



HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT

6:30 – 7:00 PM PUBLIC HEARING: SCHOOL CHOICE 2014-2015

7:00 PM

REGULAR SCHOOL COMMITTEE MEETING

8:45 PM

PUBLIC HEARING: FY15 BUDGET

MEETING NOTICE – AMENDED 1.22.14 @ 8:30 AM

Name: School Committee Meeting
Date: Thursday, January 23, 2014
Time: 7:00 PM
Location: Buker Multi-Purpose Room
Signature: Deborah Evans, Hamilton-Wenham Regional School District Secretary

AGENDA

1. Call to Order **7:00**
2. Pledge of Allegiance
3. Citizens' Concerns **7:05**
4. **Consent Agenda 7:30**
 - a. Minutes of January 16, 2014 meeting **Exhibit A**
 - b. Accepting donation from EdFund for Chromebooks & Mobile Cart **Exhibit B**
5. **Chair's Report 7:45**
 - a. Update on changing number of School Committee members
 - b. Adding a goal relative to student performance
6. **Committee Reports 8:00**
 - a. Audit
 - b. Facilities
 - c. Negotiations
 - d. Policy
 - e. Warrant
 - f. Student Rep.
 - g. Other

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HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT

7. **New Business** **8:45**
 - a. School Choice
 - i. Master Plan progress report (School Choice) Exhibit C
 - ii. School Choice Participation Motion
 - b. **FY15 Budget Public Hearing**
 - c. Discussion of Level Service & \$600K budget proposal including use of E&D
 - d. Discussion on FY14 Surplus
8. **Old Business**
 - a. **2nd Reading of Policies**
 - i. Education of Pregnant and or Parenting Students Exhibit D
9. **Vote to Adjourn to Executive session to update full School Committee on negotiations with teachers bargaining unit and not to return to open session** **9:30**

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Hamilton-Wenham Regional School District Committee

Jan. 16, 2014

Minutes

**CALL TO ORDER AND
PLEDGE OF ALLEGIANCE:**

Roger Kuebel opened the meeting at 7:07 p.m. in the Buker Multipurpose Room. The Committee and others present rose for the Pledge of Allegiance.

PRESENT:

Bill Dery, Deb Evans, Roger Kuebel (chair) (until 9:37), Barbara Lawrence, Sheila MacDonald, Larry Swartz, Bill Wilson (vice chair)

ALSO PRESENT:

Dr. Michael Harvey, Superintendent; Dr. Celeste Bowler, Assistant Superintendent for Instruction; Jeff Sands, Assistant Superintendent for Administration and Finance; Vincent Leone, Accountant

ABSENT:

Jeanise Bertrand, Sean Condon

CITIZENS' CONCERNS:

None

CHAIR'S REPORT:

R. Kuebel reported on a Jan. 8 meeting with the Wenham town administrator, Hamilton town manager and chairs of both Towns' finance committees and boards of selectmen about how the Committee deals with excess funds, and whether to create a policy to guide future school committees' decisions in this area. B. Wilson said he would again seek the input of the district's auditors.

CONSENT AGENDA:
Minutes of January 9, 2014

BILL WILSON MADE A MOTION THAT THE H-W REGIONAL SCHOOL COMMITTEE APPROVE ALL OF THE REMAINING ITEMS ON THE CONSENT AGENDA. THERE CAN BE NO FURTHER DISCUSSION OR AMENDMENT OF THIS MOTION. SHEILA MACDONALD SECONDED THE MOTION. THE MOTION PASSED 7-0-0-2.

SUPERINTENDENT'S REPORT:

Dr. Harvey noted changes from the earlier tentative agendas and dates for some topical discussions and public hearings. The public hearing on the school choice program is scheduled for 6:30 p.m. on Jan. 23. The budget hearing is to take place during the meeting that begins at 7 p.m. on that date. The Committee is to vote at the Jan. 23 meeting, following the public hearing, on whether to participate in the choice program for the 2014-15 school year by admitting new students through the choice program; until that vote, applications cannot be accepted. The vote will have no impact on students already enrolled in HWRSD through this program.

COMMITTEE REPORTS:

Audit	None
Facilities	None
Negotiations	This subcommittee was scheduled to meet the morning following this meeting.
Policy	This subcommittee addressed policy issues later in this meeting.
Warrant	None
Master plan	Dr. Harvey said this group had a productive meeting the day prior to this meeting.
Student Rep	None
Building	None
Other	Dr. Harvey said the district and the two Towns continue to cooperate in planning for a potential shared Department of Public Works and are currently exploring standardizing accounting systems and work order systems.
NEW BUSINESS: First Reading of Policies	B. Lawrence detailed proposed revisions of a group of existing district policies, and proposed new policies. The Committee discussed some of the proposals briefly; others were introduced with no further comment. The Committee is to vote on the policy revisions and proposals after a second reading at a future meeting.
<i>Education of Pregnant and/or Parenting Students</i>	A proposed additional sentence would stipulate that after giving birth, students are permitted to return to the same academic and extracurricular programs in which they participated before they took the leave.
<i>Developing Educational Specifications</i>	R. Kuebel commented that the draft policy omits mention of many other things to take into consideration when developing educational specs.
<i>Facilities Planning</i>	Members reached informal agreement that this policy describing the role of the Facilities Working Group (FWG) need not mention the Open Meeting Law. They discussed the superintendent's and FWG's roles in decisions about hiring consultants and considered whether to rephrase #4 within the draft text.
<i>Consultants</i>	R. Kuebel suggested this policy should address CORI checks.
<i>Naming Facilities</i>	Discussion touched on whether the draft text would obligate the district to following the wishes of the community in naming facilities. At L.

Swartz's suggestion they rephrased the last sentence of the draft to read "Such procedures will include the solicitation of community input."

Building & Grounds Management

R. Kuebel and B. Dery said this policy is unnecessary because it would simply state the district would comply with the law on certain points.

Safety Program

Dr. Harvey said the draft text is consistent with the law.

Staff Accident Reports

A typo in line 6 of the draft was corrected, to change "aid" to "said."
Dr. Harvey said the district already has a staff accident report form as stipulated in this draft policy.

FY15 Budget Discussion

Peer analysis

Historical trends

Review of per pupil expenditures

R. Kuebel provided and discussed statistical graphics that he prepared to provide contextual data about how much various districts spend per student. They were displayed onscreen (and are appended to these minutes). His presentation and discussion that followed touched on topics including how some peer districts' per student spending compares to HWRSD's; how HWRSD's compares to certain percentile ranges of Massachusetts districts; trends in recent years; where this district should be situated in this regard; foreign language instruction; activity fees; budgeting proactively for anticipated maintenance needs and routine replacement; variables that can affect a district's per student expense; class sizes; a proposed new curriculum position; special education costs, and partial reimbursement by the state. Members commented on topics including past reductions in staff and programs, and their opinions about restoring some; using volunteers; and outside fundraising.

Targets for FY15 budget

Dr. Harvey displayed and discussed budget scenarios that project how various hypothetical FY15 budgets would ripple into future fiscal years in total dollars, percent change, and changes in the Towns' assessments. (The budget scenarios he presented are appended to these minutes.) He discussed details including contractual increases in staff compensation; recurring expenses; and various options for the Excess and Deficiency (E&D) account. The scenarios he presented project that the FY16 operating budget could fall a bit compared to a hypothetical FY15 budget, or could rise as much as 10.4% as a consequence of other hypothetical FY15 budgets. Discussion followed about topics including: pending decisions about what services to include in the FY15 budget (upon which the Committee still must agree, and then vote in February to recommend to the Towns); staffing; anticipated levels of state aid and resultant expense offsets; whether to cut back staffing or some existing programs in order to add some positions and/or programs from a list of proposals discussed at recent Committee meetings; and whether returning funds from E&D to the towns (by reducing upcoming assessment bills) has any practical value if this would require increasing the assessments in the year(s) beyond. Dr. Harvey said if the Committee approves a budget that would cut some

positions, he wants to inform the individuals in those positions by mid-April. Discussion also touched on topics including transparency; whether, if budget increases appear inevitable, to try to distribute them smoothly over multiple years; and the need to communicate clearly with the community about whether program delivery would be affected by staffing changes or program budget restructuring. Discussion also touched on perceived shifts in the rapport between this Committee and Town leaders, and possible strategies for maintaining a collaborative working relationship; members discussed establishing an official liaison to each select board.

R. Kuebel departed at 9:37 p.m.; B. Wilson chaired the remainder of the meeting.

Discussion also touched on topics including the existing policy of returning E&D funds in excess of 3% of budget to the Towns; how that would occur, in practical terms; and state regulations regarding E&D.

In the final minutes of the discussion, L. Swartz twice moved to adjourn the meeting. The first motion was not seconded; the second motion was seconded by S. MacDonald but did not proceed to a vote.

FY14 Budget Surplus and FY15
Budget Discussion with town officials

Future Budget Communications
with Towns

Dr. Harvey noted he, R. Kuebel, and J. Sands are scheduled to meet Jan. 29 with the Towns' finance committees, and those committees are to attend the School Committee meeting of Feb. 3. Dr. Harvey also is to meet with the Hamilton town manager and Wenham town administrator to discuss specific budget figures. D. Evans suggested that B. Wilson (who as vice-chair, per Committee practice, is on track to chair the Committee in 2014-15) participate.

