECTA	\$4,014,033,047	65,715	\$61,082
Lawrence-Methuen Town-Salem MA-NH NECTA Division	\$3,876,834,445	60,972	\$63,584
Haverhill-Newburyport-Amesbury Town MA-NH NECTA Division	\$2,995,461,979	46,395	\$64,564
Leominster-Gardner MA Metropolitan NECTA	\$2,886,453,140	51,187	\$56,390
Lynn-Saugus-Marblehead MA NECTA Division	\$2,755,743,513	43,555	\$63,270
Pittsfield MA Metropolitan NECTA	\$2,439,653,757	39,321	\$62,045
Greenfield Town MA Micropolitan NECTA	\$828,433,793	15,413	\$53,749
Nantucket County/town MA	\$633,838,430	8,334	\$76,055
Vineyard Haven MA Micropolitan NECTA	\$629,915,997	9,144	\$68,888
Great Barrington MA LMA	\$547,877,402	9,771	\$56,072
North Adams MA-VT Micropolitan NECTA	\$534,612,024	9,485	\$56,364
Athol MA Micropolitan NECTA	\$319,477,665	6,611	\$48,325
Nashua NH-MA NECTA Division	\$115,973,226	1,972	\$58,810

Buckland MA LMA	\$75,890,255	1,814	\$41,836
State Total	\$319,856,818,336	3,547,151	\$90,173

A district's wage factor is a percentage that is applied to the eight salary-related functional categories in the foundation budget. The LMA for a district is compared to the state average and weighted at 80 percent. The town's own factor is weighted at 20 percent. The distance above or below the state average is then divided by three to determine the WAF.

Prior to FY00, districts in lower-wage areas saw significant reductions in their foundation budgets, by as much as ten percent. Since then, annual budget language has cushioned districts from these reductions, to the point where beginning in FY04 only districts with above-average wages are affected by the WAF. Those below the average are set to 100 percent. In FY26, 103 municipalities in three labor market areas are affected by the WAF: Boston-Cambridge-Newton, Framingham, and Lowell-Billerica-Chelmsford.

A district's wage factor appears at the bottom of its foundation budget report in row 13. In the previous example, Plymouth has a WAF of 103.5 percent. Plymouth is in the Boston-Cambridge-Newton MA NECTA Division, which has above-average wages.

FY26 Foundation Budget: Massachusetts State Totals

After applying the wage factor, the statewide total for all school districts in FY26 is \$15.31 billion. Teaching makes up 43 percent, while the other five instructional categories (instructional leadership, other teaching services, professional development, instructional materials/technology, and guidance/psychological) make up 23 percent, a combined total of 66 percent.

Table 5: FY26 foundation budget totals by category

Categories	Foundation budget totals	%
Classroom & Specialist Teachers	\$6,581,774,492	43%
Employee Benefits & Fixed Charges	\$2,236,763,694	15%
Operations & Maintenance	\$1,243,532,958	8%
Other Teaching Services	\$1,110,618,821	7%
Instructional Leadership	\$1,002,537,257	7%
Pupil Services	\$743,640,921	5%
Instructional Materials, Equipment & Technology	\$682,170,239	4%
Administration	\$633,281,823	4%

Guidance & Psychological Services	\$495,000,369	3%
Special Education Tuition	\$309,719,338	2%
Professional Development	\$275,794,247	2%
Total	\$15,314,834,159	100%

The six instructional categories are shaded blue.

How the Student Opportunity Act changes the foundation budget

The FY26 Chapter 70 program reflects the second year of implementation of An Act Relative to Educational Opportunity for Students, commonly known as the Student Opportunity Act (the SOA). The SOA makes significant changes to the Chapter 70 formula, based in large part on the recommendations of the Foundation Budget Review Commission (FBRC). The updated formula is also codified in Chapter 70 of the general laws.

The SOA establishes new, higher foundation budget rates in five areas: benefits and fixed charges, guidance and psychological services, special education out-of-district tuition, English learners, and low-income students, all to be phased in over multiple years. During FY24 and FY25, the rates were increased each year in all five areas by 1/6th of the gap between the FY21 rates and the final target rates. In FY26, the rates have been increased by an additional 1/6th of the gap, resulting in an overall increase of 5/6th or two thirds toward the targets since FY21.

The number of tiers for the low-income increment rates is increased from ten to twelve; districts with higher concentrations of low-income students benefit from higher rates.

An inflation increase of 1.93 percent has been applied to all other foundation budget rates, based on the U.S. Department of Commerce's state and local government price deflator and capped at the 4.50 percent maximum set in the SOA. In accordance with the Chapter 70 statute, inflation is defined as the ratio of the current year's third-quarter inflation index (2024 = 128.474) to the prior year's third-quarter index (2023 = 126.04) before applying the cap.

In addition, the SOA applies a special inflation rate to the employee benefits and fixed charges category. This is based on the enrollment-weighted, three-year average premium increase for all Group Insurance Commission plans; for FY26 the increase is 6.13 percent. The SOA does not set a maximum for the employee benefits inflation rate.

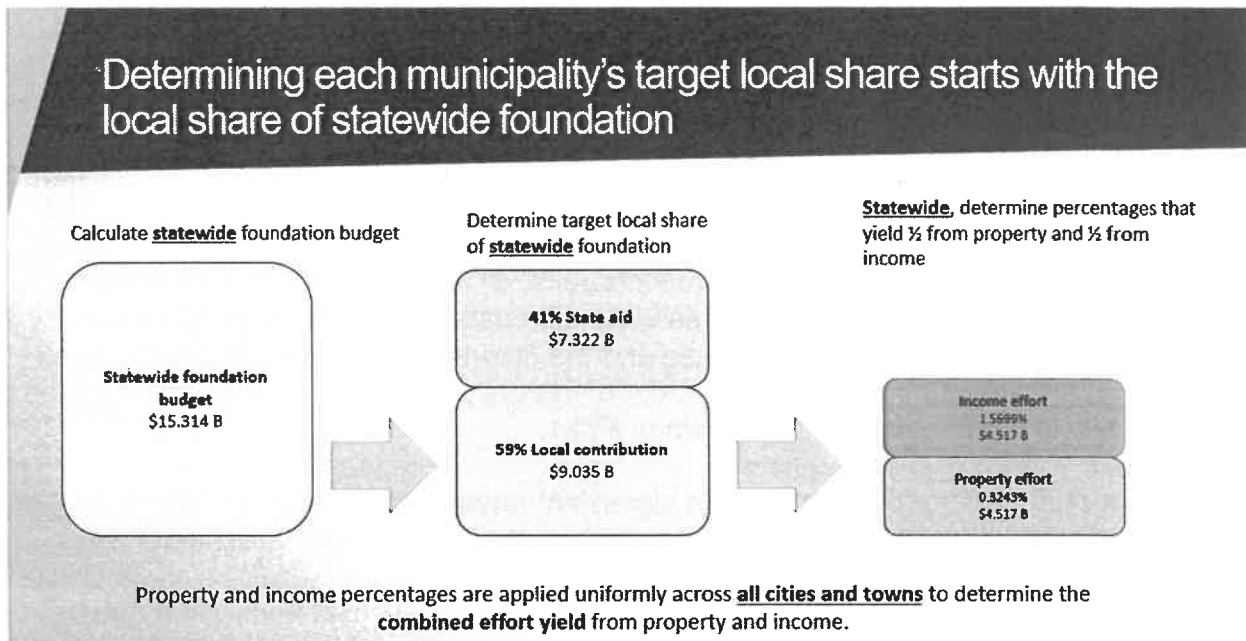
The SOA also adds a new minimum aid adjustment to the formula. This provides hold harmless aid to school districts that would otherwise have higher aid levels if the SOA were not implemented.

The SOA reinstates the definition of low-income enrollment used prior to FY17, based on 185 percent of the federal poverty level. It replaces the economically disadvantaged designation (based on 133 percent of the federal poverty level) used from FY17 through FY22. Statewide low-income enrollment for FY26 is 419,861.

The SOA also increases the assumed in-district special education enrollment to 5 percent for vocational students and 4 percent for non-vocational students over multiple years. In FY22, these assumed rates have been increased by 1/6th of the gap between the FY21 percentages and the final targets. In FY26, the rates have been increased by an additional 1/6th to 4.97 percent and 3.97 percent, respectively.

Appendix A: How required local contributions are calculated

Target contributions



The first step is to determine the statewide target local contribution level:

- The formula dictates that the statewide contribution goal must be funded equally from local property wealth and aggregate local income. The statewide target local contribution for all municipalities equals 59 percent of statewide foundation budgets. For FY26, that total is \$9.036 billion.
- Statewide, determine uniform percentages that—if applied uniformly to each municipality's aggregate total personal income and aggregate property value (equalized property valuation)—yield half of the statewide target local contribution from property and half from income.
- For FY26, the property percentage is set at 0.3243 percent and is applied to each municipality's 2024 aggregate equalized property valuation. The income percentage is set at 1.5699 percent and is applied to each municipality's aggregate total personal income, as reported to the Department of Revenue (DOR) by local residents for the 2022 calendar year.
- When these two factors are applied statewide, they yield a total target local contribution of \$9.036 billion with half (\$4.518 billion) coming from the property percentage and the other half from the income percentage.

Next, the formula sets a target local contribution for each municipality based on its income and its property values (more specifically, its equalized property valuation).

- The formula applies the property percentage and the income percentage to each individual municipality's aggregate property valuation and income, which determines the municipality's combined effort yield.