ADJOURNMENT:

BILL WILSON MADE A MOTION THAT THE HW REGIONAL SCHOOL COMMITTEE VOTE TO ADJOURN. SHEILA MACDONALD SECONDED THE MOTION. THE MOTION PASSED 6-0-0-3.

The meeting adjourned at 9:55 p.m.

DOCUMENTS AND EXHIBITS USED AT THIS MEETING:

Draft policies (Education of Pregnant and/or Parenting Students;
Developing Educational Specifications; Facilities Planning;
Consultants; Naming Facilities; Buildings and Grounds Maintenance;
Safety Program; Staff Accident Reports) (8 pages)
Expenditures data for all MA districts and for group of peer districts
(3 pages)
FY15 Budget scenarios 1.16.14 (6 pages)

Respectfully submitted,

Ann Sierks Smith, School Committee recording secretary



HAMILTON WENHAM EDFUND PROJECT GRANT APPLICATION FORM

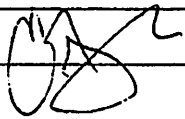
Project grants are for projects of \$1,000 or more, and should be designed to influence or advance the school system's interest in areas such as curriculum, technology, teaching methods, special school projects or specific innovative interdisciplinary projects.

Name(s) of Application Contact(s): Eric Tracy
 Submission date: January 14, 2014 Date approval needed: As appropriated
 Contact(s) phone number: (978)468-0400 Email: e.tracy@hwschools.net
 Position or Title of Application Contact(s): Principal - HWRHS
 Grant Title: Chromebooks and Mobile Cart
 School(s): HWRHS Grade(s): 9-12
 Amount requested: \$10,000.00 Recurring costs: None

Please address the following topics:

1. Has this grant been funded in the past? If yes, from what source?
2. Description of project and purpose.
3. Describe how this grant meets the goals of the Edfund Grants Program (see Edfund Grant Guidelines and Criteria at <http://hwedfund.org/applications-criteria.htm>.)
4. Number of students and/or teachers to benefit.
5. Budget Detail (Please list or attach itemized sheet of all costs for speaker, guest performer, training, consultant, equipment, materials, etc. and include when appropriate, photocopy of catalog page, price list or other documentation of cost). The estimated ratio of dollars spent per student is taken into consideration.
6. Possible future expenditures linked to this project (i.e. maintenance, parts replacement, professional development, etc.) including timeframes.
7. Method of evaluating success of project (i.e. student feedback).

Additional Comments: _____

Signature(s) of Applicant(s):  Date: January 9, 2014

Approval

Please submit grant application to your Principal for approval before sending to Donna Gourdeau at edfundgrants@gmail.com, Edfund Grants Committee Chair with a copy to Assistant Superintendent of Schools for Learning, Dr. Celeste Bowler at c.bowler@hwschools.net.

Principal:  Date: January 9, 2014

Revised 9/14/2012

Memorandum

To: Hamilton Wenham EdFund
CC:
From: Eric Tracy, Principal HWRHS
Date: 1/9/2014
Re: Grant request – 30 Chromebook Laptops and Cart

Thank you for your ongoing support for student-centered initiatives throughout the district and for considering this technology request. As you may know, we have been working to implement a 1-1 device initiative at HWRHS. Your previous support of the iPad pilot that is currently ongoing has yielded lots of valuable and useful information for the development of a larger scale 1-1 adoption.

Our current proposal for a larger scale 1-1 program is a part of the current school district budget proposal for the 2014-15 school year. It involves moving towards iPads as the device of choice for grade 9 and 10 students next school year.

Throughout the current pilot, we have learned that the iPads are not the perfect device, but the device that meets the greater majority of our needs. To that end, we have also learned from the students in the current pilot and from our English teachers that the iPad is not the best option for long-term writing assignments. We have found, however, that the Chromebook laptop is the perfect solution to this problem. The Chromebook is inexpensive and due to your generosity, is a viable tool that has been used extensively by our English teachers in the writing process with great success.

We are proposing to purchase another 30 Chromebooks and a mobile cart to supplement our transition to the 1-1 iPad pilot. The cart would be available for use by all students, including the 11th and 12th grade students who will not be involved in the 1-1 initiative at this time.

January 9, 2014

Budget:

	Unit cost	Total
30 – Samsung Chromebooks (or equivalent)	\$249.00	\$7470.00
Bretford Chromebook Cart (36 laptops)	\$2200.00	\$2200.00
Total		\$9670.00

We will continue to evaluate our 1-1 initiative and all peripheral components throughout the development and implementation cycles. We are and will continue to survey our student and staff both formally and informally. We will continue to use the data to evolve the current and future model with the goal of continually meeting the needs of students and staff as they work towards the creation of a truly world class educational environment.

Thank you for your consideration. I will be available at the January 14th EdFund meeting to further describe and clarify this request.

Leone, Vincent

From: Donna Gourdeau <dfgourdeau@gourdeau.com>
Sent: Wednesday, January 15, 2014 10:39 PM
To: Tracy, Eric
Cc: amydesimone12@gmail.com; Leone, Vincent; Harvey, Michael; Bowler, Celeste; Menegoni, Bryan
Subject: Edfund Project Grant-Chromebooks (HWRHS)
Attachments: Acknowledgement and Acceptance of Terms (Chromebooks#2 01.15.2014).doc; Chromebooks and Cart (HWRHS)-Application.pdf

Eric - On behalf of the Hamilton Wenham Edfund, I am pleased to inform you that the "Chromebooks and Mobile Cart" project grant proposal for \$10,000.00 was approved by the Edfund board. Congratulations!

To accept this grant we require the following:

- **Grant Acknowledgement and Acceptance form:** Please sign and return the attached *Grant Acknowledgement and Acceptance* form to the Edfund (see form) to indicate your acceptance of the provisions and obligations outlined on the form.
- **Public Acknowledgement:** In support of our efforts to communicate to our donors how their donations are being used, we will be promoting your grant results on our website and among other public materials. We ask that you provide photos of students engaged in the project for publication (please submit photos in digital format). Please be sure any photos you submit to us of students have the required parental permission release for the children in the photo to be publicized. Feedback from students may also be published publicly. We also request that you acknowledge the Edfund in any communication, written or electronic promoting the "Chromebooks and Mobile Cart" project grant.
- **Student and Teacher Feedback:** Please submit student feedback on the impact of the proposed project soon after the project has been implemented and no later than the end of the 2013-2014 school year. Student feedback can be provided in a variety of ways but the most simplistic means is a handwritten paragraph about the student's experience. This helps to solidify the students' experience and provides objectivity for the Edfund.
- **Grant modifications:** Please contact me should you wish to make any significant modifications to your project. You will need approval of the Edfund Board.

Payment:

Attached are the new payment procedures for funding the Edfund Grants. **Your next step is to send the attached Grant Acknowledgement Form with a detailed budget to the business office for payment with a copy to the Edfund.** Amy DeSimone, Edfund Treasurer, and Vinny Leone, of the HW District Business Office, are copied on this email and can assist in this process. Attached is a copy of the approved grant for the Business Office to initiate the process.

Please confirm your agreement to the above requirements by replying to this email. Again, congratulations! We are pleased to support the "Chromebooks and Mobile Cart" grant and look forward to following the impact of the project on teaching and learning in the Hamilton Wenham schools. Please feel free to contact me should you have any questions.

Sincerely,

Donna Fraser Gourdeau

Chair, Edfund Grants Subcommittee

Email: dfgourdeau@gourdeau.com

Phone: 978-835-2991



Edfund
Hamilton Wenham

Grant Acknowledgement and Acceptance of Terms

PLEASE COMPLETE AND RETURN BY EMAIL TO THE FOLLOWING:

- 1. Edfund-Amy DeSimone at amydesimone12@gmail.com and**
- 2. Hamilton Wenham Administration-Vincent Leone at v.leone@hwschools.net**

We accept this grant from the **Hamilton Wenham Education Foundation** and agree to abide by the following associated provisions and obligations:

- 1) The purpose of the grant is to be accomplished as proposed. The project's current budget, as previously submitted to the Edfund with the grant proposal, accurately reflects the grantee's intentions to expend the amount of this grant. Expenses not included in the project budget must be approved in advance by the Edfund.
- 2) Any photos and student feedback will be provided to the Edfund within 30 days of the grant's implementation. If applicable, student feedback can be a handwritten paragraph reviewing their experience.
- 3) Funds not used for the express purposes described in the grant proposal that are not used by the end of the 2013-2014 school year (or a mutually agreed upon date) are to be returned to the Edfund.
- 4) It is not necessary to issue a tax receipt for this donation as the Edfund is a 501 (c) (3) public charity. Also, please keep in mind that public schools do not have to pay a sales tax.

The Grantee's deposit or endorsement of the enclosed check will also constitute its agreement to the terms and conditions set forth above.