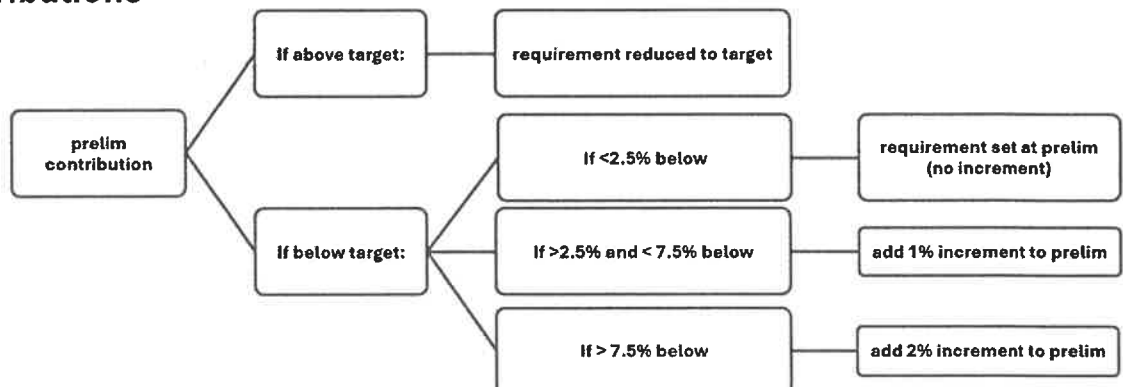
- Some municipalities have so much wealth, or a small enough student population, that their combined effort yield is excessive. The formula establishes a maximum local contribution of 82.5 percent of foundation budget, meaning that municipalities are not required to contribute more than 82.5 percent of their foundation budgets. In other words, the Commonwealth provides a minimum of 17.5 percent of foundation through state aid, even to the wealthiest communities.
- The target local contribution is equal to the combined effort yield unless the municipality's combined effort yield exceeds this maximum. In those cases, the target is set at the maximum level. In FY26, the formula assigns 192 communities their maximum local contribution (i.e., 82.5 percent of foundation).
 - In addition, municipalities with combined effort yields equal to or greater than 175 percent of foundation cannot have local contribution requirements less than 82.5 percent of foundation. This change impacts 17 communities, adding \$3.79 million to their contribution requirements.

Required contributions

Next, the formula uses these targets to determine required local contributions.

- First, increase (or decrease) the city or town's prior year (i.e, FY25) required local contribution by the municipal revenue growth factor (MRGF).
 - The MRGF has been calculated each year since FY94 by DOR and quantifies the most recent annual percentage change in each community's local revenues (such as the annual increase in the Proposition 2½ levy limit) that should be available for schools. The state average MRGF is 4.30 percent.
- The result of applying the MRGF to the FY25 required contribution is the FY26 preliminary local contribution.
- If the preliminary local contribution is greater than the target local contribution, contributions are brought down to target, closing 100 percent of the gap to determine the required local contribution. In FY26, this impacts contributions for 79 or 22 percent of the 351 cities and towns.
- If the preliminary local contribution is less than the target local contribution, the formula may augment the preliminary contribution by an increment to arrive at the required local contribution:
 - If the community is more than 7.5 percent below its target, the increment is 2 percent of the FY22 local contribution.
 - If it is between 2.5 and 7.5 percent, the increment is 1 percent.
 - If it is less than 2.5 percent, there is no additional increment.
- In FY26, 271 cities and towns have preliminary contributions that are below target by \$719.6 million. Those who fall below by more than 2.5 percent are required to make additional increments totaling \$61 million to get closer to their effort goals.
- Most cities and towns belong to at least one regional school district. Some operate a local district and are members of as many as three regionals. A municipality's total contribution is apportioned among the various districts to which it belongs, based on each district's share of the total foundation budget for all of the municipality's students.

Preliminary contributions are adjusted based on distance from target contributions



FY26 Chapter 70 Foundation Budget example

239 Plymouth

	1	2	Base Foundation Components					7	8	Incremental Costs Above the Base							13	14
			3	4	Junior/		6			9	10	11	12					
					Kindergarten -----	Middle								High School	English learners	English learners		
	Pre-school	Half-Day	Full-Day	Elementary			Vocational	In-District	Special Ed	Special Ed	English learners	English learners	English learners	English learners	English learners	English learners		
Foundation Enrollment	129	0	469	2,642	1,693	1,790	722		297	66	246	66	107	2,614	7,381			
1 Administration	30,530	0	221,985	1,250,500	801,324	847,235	341,734	970,191	266,421	29,344	8,412	15,512	225,421	5,008,609				
2 Instructional Leadership	55,136	0	400,924	2,258,508	1,447,257	1,530,178	617,200	0	0	51,350	14,719	27,147	1,068,073	7,470,493				
3 Classroom & Specialist Teachers	252,821	0	1,838,344	10,355,739	5,839,688	9,079,764	6,226,022	3,201,390	0	359,435	103,036	190,020	10,426,688	47,872,946				
4 Other Teaching Services	64,842	0	471,498	2,656,073	1,225,212	1,078,409	434,978	2,989,091	4,070	51,350	14,719	27,147	0	9,017,388				
5 Professional Development	9,999	0	72,744	409,842	284,671	291,848	194,619	154,432	0	14,668	4,205	7,755	505,845	1,950,630				
6 Instructional Materials, Equipment & Technology*	35,354	0	257,082	1,448,212	928,018	1,569,884	1,108,118	130,235	0	35,434	10,158	18,734	74,917	5,616,146				
7 Guidance & Psychological Services	27,598	0	200,680	1,130,485	751,069	851,904	343,617	0	0	22,006	6,309	11,634	422,219	3,767,520				
8 Pupil Services	7,317	0	53,221	449,629	470,673	1,147,513	462,852	0	0	7,338	2,103	3,878	2,193,936	4,798,459				
9 Operations & Maintenance	70,206	0	510,482	2,875,678	1,997,763	2,048,030	1,546,042	1,083,749	0	88,024	25,233	46,536	0	10,291,744				
10 Employee Benefits/Fixed Charges*	117,264	0	852,647	4,803,209	3,305,870	3,094,767	1,598,429	1,292,891	0	85,805	24,596	45,362	1,793,492	17,014,330				
11 Special Education Tuition*	0	0	0	0	0	0	0	0	2,443,983	0	0	0	0	2,443,983				
12 Total	671,065	0	4,879,608	27,637,875	17,051,546	21,539,532	12,873,611	9,821,978	2,714,474	744,753	213,492	393,724	16,710,592	115,252,250				
13 Wage Adjustment Factor	103.5%													15,615				
*The wage adjustment factor is applied to underlying rates in all functions except instructional equipment, benefits and special education tuition.																		
14 Low-income percentage	36.16%															1.2%		
15 Low-income group	7															14.5%		

Inequities in Monomoy's Elementary Per Pupil Spending and the Challenges with the Loss of Elementary Enrollment

Across the Cape, there has been a demographic shift, with towns having increasingly fewer young families with school-aged children. Lack of affordable housing, high costs of living, lack of affordable childcare options, and a growing "Airbnb" industry only exacerbate this demographic shift and loss of school-aged children. The rate of the attrition of young families varies by community, and over the past decade, the Town of Chatham has seen some of the greatest loss of year-round school-aged children.

On December 6, 2010, the simultaneous town meetings in Harwich and Chatham voted to regionalize their schools. Heading into the following academic year (FY12), Harwich Elementary School's enrollment was 579. Chatham Elementary School's enrollment was 279, just under half the HES enrollment. In FY12, a significant number of Harwich resident students (53) elected to attend CES through school choice, compared to a half-dozen Chatham resident students who attended HES. Complete elementary enrollment figures since regionalization can be found in Appendix 1.

Over the 10 years since regionalization, CES enrollment has fallen by 62 students, and HES enrollment has dropped by 67 students. While the total number loss of students was similar, HES started as a much larger school. CES enrollment is now just under a third of the HES enrollment. The loss of CES enrollment and Chatham resident students has escalated over the past four years (FY17 to present).

In the past decade, the enrollment at HES has dropped by 12%, and the school shrank from six classrooms of kindergarteners to five. By contrast, CES lost 39% of its enrollment over the past 10 years and contracted from three classrooms of kindergarteners to only one classroom this year. There are currently not enough elementary-aged students in Chatham to fill a single kindergarten classroom, so the district heavily relies on intra- and inter-district school choice to round out that kindergarten class. It is quite possible that in the next few years there will not be enough Chatham kindergarteners and School Choice applicants to fill even a single stand-alone kindergarten classroom.

Two dilemmas are becoming quite evident as CES enrollment declines, and both are exacerbated by the fact that CES enrollment is declining at a much higher rate than HES enrollment. First, there is a rapidly increasing inequity in per pupil spending between Monomoy's two elementary schools. Second, declining enrollment at CES potentially compromises our ability to provide enough grade-level peers to provide a rich social environment for students and CES teachers are increasingly lacking opportunities for professional collaboration within the school building.

Inequities of Per Pupil Spending

As the district came together in FY12, the budgeted per pupil spending at the two elementary schools was similar. The spending per student at CES was \$941 more than at HES, as shown in Table 1.

Ten years later, the FY21 budget finds smaller elementary school populations in both Monomoy elementary schools, sending per pupil spending upwards at each. This upward trend happens when a school's "fixed costs" (which include main office, custodial, nurse, and librarian salaries, heating and electrical costs, and maintenance expenses) are spread over fewer students. As CES enrollment has plummeted since FY17, its per pupil costs are nearly double what they were in FY12 -- during this time

period, the district has seen the difference in per pupil spending between CES and HES increase from about \$1,000 to nearly \$5,000 per student.