School Name: Hamilton Wenham Regional High School

Name of Contact on the Edfund Grants Subcommittee: Donna Gourdeau

Title of Grant Application: Chromebooks and Mobile Cart

Grant Amount Approved and Date Requested: \$10,000.00

Grant Requestor's Name: Eric Tracy Title: HWRHS Principal

Email Address and Phone Number: e.tracy@hwschools.net ; tel: 978-468-0400

Please attach a detailed budget with payment instructions below for District payment

Check should be payable to:

Please remit check to (contact name):

Address of where check should be sent:

Date by which check should be sent:

Date District requested funds of Edfund for reimbursement:



HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT

SCHOOL CHOICE AT HAMILTON-WENHAM REGIONAL HIGH SCHOOL

Report to the Superintendent

By

The Committee on School Choice

November 14, 2013

Knowledge • Responsibility • Respect • Excellence

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Table of Contents

Executive Summary	P. 4
Statement of Purpose.	P. 5
Members of the Committee	P. 5
Methodology	P. 5
Background of School Choice.	P. 6
Background: Fixed and Variable Costs.	P. 7
Legislative History and Process	P. 8
School Choice at HWRSD	P. 9
Capacity at HWRSD	P. 12
Course Offerings.	P. 13
Summary of data from focus groups and interviews	P. 14
Financial Costs of School Choice	P. 16
Impact of Choice on Class Size and Instruction.	P. 18
Summary of Financial Analysis.	P. 20
Inflation Factor for funds received from sending districts.	P. 20
Special Services	P. 20
Transportation.	P. 20
Other Costs: Staff Time	P. 21
Recommendations	P. 22

APPENDICES.	P. 23
Appendix A: Selected References	P. 23
Appendix B: Executive Summary - Hamilton Wenham Regional School District Demographic Study	P. 24
Appendix C: Additional considerations	P. 25
Appendix D: Legal Statute	P. 26
Appendix E: Process of Admitting Choice Students	P. 26
Appendix F: Geographic Distribution of Choice Students	P. 28
Appendix G: Detail on Fixed vs. Variable Costs	P. 30
Appendix H: Impact of Class Size on School Choice	P. 36
Appendix I: Special Education data.	P. 37

EXECUTIVE SUMMARY

In fall 2012, Superintendent Michael Harvey charged the School Choice Committee with evaluating the costs and benefits to the District of the School Choice program at Hamilton-Wenham Regional High School. The committee, which included three residents and three staff members from the District, conducted extensive qualitative and quantitative research. Members of the committee reviewed the legislative background, the history of the program at the District, and the capacity of the facilities. We interviewed or held focus groups with teachers, parents, staff, administrators, coaches, and residents. In addition, we estimated the cost of educating Choice students using two separate methods, which produced similar numbers.

The committee concludes that although there are significant benefits to the School Choice program, it costs more than it brings in revenue to the District. The number of resident students is diminishing and demographic research forecasts that this trend will continue. In addition, the High School building does not meet MSBA guidelines for the capacity of 720, which is the target number.¹

The committee, therefore, makes two recommendations:

1) Substantially reduce the current target number of 720 students at the High School to one that more accurately reflects the capacity of the building and the number of students from Hamilton and Wenham. This reduction should occur over four years to allow current Choice students to graduate and to minimize the effects on staff.

2) Assess annually the number of out-of-district students who could be admitted to the High School without requiring an increase in the number of class sections.

Additional considerations may be found in Appendix C.

¹ See Appendix B: Hamilton Wenham Regional School District Demographic Study, Cropper, 2013.

HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT

Report of the School Choice Committee

November, 2013

Statement of Purpose

In late 2012 this committee was charged by Superintendent Michael Harvey with analyzing the costs and benefits of School Choice at HWRHS and began meeting in January of 2013. Members of the committee decided to look at the ways in which School Choice affects academic, athletic, and extracurricular programs as well as support services. We also considered the effects of School Choice on students and their parents, the staff of HWRHS, and residents of Hamilton and Wenham.

Members of Committee

Peter Gray, Business Manager
John Hughes, Principal, HWRHS
Kelly Keating, STAY Teacher, HWRH

Barbara Lawrence, School Committee member
Charlotte Lidrbauch, School Council member
Jeffrey Stinson, former Hamilton Selectman
and graduate of HWRHS

Note: At the end of the 2013 school year, Peter Gray, Kelly Keating, and John Hughes left their positions with the District. We are very grateful for their participation in this project, and to Eric Tracy, Principal of the High School, and Vincent Leone, District Accountant, who joined the committee this summer.

Additional Assistance:

Arthur Oberheim, former member of Hamilton FinCom
William Wilson, School Committee member

Methodology:

The Choice Committee included three people from the School District and three from the community, which gave it a broad and balanced perspective. After reviewing information available about the Massachusetts School Choice program and the charge by the Superintendent, the committee determined that it needed to conduct both qualitative and quantitative research. The committee conducted interviews, held focus groups, and analyzed historical records.

In addition to this qualitative inquiry, the Committee collected quantitative data including:

- Fixed and Variable Costs (Appendix B)
- Demographic Data (Appendix C)
- Special Education Testing of School Choice Students (Appendix D)
- Transportation of Choice Students
- Courses taken by Choice Students

Background of School Choice:

There is very little literature on school choice, and most of it comes from conservative organizations like The Heritage Foundation that promote the program to increase competition as an incentive for public school improvement. Where appropriate, we draw on findings from the review of literature in this report. Many school choice programs in other states besides Massachusetts offer vouchers parents may use in private and charter schools, which School Choice in Massachusetts does not, and the bulk of research is about such programs.

School Choice in Massachusetts:

In 1991 newly-elected Republican Governor William Weld proposed legislation designed to allow students to attend public schools in other districts. The goal of what became known as School Choice was to give families that could not afford to move or to pay private school tuition a way to send their children to higher-performing schools. The program has grown substantially over the years, but may not be meeting its initial goal.

Education policy analyst Erin Dillon notes in “Lost in Transit,”² that because few districts ringing urban areas offer School Choice, the number of truly low-income students served by School Choice is minimized. Some such districts have opted out of School Choice because the School Committee decided that its district was not able to serve the needs of the urban students it received.

The causes for the growth of the program are unclear, but perceived benefits are a likely factor. Choice students appear to bring welcome income to the receiving district, and there has not been an analysis of the real costs that might discourage this trend. In addition, Choice students give districts a way to stabilize enrollment, which helps retain teachers and programs. Being a predominantly receiving district is also a symbol of success and pride.

There can be problems, however. Some districts have built budgets, programs on the premise that they would attract School Choice students, only to have few or none apply. Demographic

² Dillon, Erin, 9-4-2008, Education Sector (<http://www.educationsector.org/publications/lost-transit>)

trends suggest schools in our area are losing students, so competition for Choice students is likely to increase as enrollment declines throughout the North Shore.

Statewide, the School Choice program has grown steadily since it began in 1991. In 1992, 920 (FTE) students participated, 32 districts received pupils, 116 sent students, and just under \$5 million in funds transferred. In 2012, 290 districts sent almost twelve thousand students to 174 receiving districts and just over \$74 million dollars of tuition transferred between these districts. There is no requirement for reciprocity between districts.

Background: Fixed and Variable Costs

Regardless of the benefits of the School Choice program, and there are many, taxpayers are concerned about costs. To determine the true costs of the program, it is essential to differentiate between fixed and variable costs. Fixed costs include payments made regardless of the number of students served. Variable costs are those that fluctuate as the number of students changes.

In May, 2007 conservative columnist Dan Lips suggested that School Choice actually benefits sending districts. He pointed out that tuition sent to the receiving district is less per student than the cost of educating that student in the home district. This results in a net gain for the sending district and a higher expenditure per pupil for its remaining students. There are, however, flaws in this analysis because Lips does not separate fixed and variable costs.³

Dr. Benjamin Scafidi, writing for the Friedman Foundation, points out that few analysts separate fixed and variable costs when computing the value of tuition received for Choice students. He takes the average per pupil expenditure in 2008-09 nationally and suggests that "36 percent of these costs can be considered fixed costs in the short-run. The remaining 64 percent, are variable costs, or costs that change with student enrollment."⁴ He explains that he has "over-estimated" fixed costs in order to favor School Choice.

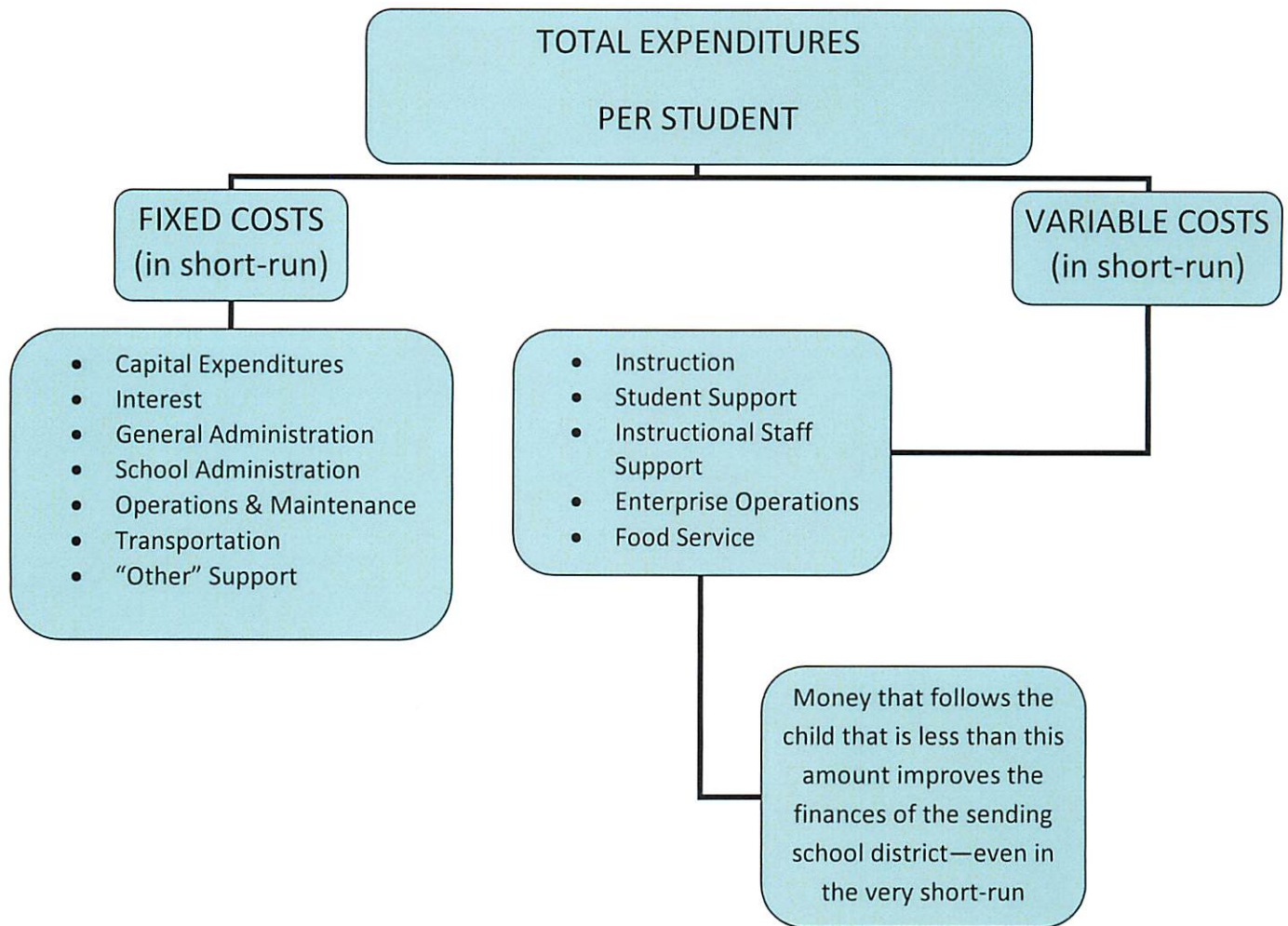
Scafidi assigns the following categories to fixed costs: "expenditures on capital, interest, general maintenance, transportation, and "other support." Scafidi allocates remaining expenses including: instruction, student support, instructional staff support, enterprise operations, and food services to variable costs because these depend on the number of students enrolled. He notes, however, that costs that are fixed in the short run can change over time as a district decides, for example, whether or not to build a school, or change the way in which it transports students.

³ Lips, Dan, *New Research Shows Additional Benefits of School Choice*, The Heritage Foundation, May 18, 2007. P. 1.

⁴ Scafidi, Benjamin, Ph.D., March, 2012, *The Fiscal Effects of School Choice Programs on Public School Districts*, The Freedman Foundation, pgs. 1 + 12.

Fixed Versus Variable Costs

While inflation alone should not define the true cost of school choice, the following chart represents another approach in determining the cost of school choice within a school district. Determining fixed versus variable costs is the approach.



Source: The Fiscal Effects of School Choice Programs on Public School Districts, Benjamin Scafidi, Ph.D. March 2012

Legislative History and Process

In 1991, the Massachusetts legislature enacted M.G.L. Chapter 76, Section 12B, creating the School Choice program. Since that time, this program reimburses the receiving school district \$5,000 per student from the sending school district.⁵

⁵ This amount may vary depending on whether or not the student receives Special Education services.

There has been increased discussion over the past couple of years surrounding the reimbursement amount for school choice students. Since 1993, school district spending in the state of Massachusetts has increased by \$7,000,000,000. This increase has been reflected in significantly higher costs per pupil. Since 2006 alone, average per-pupil spending in the state increased from \$10,600 to \$13,636 in FY12,⁴ the thirty percent increase reflects a trend that does not seem to be slowing.

The most effective option in taking on these increased costs and the lagging amount for school choice reimbursement should be through the legislative process. However, our local legislators, as well as legislators outside of our district, tell us that an increase in per pupil reimbursement is very unlikely to pass either the House or the Senate any time soon. The principal reason is legislators with “sending” school districts within their constituencies are likely to block any attempt to increase the amount their districts would have to send per pupil for students who choice out of the district.

Our legislators have assured us that if we chose to push a legislative agenda on this topic, they would support it. However, this route would not be productive considering their candid analysis of the current public policy concerns surrounding this issue.⁶

School Choice at Hamilton-Wenham Regional High School

A search of School Committee minutes from 1991 onwards reveals that in 1991, when the program was made law, the HWRSD School Committee decided not to participate primarily because there was little time in which to review implications of the new legislation. Committee members, however, noted that the income from Choice students would be a welcome windfall for the District.

High School Principal John Elwell stated that the high school had benefitted from the students who tuition-in because they brought “a broadening experience for our students as well as helping the district financially.” Because of the School Committee’s concern about negatively affecting other public school districts, Mr. Elwell recruited students from private schools and most tuition students came from that source.

In 1992, the School Committee voted reluctantly to accept Choice students from other public school districts. Expected benefits of increased income and diversity outweighed concerns about taking students away from other districts. Principal John Elwell noted that 17 tuition students would be graduating and that if they were not replaced; the high school would have to lay off teachers and reduce programs. He added that offering placement for 50 Choice students would allow him to retain current teachers and programs and hire an additional 1.5 teachers so class size would not be affected.

⁶ <http://www.doe.mass.edu/finance/statistics>. Figures available as of October 27, 2013

The agreement to tuition-in students from Essex terminated after 1995 and by 2000 Essex students had graduated from the high school, which opened slots for Choice students.

Over the years there appears to have been little discussion in School Committee meetings of the costs of School Choice. In 1992, the School Committee mentioned the amount of work the School Choice program required from guidance, administration and secretarial staff. One member also noted that there should be an additional part-time administrative staff person handling Choice.

In HWRSD the pattern of School Choice differs significantly from the steady growth seen in the program statewide. Data is not available for the years from 1992 to 1995, but as shown below, in 1996 the district received 128 students and \$592,382 in tuition, while paying out \$77,455 for 15 students who attended different districts. The number of pupils and the tuition they brought to the district peaked in FY2000 when the District received 211 Choice students and \$1,112,383 in tuition. In that same year the District paid \$34,814 in tuition for 7 students who attended school in other districts. By 2007 these numbers shrank to 101 students and \$539,312 in revenue. In FY 2014 there are 115 Choice students at the high school, which represents about 20% of the incoming freshman class and 17% of the student body.

TABLE 1: HWRHS Enrollment including Choice

	<u>FY 91</u>	<u>FY 92</u>	<u>FY 93</u>	<u>FY 94</u>	<u>FY 95</u>	<u>FY 96</u>	<u>FY97</u>	<u>FY98</u>	<u>FY99</u>	<u>FY00</u>	<u>FY01</u>	<u>FY02</u>
Total enrolled	617	644	682	667	697	718	684	691	699	698	728	691
FTE REC'D						128.68	139.42	162.26	192.51	211.44	187.83	137.30
\$ Recv'd						\$592,382	\$677,627	\$836,126	\$995,427	\$1,112,383	\$998,847	\$719,088
FTE SENT						15.42	7.69	7.54	7.74	7.63	4.49	5.00
\$ Paid						\$77,455	\$41,728	\$74,008	\$41,698	\$34,814	\$23,669	\$34,420
	<u>FY03</u>	<u>FY04</u>	<u>FY05</u>	<u>FY06</u>	<u>FY07</u>	<u>FY08</u>	<u>FY09</u>	<u>FY10</u>	<u>FY11</u>	<u>FY12</u>	<u>FY13</u>	<u>FY14</u>
Total enrolled	719	717	713	711	716	715	726	698	685	705	698	678
FTE REC'D	126.98	107.58	100.00	109.31	101.00	116.57	117.93	101	106.26	96.37	109.27	115
\$ Recv'd	\$630,280	\$553,865	\$510,433	\$569,312	\$539,357	\$623,103	\$620,329	\$522,259	\$559,744	\$507,539	\$567,744	\$564,994
FTE SENT	12.13	10.98	8.10	6.70	10.35	6.34	2.22	4.00	2.59	4.86	4.93	4.00
\$ Paid	\$119,143	\$102,316	\$62,914	\$34,337	\$53,242	\$32,260	\$11,100	\$28,560	\$19,452	\$19,452	\$24,650	TBD