As the enrollment at CES declines, the amount Harwich taxpayers will be subsidizing the funding for CES will quickly escalate. By FY25, CES enrollment will likely decrease to about 100 students. This would result in per pupil school expenditures of around \$26,526, which will likely be nearly double the per pupil spending at HES, based on the projections in Table 1.

Table 1: Per Pupil Spending at Monomoy's Elementary Schools, FY12, FY21 & FY25

	FY12 School Budget	Number of Students	FY12 Per Pupil Spending
Chatham Elementary	\$ 2,499,028	265	\$9,430
Harwich Elementary	\$ 4,999,819	589	\$8,489
Difference in Per Pupil Spending			\$941

	FY21 School Budget	Number of Students	FY21 Per Pupil Spending
Chatham Elementary	\$2,869,394	170	\$16,879
Harwich Elementary	\$6,085,214	512	\$11,885
Difference in Per Pupil Spending			\$4,994

*Note: this is a
projection**

	FY25 School Budget	Number of Students	FY25 Per Pupil Spending
Chatham Elementary	\$2,652,551	100	\$26,526
Harwich Elementary	\$6,462,331	470	\$13,750
Difference in Per Pupil Spending			\$12,776

**Based on 2% annual increases and predicted staff reductions as enrollment contracts*

The inequity in per pupil spending is not that the district is spending more to educate students at CES. The educational program, curriculum, and offerings are painstakingly coordinated between the district's two elementary schools to ensure all Monomoy students have access to the same excellent quality of education and same educational options. The inequity happens in how the district's Regional Agreement assesses our two towns to educate students. Local tax dollars largely fund Monomoy's budget, with Harwich currently paying (in FY21) 74.35% of the district's operational costs, based on Harwich having a much larger 3-year average of foundation enrollment.

Some families from Harwich directly benefit from Chatham Elementary School. Since regionalization, between 14% and 19% of CES enrollment has been Harwich resident students. By contrast, only 1% to 2% of HES enrollment has come from Chatham resident students.

Despite the fact that a significant number of Harwich children attend CES, the Harwich taxpayers end up paying the bulk of the total per pupil spending difference at CES. The total per pupil spending difference has escalated significantly since FY17, and will escalate quickly and dramatically heading to FY25, as indicated in the Table 2.

Table 2: Total Per Pupil Spending Difference (CES vs. HES), FY12, FY21 & FY25

<u>In FY12</u>
\$94 per pupil difference X 265 CES pupils = \$249,365
\$249,365 X 74.35% = \$185,402
<u>In FY21</u>
\$4,994 per pupil difference X 170 CES pupils = \$848,980
\$848,980 X 74.35% = \$631,216
<u>In FY25</u>
\$12,776 X 100 CES pupils = \$1,277,587

How to Remedy This Inequity

The remedy involves amending the Regional Agreement, which requires the Selectmen in both towns and the School Committee to adopt a new assessment procedure that would need to be approved by Town Meetings in both communities. A working group of Selectmen and appointees from the towns, as well as Monomoy's School Committee and its appointees, could convene to develop a proposed remedy. Bringing this group together is one of our School Committee's 2020-2021 goals.

The remedy cannot simply be to increase enrollment at CES by moving Harwich resident children to CES (through intra-district school choice, redistricting, or creating upper and lower elementary schools). This would not provide relief to Harwich taxpayers, who would still be subsidizing the education of an ever-dwindling number of Chatham elementary-aged children. Mathematically, moving Harwich children to CES decreases enrollment at HES, thereby increasing HES per pupil costs – while the difference in per pupil spending at both elementary schools could be equalized doing this, it happens at the expense of the Harwich taxpayer. Empty classrooms at CES would simply become empty classrooms at HES. A fair remedy ultimately would require Chatham paying more towards the assessment to mitigate the real costs of running a very small elementary school in their town, with an enrollment far less than half that of HES.

Attached to this document are following appendices to inform this working group conversation:

- Appendix 1: Monomoy Elementary Enrollment FY12-FY21 and beyond
- Appendix 2: Number of Classrooms per Grade (FY12, FY20 & FY25)
- Appendix 3: Monomoy Elementary Budgets FY12-FY21 and beyond
- Appendix 4: Monomoy Elementary Per Pupil Spending FY12-FY21 and beyond

The Superintendent's Recommendation

The simplest and fairest way to deal with the dilemma of inequitable funding at the elementary level

would be to have each town pay for its own elementary school. This would require a change to the Regional Agreement. This would work well as long as there is no reconfiguration (redistricting or formation of upper and lower elementary schools). Appendix 4 provides an example of the FY21 Assessment if the towns paid for their own elementary schools, compared to how the Assessment was calculated following the Statutory Method. Using this alternative assessment methodology, the Town of Chatham would have paid an additional \$572,537 in FY21, if the town were paying for its own elementary school – and this would find the Town of Harwich paying \$572,537 less in assessed costs, if it paid for only its own elementary school.

Should either redistricting or formation of upper and lower elementary schools be approved by change to the Regional Agreement, it would artificially shift per pupil spending, pushing HES spending up and CES down, simply by creating empty classrooms at HES to fill ones at CES. Mathematically, we could calculate a solid estimate of costs that would have been attributable to the Town of Chatham for running its elementary school had elementary reconfiguration not happened.

Plotting the ratio of Chatham resident elementary students to the sum of Harwich and Chatham resident elementary students in Monomoy from FY18 to FY25 against the ratio of the CES budget to the combined elementary school budgets provides a “best fit” line, which can accurately estimate the CES budget had reconfiguration not happened. FY18 to FY25 are used because that is when we are seeing the greatest change in enrollment. This estimate of the CES budget would then be plugged into the Assessment calculation, as shown in Appendix 5, assessing both towns for the operational costs of their elementary schools while controlling for the fiscal effects of reconfiguration.

The equation predicting the Chatham Elementary Budget if reconfiguration happens:

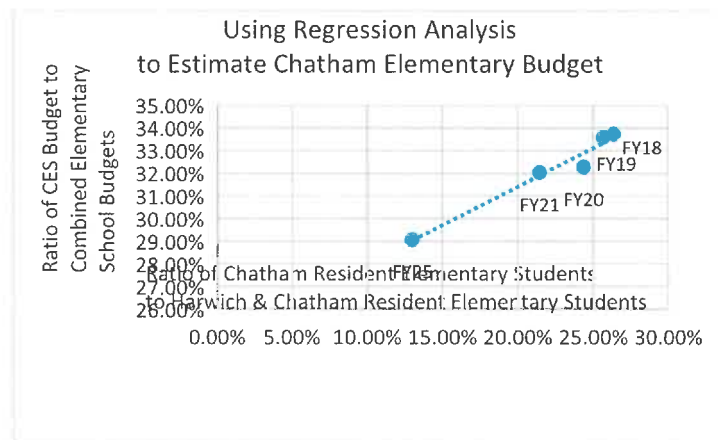
CES Estimated Budget without reconfiguration = (.3353 x (number of elementary-aged students from Chatham divided by the number of elementary-aged students from both Harwich and Chatham) + .2471) times the combined school budgets of both elementary schools

FY12 the equation would predict the CES budget to be $(.3353 \times (182/750) + .2471) \times \$7,498,847 = \$2,463,117$ compared to the actual CES FY12 budget of \$2,499,028, a \$36,911 difference

FY21 the equation would predict the CES budget to be $(.3353 \times (132/615) + .2471) \times \$8,954,608 = \$2,857,118$ compared to the actual CES FY21 budget of \$2,869,394, a \$12,276 difference

FY25 the equation would predict the CES budget to be $(.3353 \times (65/434) + .2471) \times \$9,114,882 = \$2,650,392$ compared to the projected CES FY25 budget of \$2,652,551, a \$2,159 difference

If for whatever reason in the future there is only one Monomoy elementary school, the district would stop using this methodology and simply attribute operational costs based on the Statutory Method.



Educational and Developmental Challenges of a Declining Elementary Enrollment

There is a good deal of research in the literature on the positive impacts of smaller class sizes on children's learning. These studies are largely done in more urban settings where elementary class sizes in the mid-20s are reduced to 15 to 18 students. For the past seven years, Monomoy has operated with this research in mind, striving to budget to keep our elementary class sizes 18 +/- 1 and our middle school and high school class sizes at 19 +/- 2 students. Our district is known for having very educationally supportive, small class sizes.

The unaddressed question is whether class sizes can become too small. In FY12, many Chatham Elementary School classrooms had 14 or fewer students, Chatham Middle School had as few as 11 students in a classroom, and there was an Advanced Placement class at Chatham High School with only three students. Most educators would agree that there is a point when classes become too small for vibrant discussions and too small for group dynamics to keep some individuals from dominating the class and disrupting learning. Classes that are too small also limit the pool of peers for individual students, preventing some from connecting with a like-minded friend, who may be a key social-emotional support for that child.

Demographic and housing trends in Chatham do not provide any indication that CES enrollment will begin to grow in the near future. Monomoy's Regional Agreement also provides the district no option to move more elementary-aged students to CES. The district uses intra- and inter-district school choice to bring in additional students to CES and to balance class sizes between the two elementary schools, but school choice alone will not allow CES to have two or three classrooms per grade. The only way to reverse the trends at CES would be to amend the Regional Agreement to permit some sort of reconfiguration: either redistricting Harwich students to CES or creating an upper and lower elementary school. It's important to note that any reconfiguration doesn't fill classrooms in both elementary schools, it just trades empty classrooms in CES for empty classrooms in HES.