TABLE 2: Enrollment by Grade and Enrollment of Choice Students**ENROLLMENT BY GRADE: 2000-2013 HWRHS**

	9th	10th	11th	12th	TOTAL
FY 2000	178	179	183	158	698
FY 2001	192	180	176	180	728
FY 2002	177	187	168	159	691
FY 2003	176	187	190	168	719
FY 2004	184	174	180	179	717
FY 2005	183	187	166	176	713
FY 2006	190	180	182	158	711
FY 2007	174	181	178	182	716
FY 2008	171	179	183	182	715
FY 2009	190	170	182	184	726
FY 2010	167	186	171	173	698
FY 2011	173	166	178	166	685
FY 2012	175	180	172	176	705
FY 2013	169	175	183	167	694
FY 2014	165	163	170	180	678

Percentage of Choice 2000-2013 HWRHS		Resident	Choice	% Choice
	Total			
FY 2000	698	486.56	211.44	0.30
FY 2001	728	540.17	187.83	0.26
FY 2002	691	553.7	137.3	0.20
FY 2003	719	592	126.98	0.18
FY 2004	717	609.42	107.58	0.15
FY 2005	713	613	100	0.14
FY 2006	711	601.69	109.31	0.15
FY 2007	716	615	101	0.14
FY 2008	715	598.43	116.57	0.16
FY 2009	726	608.07	117.93	0.16
FY 2010	698	597	101	0.14
FY 2011	685	578.74	106.26	0.16
FY 2012	705	608.63	96.37	0.14
FY 2013	694	583	111	0.16
FY 2014	678	563	115	0.17

For a review of the process, see Appendix E

TABLE 3: STUDENTS ADMITTED TO CHOICE AND NUMBER WHO ACCEPTED

	Applications received	Slots offered & accepted	% accepted	# enrolled 10/1/13
SY 2014				
Grade 9	105	37	35%	33
Grade 10	17	6	35%	
Grade 11	9	1	11%	
Grade 12*	1	2	200%	

*siblings of current
Choice students
are accepted

In the spring, the Principal of HWRHS consults with the Superintendent of Schools to set the target number of Choice students to be accepted. Generally, the target number of Grade 9 students is set to equal the number of Grade 12 students who graduated the previous June. Students in other grades are accepted based on the availability of space in the class. Applicants for School Choice are randomly assigned a number to determine their priority for admission. Students are offered admission in the Choice program on the basis of their priority number until the target number for each grade is reached.

Capacity at Hamilton-Wenham Regional High School

The question of whether or not to participate in the Choice program is ultimately one of numbers. Whether the program makes fiscal sense for the District is addressed in the section on Finances. The Committee decided that in addition to understanding the financial costs or benefits of the Choice program it was fundamentally important to understand the actual capacity of the high school.

It has long been held that the student population at the high school should be somewhere around 720, with 180 students per class. Choice has been viewed as the vehicle to help reach that goal, as the resident population often does not yield those numbers. The number of students in any class can vary widely, as middle school students decide to attend private schools, residents move in, residents move out, Gordon-Conwell student numbers ebb and flow, and resident students return from private middle schools to attend the high school. The actual number of students is a moving target often up to the first day of school.

We have been unable to find a rationale for the 'optimal' enrollment figure of 720; only anecdotal knowledge. It was suggested that 720 is the number that the Fire Chief at one time estimated would be the proper capacity. Many teachers remember that Assistant Principal Phil

Conrad suggested 720 as the ideal number of students to support existing programs. The auditorium has about 600 seats, which would seem to indicate when it was built that was the expected capacity (the ability to have an entire school seated for assemblies being an integral part of any building size planning). Current MSBA regulations, however, would only support an auditorium that seats 2/3rds of the student body, not including Choice students.

Table 1 above shows HWRHS enrollment since 1991, the earliest date for which information is available on the DESE web site.

The highest enrollment in this time frame was 728 (2001), the lowest was 617 (1991). 2014 enrollment is 678.

On October 23, 2008, representatives of Dore & Whittier presented their *Demographic and Space Needs Assessment to the School Committee*. As part of their report, they conducted a survey of the buildings in the District, including the joint Middle and High School.

The report concluded that “the majority of Hamilton-Wenham Regional High School classroom are undersized per MSBA guidelines, especially science classrooms, which have more students per class than intended per the district’s class size policy. Secondary spaces, such as orchestra, chorus and life management programs, are too small to accommodate all interested students in the existing spaces.” Specific sizes can be found in the Executive Summary, Section II, page 4, but are compiled and averaged in the chart below, taken from the slide deck to the School Committee. Total square footage of the high school was estimated at 125,618. Enrollment at the time of the report was 732, resulting in the figure of 172 SF/student in the chart. Adjusting to the 2014 enrollment of 678, increases the average to about 185 SF/student. Which is still below the MSBA recommended average of 200 SF/student.

Hamilton-Wenham Regional High School	Existing Averages	MSBA Standards
Average Building SF Per Student	172 SF/student	200 SF/student
Classroom Space	852 SF	950 SF
Science Space	1020 SF	1200 SF
Computer Classroom Space	656 SF	2400 SF
Special Education (self contained)	440 SF	950 SF
Small Group/Resource Rooms	522 SF	500 SF
Media Center/Library Space	3490 SF	3650 SF
Art Space	1134 SF	1350 SF
Music Space	1350 SF	2125 SF
Vocations/Technology Space	1325 SF	4000 SF
Auditorium Seating (2/3 population)	3490 SF	4800 SF
Gymnasium	12800 SF	10000 SF
Administration and Support Spaces	1310 SF	2020 SF
Guidance Suite	890 SF	1050 SF

In order to achieve 200 SF/student, the projected enrollment for the High School would be approximately 630 students.

Course Offerings

Another commonly-held belief is that a school needs to have a minimum enrollment threshold in order to provide a reasonable number of course offerings. Too small, it is thought, and the number of courses that can be offered will suffer.

An examination of the course offerings at Manchester-Essex Regional High School, Lynnfield High School and Ipswich High School from their 2013-14 Course Offerings, all of which can be found online, show that despite their small school populations, they all have similar or more course offerings and summarized below:

2013 enrollments and number of courses offered at other small high schools in the area:

School	2013 Enrollment	# Courses offered FY14
Rockport	305	Not found
Manchester-Essex	480	122
Ipswich HS	614	137
Lynnfield	625	145 +/-
Hamilton-Wenham	698	106

Impact on Facilities

This committee defers to the Master Facilities Planning committee and the consultants they hired for a more complete analysis of the impact of Choice students on facilities. However, we note that MSBA will not include Choice students in planning for or reimbursing renovation or construction. We must consider whether or not an addition to the high school would be necessary if there were fewer students, as well as the possibility of reduced cost for maintenance, custodial services and supplies for a smaller school.

Summary of data from Focus groups and interviews

Members of the Choice subcommittee, usually working in teams of one person from the community and another from the District, conducted numerous focus groups and interviews. It was not possible, however, to schedule some focus groups and interviews with more than one member of the committee. We found that:

Administrators, teachers, and coaches support the School Choice program enthusiastically. They believe that it brings diversity in at least experience and perspective, a welcome cohort of

new students, and increases programmatic possibilities. Coaches and teachers are passionate about their belief that the Choice students raise the horizon for resident students, and provide opportunities for students from less privileged backgrounds is a core value for many.

Staff managing the Choice program puts a considerable burden on the time of Guidance personnel as well as their support staff and the Assistant to the Principal. See the section “Other Costs: Staff Time” on page 19.

Resident students believe that the Choice program offers new opportunities for friendships and diversity by bringing students who have different perspectives and experience to their school. HWRHS students said that they are proud of their school and they like to share the benefits of attending HWRHS. Most students, however, in the Focus Groups also thought there were only 30 - 45 Choice students at HWRHS, and stated that are rarely aware of which of their fellow students are Choice until they need a ride home after an event.

Choice students appreciate the opportunity to attend the high school. They believe it offers a much stronger academic culture and more chance to excel than the high schools in their own towns. Several noted that they have siblings who attend private schools and their parents are also grateful they do not have to pay tuition for a comparable education. Choice students also thought there were fewer than 50 - 60 Choice students at the high school.

Parents are less familiar with or even aware of the Choice program than teachers and students, which is to be expected. However, we were surprised by how little they seem to know about the program. Parents believe that School Choice brings diversity and benefits their children; however they do not necessarily support the program if it costs the District money.

Residents Senior citizens supported the goals of Choice program to bring diversity and new students to the High School. They also are concerned that a smaller high school might not be able to offer a strong curriculum with a range of options. They thought the Choice students bring an excitement for learning to the school that is revitalizing. However, they could not support a program that costs taxpayers money. They do not think the figure for reimbursement will be increased, and are concerned that if the number of resident students continues to decline, there would be an increasing percentage of Choice students, which they do not think is advisable. They were surprised by how many Choice students already attend the High School and that the school has to advertise the program and work to attract students. The fiscal realities of Choice matter a lot to them, but the quality of education we provide for our high school students does as well.