Three years ago, Monomoy's Superintendent was increasingly hearing from Chatham teachers and parents concerned about the shrinking size of grade-level cohorts at CES and that CES class sizes were often smaller than those in Harwich. In a November 7 2017, blog post the Superintendent wrote:

What was a stable elementary population in Harwich and Chatham of 9 classes per grade level (3 at Chatham Elementary School and 6 in Harwich Elementary School) seems to be reaching a new stable state of 8 classes per grade level. No matter what, we will need both elementary schools to house all of our elementary-aged children. Based on the demographics of our towns, Chatham Elementary will likely gradually contract to have two classes per grade level, as it currently has at the kindergarten level. Harwich Elementary may be larger than optimal at six classes per grade, while Chatham Elementary may become smaller than optimal with only two classes per grade. Should Monomoy consider reconfiguring its elementary schools to more optimally support teaching, learning, and children's social development?

[The complete blog post can be found on the Monomoy website](#), and much has changed in just three short years.

To assess the appetite for amending the Regional Agreement, the Superintendent sent out a survey to then current and future elementary parents and elementary staff with options for reconfiguring Monomoy's elementary schools. Parents and staff were asked for their input on the options of maintaining the status quo in the Regional Agreement, allowing for an elementary redistricting option, or allowing for the formation of upper and lower elementary schools. The one-page fact sheet behind that survey is provided in Appendix 6, listing what was seen as the pros and cons of each option, given what we knew at the time.

The Superintendent provided a presentation of the survey results to the School Committee at its November 30, 2017, meeting. The slides of that presentation can be found in Appendix 7. There was not a clear consensus amongst the respondents, who were almost equally split between the three options (no reconfiguration, redistrict, or create upper and lower elementary schools). Staff, Harwich parents, and School Choice parents favored creating upper and lower elementary schools, with one elementary school in each town – no reconfiguration was the least common response for all three of these groups. By contrast, Chatham parents leaned towards no reconfiguration, with a near equal percentage expressing interest in redistricting. Given the lack of consensus, the conversation was tabled, knowing that at some point in the future the subject would need to be revisited, perhaps after CES families experienced first-hand increasingly fewer students in the school.

Today, much has changed. Three years ago, it appeared that CES was rapidly heading to having only two classes per grade level, but the number of elementary-aged children in the town has dropped at a much faster rate. Today, the Town of Chatham does not have enough kindergarteners to fill one classroom, without relying on intra- and inter-district school choice to round out the class. The FY22 cohort of kindergarten children will likely be even smaller. By FY25, it is anticipated that CES will only have one classroom at each grade, kindergarten through Grade 4 (see Appendix 2). In FY21, even before the challenges of running schools during a time of COVID, Chatham's integrated preschool program did not have enough children to merit full-time staff, so Chatham's preschoolers were sent to the PreK program at HES.

Change is also happening at HES, as that school's enrollment has slowly dropped from six classrooms per grade level to five (see Appendix 2). By FY25, it is anticipated that HES will have five classrooms at each grade, kindergarten through Grade 4.

It would be remiss to not clearly point out the obvious. HES long operated with six classrooms of students per grade level. Granted, it was a large elementary school, but it has long had a history of serving over 550 students. By FY25, the district will reach a point where HES will have a steady state of five classrooms per grade level, and CES will have a steady state of one classroom per grade level. All of these classrooms are projected to operate at or below a very supportive 18 students per classroom, and therefore all of Monomoy's elementary classrooms could fit under one roof at HES by FY25.

There is increasing urgency to this dilemma. Where once educators and many parents were concerned about CES only having two classes per grade level, all of these concerns have only magnified as the elementary school-aged population in Chatham dropped to just one classroom of kindergartners. While some may appreciate the intimacy that this creates, many others are concerned about the limitations and challenges of having these kindergarteners experiencing the same small grouping for five consecutive years (kindergarten through Grade 4), before experiencing larger social groups in middle school.

How to Remedy Having Too Few Students in Any Elementary School

There are options to remedy the situation of having too few students at Chatham Elementary School, but each will require amending the Regional Agreement. Amending the Regional Agreement requires the Selectmen in both towns and the School Committee to adopt new language on how the elementary schools should operate and these changes would need to be approved by Town Meetings in both communities.

The Superintendent strongly emphasizes that cost should not be the main factor in determining how to best educate the district's elementary students, and there will be budgetary implications to each of the options. One of the School Committee's 2020-2021 goals is to establish, organize, and lead a visioning session and/or community forum that includes a representative group of stakeholders from Chatham and Harwich to discuss an elementary developmental learning program. This conversation will focus on the pros and cons of continuing the status quo with our elementary schools with no reconfiguration. A parallel conversation will be happening with the towns' Selectmen on how to address the inequities in elementary per pupil expenditures if there is no reconfiguration. The conversation will also cover the pros and cons of reconfiguration in one of three different ways.

First is to "redistrict," where a subset of Harwich students are sent to CES. This would likely impact 50 to 85 children in neighborhoods close to the Chatham line, who would be redistricted to attend CES instead of HES. This would allow CES to maintain two classrooms per grade level. Redistricting would allow students and teachers at CES to have more peer interaction and support.

Second is to create a new elementary system with "upper" and "lower" elementary schools. Here, HES could potentially house all of Monomoy's preschool through Grade 2 students, and CES could then house all Grade 3 and 4 students (or vice versa). Each school would have six classrooms of students for each grade served by the building. This option offers greater connectedness, with all students of the same age attending elementary school together. It provides parents better opportunities to connect with peers with children of the same age. All educators will have multiple peers to collaborate with, all in the same building, allowing for much improved professional collaboration, sharing of best practices, and alignment and pacing of curriculum. The schools will be more efficient to staff, so class sizes within grade levels can be homogeneous (rather than balancing class sizes between CES and HES). There may be increased transportation costs with the creation of upper and lower schools, and this may impact school start times district-wide, if an additional tier of bussing is needed.

Third is to house all Monomoy elementary students "under one roof." This is more of a theoretical option at present, but by FY25, Monomoy would be able to fit all elementary students within HES with class sizes of 18 or fewer. This provides the most connectedness of all options, with all Monomoy's elementary students being educated together. It provides maximum opportunities for parents to connect with peers with elementary-aged children. It provides elementary educators maximum opportunities to professionally collaborate to best support teaching and learning. It provides for homogeneous class sizes within grade level and efficiency in staffing. It would create one large elementary school with slightly under 600 elementary students under one roof, and HES historically has operated with enrollment of this size. This option is the only one that provides both towns fiscal relief. A sample Assessment, in FY21 dollars, estimating the savings if all elementary students were consolidated at HES is provided in Appendix 8. Under this option, Harwich taxpayers could realize approximately \$1.5

million in savings and Chatham taxpayers could realize \$500,000 in savings, compared to the current elementary organization and Statutory Assessment dictated in the Regional Agreement.

Next Steps

The Superintendent will once again put out an Elementary Reconfiguration Survey to all current and future Monomoy elementary parents, as well as to our elementary staff. This survey will go out on December 8, 2020, and a report will be available for the School Committee by December 17, 2020. The proposed one-page fact sheet to inform that survey is on the following page. The survey results, along with all of the information in this document, will be used to inform the discussions the School Committee will be having with Selectmen and stakeholders.

Written for the Monomoy Regional School Committee by:

Dr. Scott Carpenter
Superintendent
Monomoy Regional School District
November 17, 2020

**Monomoy Regional School District
Potential Elementary School Reconfiguration Options**

Why consider reconfiguring Monomoy's elementary schools?

Enrollment at Chatham Elementary School has been in steady decline, with a much greater loss of enrollment than Harwich Elementary School. There are concerns that CES is becoming too small, lacking in adequate peers for both students and teachers. Given the loss of elementary enrollment, we must consider what is in the best educational interests of our towns' children. Some of the possible options below require amending the Regional Agreement.

OPTIONS	FACTS
1. No reconfiguration Continue to let CES get very small (meaning only one class per grade level at all grades). HES would operate with five classes at each grade level. <u>Does not require a change to the Regional Agreement</u>	• This is the only option available under the current regional agreement • Offers limited social connections for students at CES • Class sizes within grades and between buildings differ • Provides CES educators with no grade-level collaboration in the building
2. "Redistrict" some Harwich students to CES Divert a number of elementary students currently slated to attend HES and have them attend CES, which would allow CES to offer two classes at each grade level. HES would have four classes per grade. <u>Requires a change to the Regional Agreement</u>	• The redistricting would likely impact 50-85 children in a few neighborhoods in Harwich, closest to the Chatham town line • Class sizes within grades and between buildings differ • This would allow students and teachers at CES to have more peer interaction, since the school could maintain two classes per grade level
3. Create a new elementary system with an "upper" and "lower" elementary school This could potentially see HES housing all preschool through Grade 2 students in our district, and CES could then house all Grade 3 and 4 (or vice versa). Each school would have six classrooms of students for each grade served by the building. <u>Requires a change to the Regional Agreement</u>	• Offers greater connectedness with all students of the same age attending elementary school together, allowing parents better opportunities to connect with peers • All educators of the same grade are physically in the same building, allowing for maximum professional collaboration, sharing of best practices, and alignment of curricula and pacing • Allows for efficient staffing, so class sizes within grade levels are more homogeneous. • This option may involve greater transportation costs
4. House all Monomoy elementary students "under one roof" While the decline in CES enrollment, as well as HES enrollment, by the 2024-2025 school year all elementary students could now be housed at HES, with all class sizes 18 or fewer <u>Requires a change to the Regional Agreement</u>	• Offers greater connectedness with all students attending elementary school together, allowing parents better opportunities to connect with peers • All elementary educators are in the same building, allowing for enhanced professional collaboration, sharing of best practices, and alignment of curricula and pacing • Allows for efficient staffing, so class sizes within grade levels are more homogeneous