Some residents in a different focus group were concerned about the cost and ‘economics’ of the program, but others noted that it adds diversity and welcome new faces to the school. People stated that Choice helps stabilize the infrastructure. One person said that Choice students are just “filling the bus,” so do not cost the District and its taxpayers additional money.

Estimates of the number of Choice students ranged from 50 to 150. There was considerable agreement, however that people in the group knew little about the Choice program and would like to know more.

Survey of Educators:

A survey of the high school teachers conducted by Principal Eric Tracy clearly underscores their preference to continue the Choice program at the high school. Of the 50 teachers who responded to the survey, forty-six felt that the students from other communities are a benefit to HWRHS. The responses make the point that the Choice students positively added to the culture and their loss would be detrimental. They felt that students from other communities brought much needed diversity and a different perspective to our student body. They were also clear in their remarks that the Choice students help us to have and to maintain more robust extra-curricular programs. Several teachers felt that the Choice students are a positive addition to the community because their parents cared enough to have their children attend the best schools possible.

Six of the fifty respondents thought that the School Committee should end the School Choice program because of the cost in time and money to taxpayers of Hamilton-Wenham, and because some Choice students are less prepared than resident students. The majority of the teachers' responses, however, reflect a high level of support to continue the student Choice program at the high school.

Financial Costs of School Choice

Fixed and Variable Model:

We analyzed the financial costs from different perspectives. First, we learned from the review of literature about the work of Dr. Benjamin Scafidi, who demonstrated the importance of separating fixed and variable costs of educating students. Fixed costs such as facilities and administration need to be paid regardless of the number of students. Large fluctuation in the number of students, however, would affect expenses of both administration and facilities. Variable costs are those associated with serving the student population, for instance, in providing for instruction.

We asked Arthur Oberheim, formerly a member of the Hamilton FinCom, William Wilson, Financial Analyst and Vincent Leone, accountant with the District's Business Office to independently allocate fixed and variable costs without looking at the Scafidi model. All agreed with the model, and we then asked Vincent Leone to apply the model to Hamilton-Wenham Regional High School. Mr. Leone's analysis is as follows:

Fixed and Variable Costs for FY12 and FY13 at HWRHS:

Our first step in analyzing the cost of School Choice at Hamilton-Wenham Regional High School was to determine which costs were fixed and which were variable regarding Choice students. In FY13 there were 698 students at the HS, including 111 Choice students comprising about 16% of the student population. We made the following assumptions:

Administration is a fixed cost. Regardless of how many students the High School has there needs to be a Principal and his/her administrative support staff. The expense of hiring these educators including the expense of professional development and contracted services would not fluctuate. Department heads, the technology instructor, the tech aide, librarian, athletic director and secretary, and the custodians are also fixed costs because these positions would need to be filled even if there were no Choice students.

Classroom teachers, instructional aides, and guidance personnel would fluctuate as the number of students dropped, but allocations for occupational therapist, physical therapist and speech language pathologist were kept constant as there is only one of each. Contracted services for the individual program areas such as art or math would most likely fluctuate if the number of students dropped. Since there would be fewer teachers, expenses including professional development would decline as would the cost of supplies and materials. We project that the cost of gas, electricity and telephone would stay relatively constant, and only the expense of water and sewer would diminish with a lower number of students.

The total cost at the High School for FY13 amounted to \$6,140,645.87 of which \$1,345,529.17 was fixed and \$4,795,116.70 was variable. Using the Scafidi analysis suggests that not serving Choice students would remove approximately 16% of the students at the High School or about \$762,547 in variable costs. In 2013 the District received \$567,774 in tuition from the Choice program (tuition out was \$24,650) for a deficit of \$222,203. In FY 2014, it is anticipated that this deficit will increase to about \$248,000.

Costs for Choice Students

	FY12	FY13	FY14 - Est.
Total Fixed Costs	\$1,186,410.66	\$1,345,529.17	\$1,393,299.62
Total Variable Costs	\$5,064,642.14	\$4,795,116.70	\$4,709,909.70
High School Student Population	705	698	678
High School Student Choice Population	96	111	115
% of High School Choice Student to Total Population	13.62%	15.90%	16.96%
Amount of Variable Costs as % of Choice Students	\$689,653.40	\$762,547.21	\$798,878.49
Revenue In From Choice In	\$507,539.00	\$567,744.00	\$575,000.00
Expenses Out From Choice Out	\$19,452.00	\$24,650.00	\$25,000.00
Net Cost	\$201,566.40	\$219,453.21	\$248,878.49

See Appendix G: Fixed and Variable Costs

Impact of Choice on Class Size and Instruction

We also considered the ways in which the number of Choice students affects the number of sections the District must run. The preliminary figures below suggest that there could be a financial gain of about \$9,000 for the District from the Choice program in 2014. However, this analysis assumes that 1.2 FTE instructors are required to teach the total number of Choice students each year and does not take other costs into account.

Because there was a significant change in the number of classes offered at the High School from 2013 to 2014 (10) fewer we include two separate analyses: the first for 2014, and the second, in the Appendices, for 2013. Both are preliminary and relatively rough analyses, however, because they rely on the assumption that the number of courses a student needs to take throughout his or her career at the High School would remain constant, which is rarely the case. This model also does not take into account the “seats on the bus” argument that the impact of Choice students on electives is negligible since they are simply taking up otherwise “empty” seats in a classroom.

Hamilton-Wenham Regional High School									
School Choice Analysis for 2013-2014									
Actual HWRHS Enrollment 2013-2014						Projected Enrollment without School Choice			
Grade	Choice Students	Total Students	Current English Sections	Avg. per section	FTE	Students w/o Choice	English Sections w/o Choice	Avg per section	FTE
9	33	165	10	16.50	2.00	132	8	16.50	1.6
10	34	163	10	16.30	2.00	129	8	16.13	1.6
11	25	170	9	18.89	1.80	145	8	18.13	1.6
12	21	180	9	20.00	1.80	159	8	19.88	1.6
	113	678	38	17.84	7.60	565	32	17.66	6.4

Cost of School Choice	
FTE needed for Choice students	1.2
Staff cost for additional English FTE @ \$65,000 per 1.0	\$ 78,000.00
Projected staffing cost for Choice FTEs for 7 courses per student	\$ 546,000.00
School Choice Revenue 2014	
Amount per Choice Student	\$ 5,000
Number of Choice Students	113
Choice Revenue (est.)	\$ 580,000
Choice Students Out Expenses (est.)	\$ 25,000
Net Choice Revenue (est.)	\$ 555,000

Summary of Financial Analysis

These two methods of analysis produce very similar estimates of the cost of the School Choice program at HWRSD. Allocating a percentage of variable costs shows that there is a deficit of \$201,566.40 in FY 12 and \$219,453.21 in FY 13. The projected deficit for FY 14 is about \$248,000. Estimating the cost by looking at the number of FTE teachers required to teach Choice students each year shows a profit of \$9,000 for FY 14, however it only takes teachers' salaries into account, not benefits or other costs. Other variable costs that would increase as the student body increased through Choice include: supplies, materials, and other staff time. The District accountant estimates that these costs would bring the total up to an amount that would be very similar to the estimate using the variable cost method. The only way to decrease the deficit would be by increasing class size. (See Appendix H).

Inflation Factor for money received from sending districts

The District receives \$5,000 from the sending district for each Choice student. The Legislature of the Commonwealth set this amount in 1991 and has not changed it. The inflation rate since 1991 is estimated at 60%,⁵ which means the District would need \$8301.79 per student in order to receive the same amount of money as set by the State Legislature in 1991. This suggests that the difference between revenue and expenses for the School Choice program will increase each year.

Special Services

About 10% of Choice students receive special services. It should be noted that Choice students do not require out-of-district placement, which is the most expensive type of special service offered to students. Because of this, it would not be accurate to apportion the total cost of Special Services to Choice students. As costs of providing Special Education services to Choice students are reimbursed by the State, there is no cost to the District for these services.

It does cost the District staff time to evaluate Choice students who are referred after being admitted to the High School. During the past two years, the District has spent a total of between \$21,000 and \$24,000 annually testing Choice students to determine their eligibility for special services. See Appendix I

Transportation

The District is not responsible for transporting Choice students, therefore, there is very little impact on the budget. The District transports a small number of Choice students to and from

⁷ http://www.bls.gov/data/inflation_calculator.htm

the Hamilton-Wenham train station as part of a regular bus route that services the downtown area. The estimated cost of providing this service is less than \$2000 per year. When the train is late, the District used to send a small bus to pick up Choice students; however, the small bus is no longer available.

Other Costs: Staff Time

Guidance and 9th Grade Teachers

In addition to fiscal costs, running the School Choice program requires significant amount of staff time. The Guidance personnel spend much of the spring term recruiting and working with prospective Choice students and their families. Administrative assistants also spend a great deal of their time on matters directly relating to Choice students. In the fall, 9th Grade teachers invest time helping students' bridge academic gaps and adjust to their new school.

Secretarial and Support Staff

Attracting, accepting, and integrating Choice students into the High School requires a great deal of work by staff throughout much of the school year. Once the School Committee has approved Choice students for the following year, which usually occurs in November, the District places ads in local newspapers including. The Salem News, Gloucester Times, and Newburyport Times (see Appendix E). These ads run three times and cost approximately \$900. The Tech department develops the online application. Interested parents are instructed to go to the HWRHS web page and download and complete the Choice application online. There are always people who print it out and mail it. Staff keeps a spreadsheet of respondents, assigning each a number. Siblings are kept separate, as they do get preference. The ads run from November through the January 31st closing date, and generate many phone calls staff must handle. The lottery is conducted in early February and staff sends letters to the students with the top numbers commensurate with projected places at the High School.

Guidance Office personnel schedule three 'shadow days' in February for prospective students and their parents to tour the school, meet with members of the Guidance Department, as well as some administrators and teachers. They note that this can be disruptive to classes. Setting these days up requires time and effort on the part of administrative staff. For example, scheduling HS students willing to be shadowed requires time, and there are always Choice candidates who cannot be present on the regularly scheduled dates, so staff needs to arrange alternatives.

Parents are told the school needs their decision within approximately three weeks after the shadow day. Many don't respond within that time period however, probably because private schools admittance letters typically don't go out until early April. Staff must keep trying to contact these parents, often until the first days of school to find out if their child will be attending the high school.

Donna Bunk in the Central office handles registration materials. After she is sure the information is complete, she sends the packet to the high school. The guidance office gives the parents information about the online placement testing and after the results are back, Choice students come in to set up their schedules.

It is impossible to calculate exactly how much staff time is necessary to manage the Choice program. However, it is clear that it requires a great deal of effort for some staff, and takes time away from their other duties.

Business Office

Reimbursement for Choice students is handled by the state with minimal burden on HWRSD. The District submits its October SIMS report indicating the number of Choice students. In April, HWRSD submits the claim form that confirms the October SIMS (Student Information Management System) report; any difference is adjusted on the final payment received in June. The District usually receives the first payment in December or January.

Recommendations

The Choice program at HWRHS serves several valuable purposes, but it appears to be costing more money than the District receives in reimbursement. In addition, managing the program places a burden on staff. It also seems that the District may face a period when school districts on the North Shore are all competing intensively for students. If HWRHS requires a larger percentage of Choice students to meet the current target goal of 720 that supports existing infrastructure, it may continue to fall short of that number.

To meet these challenges the committee makes two recommendations:

- 1) Substantially reduce the current target number of 720 students at the High School to one that more accurately reflects the capacity of the building and the number of students from Hamilton and Wenham. This reduction should occur over four years to allow current Choice students to graduate and to minimize the effects on staff.
- 2) Assess annually the number of out-of-district students who could be admitted to the High School without requiring an increase in the number of classes.⁷

⁷ The Committee will suggest a means to accomplish this goal.

APPENDICES:

Appendix A: Selected References

Appendix B: Executive Summary - Hamilton Wenham Regional School District Demographic Study

Appendix C: Additional Considerations

Appendix D: Legal Statute

Appendix E: Process of Admitting Choice Students

Appendix F: Geographic Distribution of Choice Students

Appendix G: Detail on Fixed vs. Variable Costs

Appendix H: Impact of Class Size on School Choice; AP Enrollment

Appendix I: Cost of Special Education for Choice Students

APPENDIX A:

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APPENDIX: B

Executive Summary - HAMILTON WENHAM REGIONAL SCHOOL DISTRICT DEMOGRAPHIC STUDY

1. The fertility rates for the Hamilton-Wenham school district are below replacement levels during the entire life of the forecasts. (TFR=1.76 for the district vs. 2.1 for replacement level)

2. Most of the in-migrating households to the district contain population in the 0-to-9 and 30-to-44 age groups.

3. The locally raised 18-to-24 year old population (recent graduating high school seniors) continues to leave the

district, going to college or moving to other urban areas.

4. The primary factors causing the district's enrollment to decline after 2013 is an increase in the number of out migrants in the local 18-to-24 year old age group, the rise in the number of empty nest households and a slight decrease in the number of in-migrating of younger families.

5. Changes in year-to-year enrollment will largely be due to smaller grade cohorts in conjunction with larger grade cohorts leaving the system.
6. If there was zero migration in the district during the 2013-14 to 2016-17 time period, the elementary (K-5) enrollment would decline by 130 students. The elementary enrollment is forecasted to decline by 26 students the same period.
7. If the current home construction trends continue, the number of existing home sales and the occupancy rates of the rental housing units will continue to be the dominant factor affecting the amount of population and enrollment change.
8. Total enrollment is forecasted to decrease by 93 students, or -4.8 %, between 2013-14 and 2017-18. Total enrollment will decline by 70 students, or -3.8%, from 2017-18 to 2023-24.

TABLE FROM DEMOGRAPHICS STUDY

School	Live Out of District	Live In District	Unmatched	Total
Buker School	0	239	0	239
Cutler School	7	272	2	281
Hamilton-Wenham Regional High School	115	557	6	678
Miles River Middle School	4	432	6	442
SPED Out of District	0	36	3	39
Winthrop School	2	277	1	280
ZHistory School Archive	0	0	1	1
Total	128	1813	19	1960

APPENDIX C: Additional Considerations

- 1) Consider establishing competitive scholarships for low income students from other districts.
- 2) Consider participating in a foreign student exchange program such as AFS, or through Educatius.
- 3) Set a not-to-exceed limit for the percentage of Choice students in any given class.

- 4) Use money saved by not having as many Choice students to cover fees of participating in athletics and other extra-curricular activities, which should increase the participation of resident students and offset the loss of Choice students.
- 5) Increase options for intramural sports.
- 6) Increase use of distance learning with appropriate support, service learning, project-based learning, and internships to augment course offerings and educational opportunities for students at HWRHS.
- 7) Continue to invest in professional development for teachers who are not yet familiar with techniques for differentiated learning.
- 8) Set a number each year for the ideal number of Choice students to be added to the number of resident students at the high school without requiring additional staffing.

APPENDIX D: Legal Statute

- (f) For each student enrolling in a receiving district, there shall be a school choice tuition amount. Said tuition amount shall be equal to seventy-five percent of the actual per pupil spending amount in the receiving district for such education as is required by such non-resident student, but not more than five thousand dollars; provided, however, that for special education students whose tuition amount shall remain the expense per student for such type of education as is required by such non-resident student. The state treasurer is hereby authorized and directed to deduct said school choice tuition amount from the total education aid, as defined in chapter seventy, of said student's sending district, prior to the distribution of said aid and to deposit said aid in the School Choice Tuition Trust Fund established by section twelve C. In the case of a child residing in a municipality which belongs to a regional school district, the school choice tuition amount shall be deducted from said chapter seventy education aid of the school district appropriate to the grade level of the child. If, in a single district, the total of all such deductions exceeds the total of said education aid, this excess amount shall be deducted from other aid appropriated to the city or town. If, in a single district, the total of all such deductions exceeds the total state aid appropriated, the commonwealth shall appropriate this excess amount; provided, however, that if said district has exempted itself from the provisions of chapter seventy by accepting section fourteen of said chapter, the commonwealth shall assess said district for said excess amount.

APPENDIX E: The Process of admitting Choice Students

The process to attract and accept Choice students to the high school requires, in the words of a staff member, "a lot of work." It begins with word that the SC has approved Choice for the following year.

In November an ad is placed in the local Community News Holding papers: Salem News/Gloucester Times/Newburyport Times, which runs three times and costs approximately

\$900. The Tech department develops the online application. Interested parents are instructed to go to the HWRHS web page and download and complete the Choice application. This is to be done online, although she said there are always people who for one reason or another have to print it out and mail it. She then keeps a spreadsheet of respondents, assigning each a number as she receives the information. Siblings are kept separate, as they do get preference. She says she gets all kinds of phone calls from parents asking, e.g., what she can “do” for them to help them get in, and she tells them how her own daughter was #124 one year and couldn’t get in. She says she gets a fair number of phone calls from November when the ad runs through the January 31st closing date. In the beginning of February, the lottery is done, usually in the front lobby and last year it was videotaped. Letters are sent to the top numbers in the lottery that match with the number of spots available, and also sends letter to everyone else to let them know what their number is in the lottery.

Three ‘shadow days’ are set up by Guidance in February for the students and their parents to tour the school, meet with guidance, some administrators and teachers. Teachers would say this is disruptive to their class schedules. A fair amount of work goes into setting these days up (e.g., Mary Nicklas sends out a questionnaire to current HWRHS students who have been selected to have shadows to try to match them with a Choice applicant with similar interests), and there are always some students who are unable to make any of the days, so they come another time. Parents are told the school needs their decision by a certain date (approximately three weeks after the shadow day), and are asked to let the school know. Many don’t notify the school (probably because private schools admit letters typically don’t go out until early April, so they are hedging their bets). This requires work by staff right up to the first week of school.