Appendix 1: Monomoy Elementary Enrollment FY12-FY21 and beyond

Chatham Elementary School				
Fiscal Year	Chatham resident Students	Harwich resident Students	School Choice from other towns	Total Enrollment
FY12	176	53	36	265
FY13	194	44	21	259
FY14	191	44	25	260
FY15	186	39	52	277
FY16	188	42	40	270
FY17	194	41	38	272
FY18	177	32	33	242
FY19	173	25	31	229
FY20	157	23	24	204
FY21	125*	24	21	170
FY25** *	53	24	21	100

*includes 13 Chatham resident students currently homeschooled because of COVID

Harwich Elementary School				
Fiscal Year	Chatham resident Students	Harwich resident Students	School Choice from other towns	Total Enrollment
FY12	6	515	68	589
FY13	6	522	58	586
FY14	4	526	68	598
FY15	5	524	71	600
FY16	9	525	63	597
FY17	7	516	43	566
FY18	12	496	42	550
FY19	7	496	53	556
FY20	7	486	59	552
FY21	10	459**	46	512
FY25** *	10	410	50	470

**includes 36 Harwich resident students currently homeschooled because of COVID

Monomoy Elementary-Aged Students				
Fiscal Year	Chatham resident Students	Harwich resident Students	Total Resident Students	% Residents from Chatham
FY12	182	568	750	24.3%
FY13	200	566	766	26.1%
FY14	195	570	765	25.5%
FY15	191	563	754	25.3%
FY16	197	567	764	25.8%
FY17	201	557	758	26.5%
FY18	189	528	717	26.4%
FY19	180	521	701	25.7%
FY20	164	509	673	24.4%
FY21	132	483	615	21.5%
FY25** *	65	434	499	13.0%

***projection based on FY21 kindergarten enrollments

Appendix 2: Number of Classrooms per Grade at Monomoy's Elementary Schools (FY12, FY20, FY25)

Grade	FY12		FY21*		FY25**	
	CES	HES	CES	HES	CES	HES
K	3	6	1	5	1	5
1	3	6	2	5	1	5
2	3	6	2	5	1	5
3	3	6	2	6	1	5
4	3	5***	3	6	1	5

*Pre-COVID projection based on enrollment and new kindergarten enrollments

**Projection based on current kindergarten enrollments

***Historically, as the district came together, HES often had 5 large classes of 4th grade, but the enrollment in these classes would have supported 6 classrooms of students.

Appendix 3: Monomoy Elementary Budgets FY12-FY21 and beyond

Fiscal Year	CES Budget	HES Budget	Combined Elementary Budgets
FY12	\$2,499,028	\$4,999,819	\$7,498,847
FY13	\$2,321,712	\$4,512,727	\$6,834,439
FY14	\$2,470,218	\$4,592,557	\$7,062,775
FY15	\$2,653,323	\$4,672,135	\$7,325,458
FY16	\$2,667,863	\$4,870,444	\$7,538,307
FY17	\$2,788,339	\$5,165,891	\$7,954,230
FY18	\$2,828,225	\$5,558,808	\$8,387,033
FY19	\$2,953,802	\$5,843,037	\$8,796,839
FY20	\$2,877,296	\$6,035,185	\$8,912,481
FY21	\$2,869,394	\$6,085,214	\$8,954,608
FY25*	\$2,652,551	\$6,462,331	\$9,114,882

*FY25 Elementary budgets estimated by deducting anticipated staff reductions and increasing budget by 2%/year

Appendix 4: Monomoy Elementary Per Pupil Spending FY12-FY21 and beyond

	Per Pupil Spending				
	town's elementary budget/town's elementary school enrollment				
Fiscal Year	CES per pupil spending	HES per pupil spending	Difference	Chatham Elementary Enrollment	Difference x Chatham Elementary Enrollment
FY12	\$9,430	\$8,489	\$942	265	\$249,630
FY13	\$8,964	\$7,701	\$1,263	259	\$327,117
FY14	\$9,501	\$7,680	\$1,821	260	\$473,460
FY15	\$9,579	\$7,787	\$1,792	277	\$496,384
FY16	\$9,881	\$8,158	\$1,723	270	\$465,210
FY17	\$10,214	\$9,127	\$1,087	273	\$296,751
FY18	\$11,687	\$10,107	\$1,580	242	\$382,362
FY19	\$12,899	\$10,509	\$2,390	229	\$547,310
FY20	\$14,104	\$10,933	\$3,171	204	\$646,884
FY21	\$18,276	\$12,784	\$5,492	157	\$862,244
FY25	\$26,526	\$13,750	\$12,776	100	\$1,277,600

Appendix 5: What the FY21 Assessment Would Have Been Had the Towns Paid for Their Own Elementary School
(compared to the actual assessment using the Statutory Method at the bottom of the page)

Town Funding of Their Elementary School Assessment FY21

Pro: Harwich has a more equitable assessment. Easily explained and calculated approach. Easily maintains the status quo agreement.

Con: This approach not work if redistricting or elementary reconfiguration happened, each of which places more HES students in CES (emptying classrooms at HES and driving HES per pupil costs up). A different approach would be needed to estimate a CES budget.

Elementary School Budgets	Total Cost	No. Stds	Per Pupil	
Chatham Elementary School FY21 Budget	\$ 2,869,394	170	\$ 16,879	
Harwich Elementary School FY21 Budget	\$ 6,085,214	512	\$ 11,885	Per Pupil Difference 4,994
Final FY21 Monomoy Budget			\$ 41,261,134	
Revenue				
Ch 70	\$ 3,798,314			
E&D	\$ 850,440			
Charter School	\$ 75,717			
Medicaid	\$ 155,000			
Interest	\$ 7,500			
Misc Revenue	\$ 13,562			
Total			\$ 4,900,533	
Non-Operating Expenditures				
Transportation	\$ 1,484,699			
Capital/Stabilization	\$ 355,000			
Debt	\$ 2,110,916			
Total			\$ 3,950,615	
Total Operating Assessment			\$ 32,409,986	
Operating Assessment				
	Harwich	Chatham	Total	
Required Minimum Contribution	\$ 13,156,660	\$ 4,190,569	\$ 17,347,229	
Cost to Run Elementary Schools	\$ 6,085,214	\$ 2,869,394	\$ 8,954,608	
Total Operating Assessment (Required Minimum Plus Elementary Costs)	\$ 19,241,874	\$ 7,059,963	\$ 26,301,837	
Funding Beyond Minimum Contribution Needed to Support Budget			\$ 6,108,149	
Split Based on 3-Year Rolling Foundation Enrollment				
	Harwich	Chatham		
Additional Operational Funding Per Member	\$ 4,541,409	\$ 1,566,740		
Operating Assessment Per Member	\$ 23,783,283	\$ 8,626,703		
Transportation Assessment			\$ 1,484,699	
less Regional Transportation Aid			\$ 641,360	
			\$ 843,339	
Split Based on 3-Year Rolling Enrollment from Towns				
	Harwich	Chatham		
Transportation Assessment Per Member	\$ 630,818	\$ 212,521		
Capital/Stabilization Assessment				
Split Based on 3-Year Rolling Foundation Enrollment				
	Harwich	Chatham		
Capital/Stabilization Assessment Per Member	\$ 263,943	\$ 91,058	\$ 355,000	
Debt Assessment				
Split Based on 3-Year Rolling Foundation Enrollment				
	Harwich	Chatham		
MRHS Bond (principal and interest)	\$ 1,475,197	\$ 508,928	\$ 1,984,125	
Final MRHS Financing	\$ 94,260	\$ 32,522	\$ 126,791	
Debt Assessment Per Member	\$ 1,569,466	\$ 541,450	\$ 2,110,916	
Total FY21 Assessment				
	Harwich	Chatham		
Operating Assessment	\$ 23,783,283	\$ 8,626,703	\$ 32,409,986	
Transportation Assessment	\$ 630,818	\$ 212,521	\$ 843,339	
Capital/Stabilization Assessment	\$ 263,943	\$ 91,058	\$ 355,000	
Total Before Debt	\$ 24,678,043	\$ 8,930,282	\$ 33,608,325	
Debt Assessment	\$ 1,569,466	\$ 541,450	\$ 2,110,916	
Total FY21 Assessment	\$ 26,247,509	\$ 9,471,732	\$ 35,719,241	
Total FY21 Statutory Assessment	\$ 26,820,044	\$ 8,899,195	\$ 35,719,241	
Difference between methods	\$ (572,537)	\$ 572,537	\$ -	

Appendix 6: One-page Fact Sheet Guiding the November 2017 Survey on Possible Elementary Reconfiguration

Monomoy Regional School District Possible Elementary School Reconfiguration

Mission Statement

Monomoy Regional School District is a community of learners of all ages focused on building knowledge, positive character, and resiliency in a safe, supportive, creative, and challenging environment.

Why consider reconfiguring Monomoy's elementary schools?

Given that Chatham Elementary School (CES) enrollment is in decline, relative to the enrollment at Harwich Elementary School (HES), a concern is that Chatham Elementary may become too small, lacking adequate peers for both students and teachers, while Harwich Elementary would be operating at a capacity beyond which is ideal. By statute, a regional school district must periodically review its regional agreement and when doing so needs to consider what is in the best educational interests of our towns' children. Two of the options below require amending the regional agreement.

OPTIONS	FACTS
#1 No reconfiguration: Let Chatham Elementary School get small (shrinking from three classes per grade level to two) and Harwich Elementary School to operate with six classes per grade level. <i>DOES NOT REQUIRE A CHANGE TO THE REGIONAL AGREEMENT</i>	- This is the only option available under the current regional agreement. - Limited social connections for children if CES shrinks to only two classes per grade level. - Provides our educators at CES only one other grade-level colleague with whom to regularly collaborate and share best practices. - HES will be pressed for space and one grade level will likely be compressed into five larger sized classes (as the building has run in recent history). - Having five to six classes per grade level provides ample peers for both students and teachers, but it also finds HES operating as a very large, not so intimate, school. - With one third of CES likely vacant in future years, the district could consider using this space to expand preschool options.
#2 "Redistrict": Divert one of elementary-aged students currently attending Harwich Elementary School and have them attend Chatham Elementary School, which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with five classes per grade level. <i>REQUIRES A CHANGE TO THE REGIONAL AGREEMENT</i>	- This redistricting would impact only a few neighborhoods in Harwich, closest to the Chatham town line. - A bus load of HES children, roughly 15 per grade level, would find CES to be their new elementary school. - This would allow CES students and teachers to have more peer interaction, since the school could maintain three classes per grade level. - This would also allow HES to get slightly smaller, shrinking from six to five classes per grade level, which would allow the building to be more intimate for the families we serve. - This would find HES with up to four classrooms available to consider future expansion of preschool options.
#3 Create a new elementary system with an "upper" and a "lower" elementary school: This could see the Harwich Elementary School building housing all Pre-K through Grade 2 students in our district. Chatham Elementary School would then house all Grade 3 and Grade 4 students, with each elementary grade level having eight sections per grade level. <i>REQUIRES A CHANGE TO THE REGIONAL AGREEMENT</i>	- This approach maximizes peer connections for both students and teachers. - All students of the same age attend the same elementary school together, which allows both students and parents better opportunities to connect with peers with like interests. - All educators teaching the same grade are housed in the same building, allowing for maximum professional collaboration, sharing of best practices, and alignment of curricula and pacing. - Allows for more efficient staffing, so class sizes within grade levels are more homogeneous, while also kept small (averaging 18 or fewer students per class). - This would find the HES with the capacity to expand preschool options for Monomoy families, using a few available classrooms, with HES functioning as an early childhood hub. - This option may involve greater transportation costs.

For more information, please go to <https://www.monomoy.edu/Page/113>.

Appendix 7: Monomoy Reconfiguration Survey Presentation to the Monomoy Regional School

Committee from November 27, 2017

Monomoy Elementary Reconfiguration Survey Preliminary Results

Survey closed 11/27/17 at 10 AM

453 responses

Note:

The survey soliciting parents, community members, and staff input is now closed. It was open from November 7 until November 27.

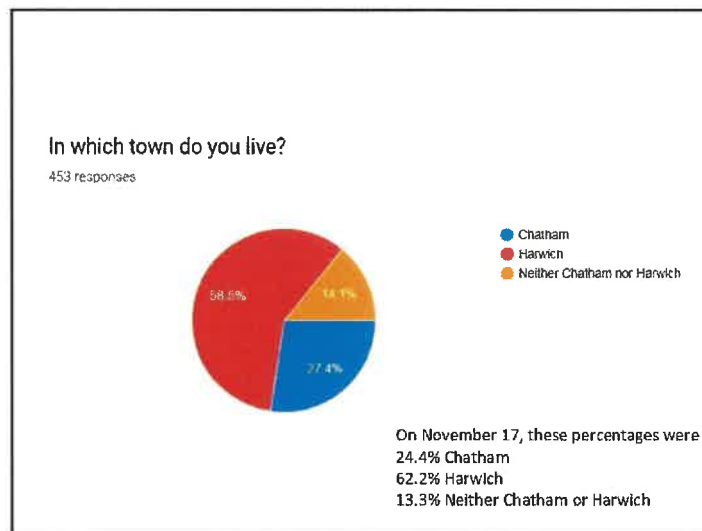
<https://docs.google.com/forms/d/e/1FAIpQLScagLrXpF1R2urdaIFj63iQYZ0hVpkqVpvunrVwZssffBX1tw/viewform>

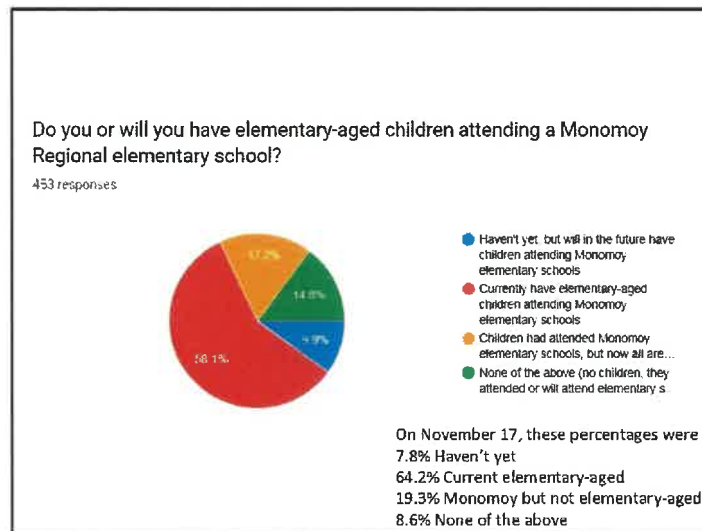
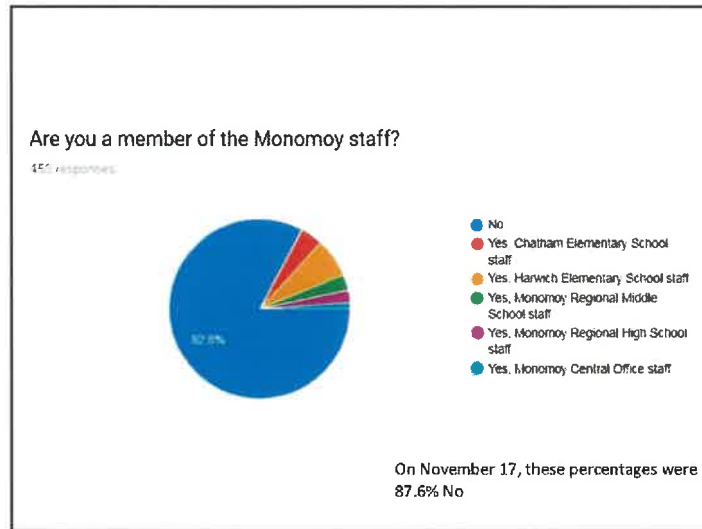
453 people responded to the survey.

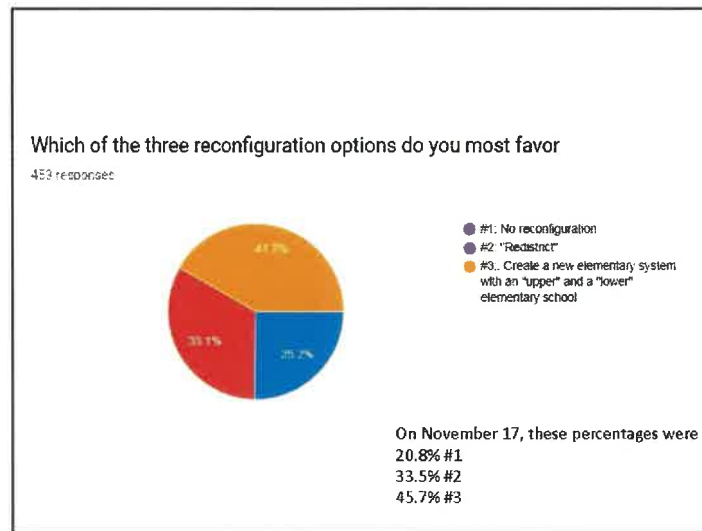
Requests to participate in the survey were sent thrice to all parents and staff, and it has been sent out to Monomoy parents "to be" through the local Early Childhood Council.

A one-page document has been created to summarize the three options under consideration. The content of this one-page summary was included in the text of the survey, to help educate and inform those taking it.

Monomoy Regional School District Proposed Elementary School Reconfiguration	
Why consider reconfiguring Monomoy's elementary schools? Given that Chatham Elementary School (CES) enrollment is in decline, relative to the enrollment at Harwich Elementary School (HES), a concern is that Chatham Elementary may become a "one school town" lacking adequate space for both students and teachers, while Harwich Elementary would be operating at a capacity beyond which is ideal. In addition, a separate school district must periodically reassess its regional agreement, and when doing so needs to consider what is in the best educational interests of our towns' children. Two of the options before require amending the regional agreement.	
Option 1: CES and HES configuration Let Chatham Elementary School get small elementary from these classes per grade level (based on current CES enrollment) to operate until no classes per grade level. QUESTIONS TO CONSIDER: 1) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level? QUESTIONS TO CONSIDER: 2) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level? QUESTIONS TO CONSIDER: 3) Create a new elementary system within an "upper" and a "lower" elementary school. This would use the Harwich Elementary School building. Having all the 1 through 5th students in one district, Chatham Elementary School would then house all 6th through 8th students, with each elementary grade level having eight teachers per grade level. QUESTIONS TO CONSIDER: 4) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level?	QUESTIONS TO CONSIDER: 1) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level? QUESTIONS TO CONSIDER: 2) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level? QUESTIONS TO CONSIDER: 3) Create a new elementary system within an "upper" and a "lower" elementary school. This would use the Harwich Elementary School building. Having all the 1 through 5th students in one district, Chatham Elementary School would then house all 6th through 8th students, with each elementary grade level having eight teachers per grade level. QUESTIONS TO CONSIDER: 4) "Headcount": Work line of elementary aged students currently attending Harwich Elementary School and how many attend Chatham Elementary School. Which will allow Chatham Elementary to continue to operate with three classes per grade level and Harwich Elementary to operate with two classes per grade level?







Staff Responses

Staff	#1	#2	#3
	8	16	54
			78

CES

#1 11%

#2 28%

#3 61

HES

#1 15%

#2 25%

#3 60%

90% Indicate favoring some kind of change (#2 or #3)

Chatham Responses

Chatham	#1	49	42%	←
	#2	45	39%	
	#3	<u>22</u>	19%	
		116		

58% indicate favoring some kind of change (#2 or #3)

Harwich Responses

Harwich	#1	54	24%	
	#2	78	35%	
	#3	<u>94</u>	42%	←
		226		

77% indicate favoring some kind of change (#2 or #3)

Choice Responses

Choice	#1	3	9%
	#2	11	33%
	#3	<u>19</u>	58%
		33	



91% indicate favoring some kind of change (#2 or #3)

Appendix 8: What the FY25 Assessment Theoretically Could Be (in FY21 dollars) If All Monomoy's Elementary Students Were Educated Under One Roof at HES (this presumes 6 sections per grade)

Elementary Consolidation Assessment FY21

Note: This is not realistically feasible until FY25, but is calculated as a point of reference. The enrollment below is an FY25 projection.

Pro: Both towns save money, because of economies of scale. Smallest possible per-pupil spending. All children in a grade-level are educated together.
Con: Creates one large elementary school, perhaps too large.

Elementary School Budgets	Total Cost	No. Stds	Per Pupil	
Chatham Elementary School FY21 Budget	\$ 2,869,394			
less carryover costs from CES required if consolidated with HES	\$ 842,318			
Harwich Elementary School FY21 Budget	\$ 6,085,214			
Revised HES Elementary Combined Budget	\$ 6,927,532	570	\$ 12,154	
				"Under One Roof" savings \$ (2,027,076)
Final FY21 Monomoy Budget			\$ 39,234,058	
Revenue				
Ch 70	\$ 3,798,314			
E&D	\$ 850,440			
Charter School	\$ 75,717			
Medicaid	\$ 155,000			
Interest	\$ 7,500			
Misc. Revenue	\$ 13,562			
Total			\$ 4,900,533	
Non-Operating Expenditures				
Transportation	\$ 1,484,699			
Capital/Stabilization	\$ 355,000			
Debt	\$ 2,110,916			
Total			\$ 3,950,615	
Total Operating Assessment			\$ 30,382,910	
Operating Assessment				
Required Minimum Contribution	Harwich \$ 13,156,660	Chatham \$ 4,190,569	Total \$ 17,347,229	
Funding Beyond Minimum Contribution Needed to Support Budget			\$ 13,035,681	
Split Based on 3-Year Rolling Foundation Enrollment	Harwich 74.35%	Chatham 25.65%		
Additional Operational Funding Per Member	\$ 9,692,029	\$ 3,343,652		
Operating Assessment Per Member	\$ 22,848,689	\$ 7,534,221		
Transportation Assessment			\$ 1,484,699	
less Regional Transportation Aid			\$ 641,360	
			\$ 843,339	
Split Based on 3-Year Rolling Enrollment from Towns	Harwich 74.80%	Chatham 25.20%		
Transportation Assessment Per Member	\$ 630,818	\$ 212,521		
Capital/Stabilization Assessment				
Split Based on 3-Year Rolling Foundation Enrollment	Harwich 74.35%	Chatham 25.65%		
Capital/Stabilization Assessment Per Member	\$ 263,943	\$ 91,058	\$ 355,000	
Debt Assessment				
Split Based on 3-Year Rolling Foundation Enrollment	Harwich 74.35%	Chatham 25.65%		
MRHS Bond (principal and interest)	\$ 1,475,197	\$ 508,928	\$ 1,984,125	
Final MRHS Financing	\$ 94,269	\$ 32,522	\$ 126,791	
Debt Assessment Per Member	\$ 1,569,466	\$ 541,450	\$ 2,110,916	
Total FY21 Assessment				
Operating Assessment	Harwich \$ 22,848,689	Chatham \$ 7,534,221	\$ 30,382,910	
Transportation Assessment	\$ 630,818	\$ 212,521	\$ 843,339	
Capital/Stabilization Assessment	\$ 263,943	\$ 91,058	\$ 355,000	
Total Before Debt	\$ 23,743,449	\$ 7,837,800	\$ 31,581,249	
Debt Assessment	\$ 1,569,466	\$ 541,450	\$ 2,110,916	
Total FY21 Assessment	\$ 25,312,915	\$ 8,379,250	\$ 33,692,165	
Total FY21 Statutory Assessment	\$ 26,820,246	\$ 8,899,195	\$ 35,719,441	
Difference between methods	\$ (1,507,331)	\$ (519,945)	\$ (2,027,076)	

Recommended Revisions to the Monomoy Regional Agreement

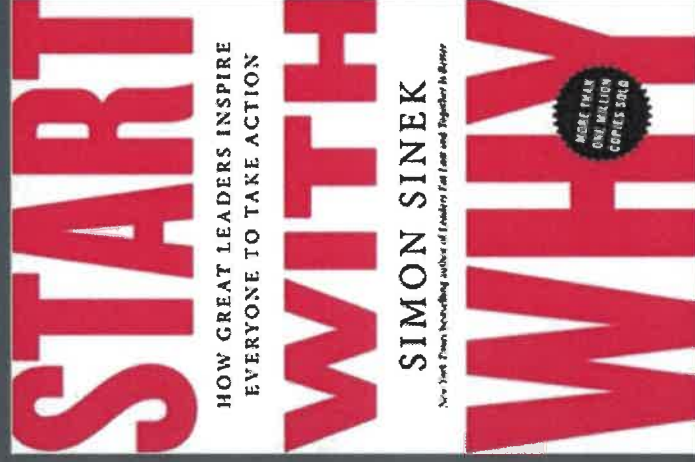
The Monomoy Regional School Committee voted to approve and move forward to the Select Boards in Chatham and Harwich this recommendation by unanimous vote of the full 8-person committee at its August 11, 2021, meeting.

**A presentation for
School Committee and
Select Boards
November 2021**



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The Why

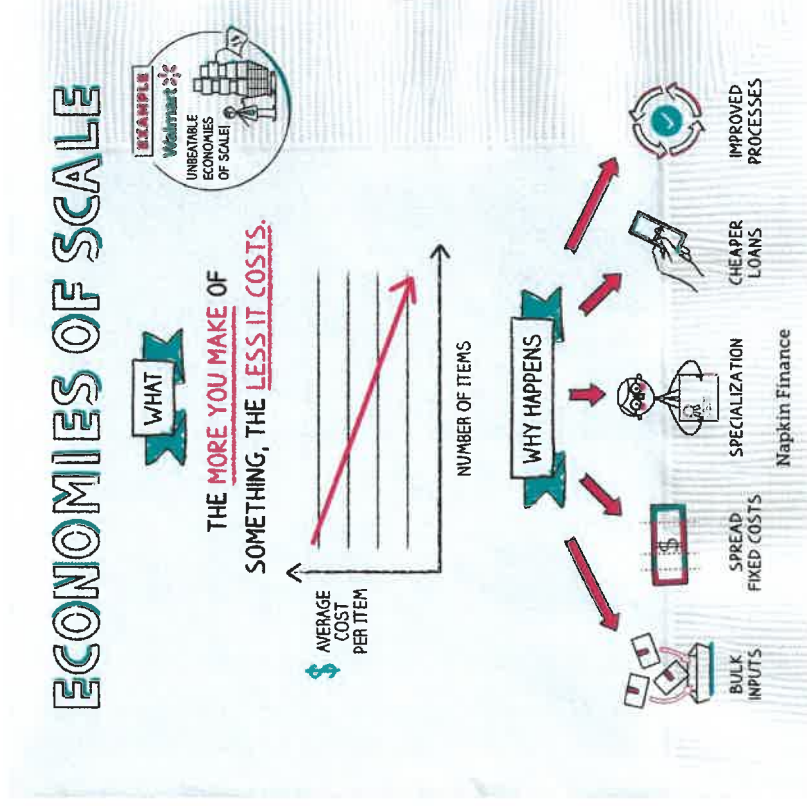


Two reasons:

First, there is a great deal of obsolete language in the existing Regional Agreement describing the process of bringing the regional district into existence. The recommended revisions remove obsolete language and, where needed, add wording to clarify the current practice or statute.

Second, the Superintendent has raised a concern of unintended fiscal inequity in how the language in the Regional Agreement handles assessment, where the Town of Harwich ends up subsidizing operational costs of a much smaller Chatham Elementary School. A new approach to assessing costs is recommended, which would find each town paying for its own elementary school; thereby mitigating the unintended elementary fiscal inequity.

Understanding the Fiscal Inequity: Basic Economics



Economies of scale apply to businesses in the private sector, and also apply to operating schools.

Generally, the more students we educate within a school, the less it will cost to educate each student, because building-level costs (such as administrative, nursing, counseling, and specialist salaries, as well as utility expenses) are divided among a larger student population in bigger schools.

Understanding the Fiscal Inequity: Real Numbers

FY22 Harwich Elementary School net budget
\$6,069,495

FY22 Harwich Elementary School enrollment
492 students

FY22 net cost per student at Harwich Elementary
\$12,336

FY22 Chatham Elementary net budget
\$2,794,157

FY22 Chatham Elementary School enrollment
145 students

FY22 net cost per student at Chatham Elementary
\$19,270

FY22 difference in cost per student:

It costs \$6,934 more to educate a student at Chatham Elementary (compared to Harwich Elementary), simply because of economies of scale.

Under the existing Regional Agreement, Harwich taxpayers fund the majority (75.11%) of this difference in cost per student.

Understanding the Fiscal Inequity: Current Assessment

FY22 Harwich Elementary School net budget
\$6,069,495

+

FY22 Chatham Elementary net budget
\$2,794,157

FY22 combined Elementary School net budgets
\$8,863,652

Per the existing Regional Agreement, these costs are assessed based on the 3-year rolling average of foundation enrollment.

FY22 3-year Harwich foundation enrollment
75.11%

FY22 Harwich's current assessed share of
Elementary School net budgets
\$6,657,489

It would cost Harwich taxpayers less to pay
for their town's elementary school net budget.

FY22 3-year Chatham foundation enrollment
24.89%

FY22 Chatham's current assessed share of
Elementary School net budgets
\$2,206,163

It would cost Chatham taxpayers more to pay
for their town's elementary school net budget.

A simple and more equitable approach would be to have each town pay for the cost of its own elementary school.

This would annually shift about \$600,000 in assessment costs from Harwich to Chatham, making the assessment more fiscally equitable.

Why addressing the fiscal inequity is important:

The School Committee and Superintendent have and will continue to provide the same strong elementary programming at both Chatham Elementary School and Harwich Elementary School.

Equalizing the net cost per elementary student by simply cutting Chatham Elementary's operating budget from the current (FY22) \$19,270 per student to only \$12,336 means that the school's budget wouldn't be able to sustain the same level of staffing. Such a cut would cause a drastic increase in class size and decrease specials and supports for students. Equalizing costs would be inequitable to the students, and is viewed as unacceptable to the Superintendent and School Committee.

Making operations of the elementary schools more fiscally equitable benefits Harwich, its families, and its taxpayers:

The proposal shifts costs from Harwich to Chatham, providing fiscal relief to Harwich because Chatham would be fully funding the actual costs of running a smaller elementary school.

Making operations of the elementary schools more fiscally equitable benefits Chatham and its families:

The proposal ensures that strong educational programming remains at Chatham Elementary and, by providing fiscal relief to Harwich, better supports passage of sound school budgets by the town that will allow the district to maintain programs and quality across all grades K-12.

Recommended Revisions to the Assessment

There are three areas within the current Regional Agreement that would be changed under this recommendation:

- 1) How School Choice revenue is handled
- 2) How the Operating Assessment is calculated
- 3) How capital costs are assessed to each town

Recommended Revisions to the Assessment

Adding a Process for Allocating School Choice Revenue

(Section VII. Budget adds a provision 7 regarding allocation of School Choice revenue)

Currently, there is no provision in the Regional Agreement for how School Choice revenue is applied toward the budget.

In practice, since regionalization, School Choice revenue offsets a portion of the staffing costs and lies outside of the budget. Since both towns are assessed simply based on a proportion determined by the 3-year rolling average of foundation enrollment, there hasn't been a need to ensure each town get its share of School Choice revenue.

Under the recommended revision to the assessment, the budget will be prepared net of School Choice revenue.

School Choice revenue will then be proportionally allocated to offset each school's budget based on the school's average ratio of enrollment at that school for the preceding three years (determined by October 1 reporting to DESE). This ratio is the ratio that the school's enrollment is of the total district enrollment.

School Choice revenue IS NOT based on school choice into that building, because in order to balance class sizes, administrative decisions are often driving school choice enrollment towards one or the other elementary school.

Recommended Revisions to the Assessment

The recommended adjustments to the assessment methodology in the Regional Agreement change how the Operating Assessment is calculated by attributing the costs to run each elementary school to the town that owns that elementary school (see Section IX. Method of Assessing Costs of the District).

Current Assessment Methodology per the existing Regional Agreement:

FY22 Harwich Operating Assessment: \$25,043,128
FY22 Chatham Operating Assessment: \$7,765,396

Alternative Assessment if the Recommended Revisions to the Regional Agreement were adopted by Town Meetings:

FY22* Harwich Operating Assessment: \$24,431,627
FY22* Chatham Operating Assessment: \$8,376,896

*note: these are provided as an example only. The FY22 assessment has already been determined by Town Meeting vote under the current assessment methodology.

[Click here to see how the Operating Assessment is calculated under the existing Regional Agreement](#)

[Click here to see how the Operating Assessment would be calculated under the recommended revision to the Regional Agreement](#)

Recommended Revisions to the Assessment

Adjusting the Method of Assessing Capital Costs

(Section IX. B. of the redlined Regional Agreement recommendations)

The original Regional Agreement split all capital costs by the 3-year rolling average of foundation enrollment.

The recommended revisions would assess only capital costs at the middle school and high school by the 3-year rolling average of foundation enrollment. Any capital costs for the elementary school would be assessed only to the town that owns the building.

Upcoming Capital Projects:

The district has had in its Capital Plan a need to replace the roof of Chatham Elementary School in the near future. The ballpark cost estimate of this roof replacement is about \$1.5M.

The district has also had in its Capital Plan a need to replace the roof of Monomoy Regional Middle School in the near future. The ballpark cost estimate for this roof replacement is also about \$1.5M. The middle school is also in need of siding and trim replacement. Roofing costs may be offset by MSBA, siding and trim are not.

Recommended Revisions to the Assessment

Chatham Elementary Roof Example

Under the existing Regional Agreement, the approximate \$1.5M cost of the Chatham Elementary School roof would be split based on the 3-year rolling average of foundation enrollment:

Chatham would bear 24.89% (FY22) of the costs.
Harwich would bear 75.11% (FY22) of the cost.

Under the Recommended Revisions:

Chatham would bear 100% of the costs. And Harwich would be solely responsible for its elementary school roof in the future.

Monomoy Regional Middle School Roof Example

Under the existing Regional Agreement, the approximate \$1.5M cost of the Monomoy Regional Middle School roof would be split based on the 3-year rolling average of foundation enrollment:

Chatham would bear 24.89% (FY22) of the costs.
Harwich would bear 75.11% (FY22) of the cost.

The Recommended Revisions DO NOT alter assessment of capital costs at the regional middle school or regional high school.

Chatham would bear 24.89% (FY22) and Harwich 75.11% (FY22) of the cost for both the roof and any siding and trim at the middle school, and any future high school capital projects.

Harwich Elementary Capital Projects

^ Net of estimated MSBA reimbursement

Project	Estimated Cost	Project start year	Assessment Cost Center
HES Boiler Replacement	\$6,350,400 ^	FY28 / FY29	Harwich ES
HES Smoke Alarms	\$40,000	FY26	Harwich ES
CES & HES Wireless Access Points	\$80,000	FY27	Chatham ES / Harwich ES
HES Roof Top HVAC Unit	\$65,000	FY27	Harwich ES
HES Roof Top HVAC Unit	\$65,000	FY28	Harwich ES

Chatham Elementary Capital Projects

^ Net of estimated MSBA reimbursement

Project	Estimated Cost	Project start year	Assessment Cost Center
CES Restoration: Siding, roof, and windows.	TBD	FY29 / FY30	Chatham ES
CES Boiler Replacement	\$2,872,390 ^	FY32	Chatham ES
CES Classroom Flooring Replacement	\$40,000	FY26	Chatham ES
CES & HES Wireless Access Points	\$80,000	FY27	Chatham ES / Harwich ES
CES Generator	\$350,000	FY30	Chatham ES
Classroom Furniture	TBD		

Middle School Capital Projects

^ Net of estimated MSBA reimbursement

Project	Estimated Cost	Project start year	Assessment Cost Center
MRMS Restoration – Phase 1: Windows and siding	\$11,507,030	FY25 / FY26	District
MRMS Restoration – Phase 2: Roof	\$5,355,000 ^	FY27	District
MRMS Boiler Replacement	\$5,320,444 ^	FY31	District
MRMS Classroom Flooring Replacement	\$60,000	FY26	District
MRMS Classroom Flooring Replacement	\$80,000	FY27	District
MRMS Generator	\$350,000	FY29	District
Classroom Furniture	TBD		

High School Capital Projects

Project	Estimated Cost	Project start year	Assessment Cost Center
Press Box – Accessibility	\$200,000	TBD	District
MRHS Field and Track	\$1,500,000	FY30	District

Other/District Capital Projects

^ Net of estimated MSBA reimbursement

Project	Estimated Cost	Project start year	Assessment Cost Center
District Facilities Truck	\$70,000	FY26	District
Network Switches	\$72,000	FY27-FY31	District
Classroom Furniture	\$200,000	FY28	District / Chatham ES
Classroom Furniture	\$150,000	FY29	District / Chatham ES

Summary of Age of Major Building Components

Item	Expected Useful Life	CES	HES	MRMS	MRHS
Boilers	20 years	28	1 is 22 y.o. 2 are 34 y.o.	28	12
Generators	20 years	29	22	29	12
Roof	20 years	29	22	28	12
Windows	20 years	29	22	28	12
Doors	20 years	29	22	28	12
Elevator	20 years	N/A	22	28	12
Hot water tank	15 years	4	22	7	12
Pumps	20 years	28	22	9, 14 and 7 y.o.	12
Auditorium	10 years	N/A	N/A	N/A	12
Turf Field	15-20 years	N/A	N/A	N/A	12
Track	15-20 years	N/A	N/A	N/A	12