Donna Bunk in the Central office handles registration materials. After she is sure the information is complete, she sends the packet to the HS. The Guidance Office gives the parent information about the on line testing (for math and English – Spanish too), after the results are back, students must come in and set up their schedule.

Ad placed in local newspapers to announce School Choice openings.



APPENDIX F:

Geographic Distribution of Choice Students FY 2011-2014

	2011	2012	2013	2014
Amesbury	2	1		1
Beverly	31	24	22	21
Danvers	3	5	6	7
Georgetown			1	1
Gloucester	8	9	14	19
Haverhill				
Ipswich	1	5	4	5
Lynn	6	4	4	7
Lynnfield		1		
Manchester-Essex	5	2	2	3
Newburyport				
Peabody	30	31	33	27
Rockport	2	1	4	3
Salem	13	12	13	14
Saugus	1	1	4	1
Triton	5	1	3	6
	107	97	110	115

Choice Status of Nearby Districts FY 13 - 14

DISTRICT	Choice FY 13	Choice FY 14
Amesbury	Yes (5-7, 9-12)	No
Andover	No	No
Beverly	Yes - 2-12	Yes
Boxford	No	No
Danvers	No	No
Georgetown	Yes K-1	Yes
Gloucester	Yes	Yes
Haverhill	Yes	Yes
Ipswich *	No (phasing out)	Yes (existing)
Lynn	No	No
Lynnfield	No	No
Marblehead	No	No
Middleton	No	No
Newburyport	Yes	Yes
North Andover	No	No
Peabody	Yes	Yes
Reading	No	No
Rockport	Yes	Yes
Salem	No	No
Saugus	No	No
Topsfield	No	No
REGIONAL DISTRICTS		
Manchester-Essex	Yes	No
Masconomet	No	No
Triton	Yes	Yes
North Shore Voc.	Yes	Yes
** Currently serving choice pupils from past years, but did not accept new enrollments for FY 13 http://www.doe.mass.edu/finance/schoolchoice/choicestatus.pdf		

APPENDIX G:

Detail on Fixed vs. Variable Costs

Fixed Costs		2011 - 2012 SY	2012 - 2013 SY
Account	Description	Total Expenses	Total Expenses
001.300.2210.1.3.090.100.5	PRINCIPAL SAL	\$175,696.38	\$229,146.28
001.300.2210.1.3.090.200.5	RHS CLERICAL SAL - PRINCIPAL	\$89,005.69	\$92,408.87
001.300.2210.1.3.090.400.5	CON SERV - PRIN	\$22,484.44	\$32,904.53
001.300.2210.1.3.090.500.5	EXP MATL - PRIN	\$4,953.96	\$24,705.42
001.300.2210.1.3.090.520.5	RHS NON EXP MATL PRINCIPAL	\$0.00	\$2,270.44
001.300.2210.1.3.090.600.5	RHS OTH EXP PRINCIPAL	\$0.00	\$486.66
001.300.2220.1.3.099.110.5	SAL/ DEPT HEADS	\$53,390.00	\$54,870.00
001.300.2220.2.3.099.110.5	SPED DEPARTMENT CHAIR ARTICLE 26.1	\$11,775.40	\$8,619.00
001.300.2310.1.3.027.100.5	TECH INSTRUCTOR SAL	\$51,775.24	\$38,318.39
001.300.2315.2.3.099.100.5	RHS PROFESSIONAL SALARIES	\$0.00	\$79,331.88
001.300.2320.2.3.099.100.5	RELATED SVC - OT, PT, SLP SALARIES	\$8,462.20	\$9,469.46
001.300.2330.1.3.027.300.5	RHS TECH AIDES SAL	\$0.00	\$20,600.97
001.300.2340.1.3.050.100.5	LIBRARIAN SAL	\$21,543.38	\$40,046.50
001.300.2340.1.3.050.300.5	LIBRARY AIDE SAL	\$16,747.00	\$13,966.22
001.300.2357.1.3.090.600.5	PROF DEVEL PRIN	\$849.44	\$567.69
001.300.2357.1.3.090.690.5	AFFILIATIONS/CONFERENCES	\$1,890.50	\$3,310.00
001.300.2420.9.3.099.620.5	RENTAL / LEASE EQUIP	\$27,513.61	\$27,055.65
001.300.2800.2.3.099.100.5	SCHOOL PSYCHOLOGIST SALARY	\$78,514.00	\$80,093.00
001.300.3200.1.3.042.130.5	SALARY NURSE RHS	\$57,405.62	\$61,761.17

001.300.3200.1.3.042.400.5	CONTRACTED SERV HEALTH	\$119.41	\$0.00
001.300.3200.2.3.042.130.5	RHS ASPIRE NURSE SAL	\$20,639.20	\$0.00
001.300.3510.1.3.022.100.5	ATHLETIC SAL RHS	\$93,110.00	\$94,891.52
001.300.3510.1.3.022.200.5	RHS ATH/CLER SAL	\$15,225.83	\$16,642.39
001.300.3520.1.3.067.460.5	CON SERV. - NAT. HISTORY DAY C	\$156.73	\$95.84
001.300.4110.9.3.099.320.5	CUSTODIAL SAL	\$171,268.20	\$173,116.92
001.300.4110.9.3.099.601.5	RHS CUSTODIAL TRAVEL	\$0.00	\$8.05
001.300.4120.9.3.099.670.5	GAS SERVICE	\$58,086.61	\$54,347.10
001.300.4130.9.3.099.650.5	ELECTRIC	\$106,915.14	\$93,631.58
001.300.4130.9.3.099.680.5	TELEPHONE	\$27,024.71	\$24,233.41
001.300.4220.9.3.099.420.5	YEARLY MAINTENANCE	\$71,857.97	\$68,630.23
Total Fixed Costs		\$1,186,410.66	\$1,345,529.17
Variable Costs			
001.300.2305.1.3.099.100.5	PROF SAL CLASSROOM TEACHERS	\$3,570,196.64	\$3,645,231.53
001.300.2305.2.3.099.100.5	SPED CLASSROOM TEACHERS SALARY	-\$51.47	\$0.00
001.300.2310.2.3.099.100.5	SPED SPECIALIST TEACHERS SALARY	\$715,714.12	\$472,307.39
001.300.2315.1.3.029.150.5	XTRA RESPONS. SAL	\$5,946.00	\$10,167.00
001.300.2330.1.3.020.400.5	CONT SERV FINE ARTS VISUAL	\$210.00	\$203.74
001.300.2330.1.3.044.400.5	CON SERV HEALTH/SCI FAM/CONSUM	\$415.58	\$415.00
001.300.2330.1.3.054.400.5	CON SERV - FINE ARTS	\$300.00	\$315.87
001.300.2330.1.3.057.400.5	CON SERV HEALTH SCI/PE	\$2,298.93	\$2,298.11
001.300.2330.1.3.064.400.5	CON SERV - SCIENCE	\$2,861.18	\$2,531.27

001.300.2330.1.3.099.300.5	INSTRUCTIONAL AIDES SAL	\$26,347.63		\$27,059.86
001.300.2330.2.3.093.300.5	SPED TA SALARY	\$68,990.52		\$28,544.89
001.300.2357.1.3.034.600.5	PROF DEVEL ENGLISH	\$991.05		\$260.47
001.300.2357.1.3.036.600.5	PROF DEVEL WORLD LANG	\$2,228.00		\$2,389.99
001.300.2357.1.3.041.600.5	PROF DEVEL GUIDANCE	\$230.00		\$400.00
001.300.2357.1.3.044.600.5	PROF DEVEL HLTH SCI FAM/CONSUM	\$0.00		\$0.00
001.300.2357.1.3.050.600.5	RHS PROF DEVEL LIBRARY	\$0.00		\$189.00
001.300.2357.1.3.052.600.5	PROF DEVEL MATH	\$1,876.40		\$166.00
001.300.2357.1.3.057.600.5	PROF DEVEL HEALTH SCI/PE	\$600.00		\$588.12
001.300.2357.1.3.064.600.5	PROF DEVEL SCIENCE	\$2,101.74		\$1,775.89
001.300.2357.1.3.067.600.5	RHS PROF DEVEL SOCIAL STUDIES	\$0.00		\$2,511.50
001.300.2357.2.3.079.600.5	HS SPED PROF DEV OTHER EXP	\$4,170.00		\$2,705.00
001.300.2410.1.3.020.520.5	TEXTBOOKS ART	\$400.00		\$398.78
001.300.2410.1.3.034.520.5	TEXTBOOKS-ENGLISH	\$3,798.85		\$10,655.09
001.300.2410.1.3.052.520.5	TEXTBOOKS MATH	\$1,098.03		\$98.12
001.300.2410.1.3.064.520.5	TEXTBOOKS SCIENCE	\$3,506.90		\$26,534.50
001.300.2410.1.3.067.520.5	RHS TEXTBOOKS-SOCIAL STUDIES	\$0.00		\$8,008.00
001.300.2415.1.3.050.400.5	CON SERV - LIBRARY	\$0.00		\$0.00
001.300.2415.1.3.050.500.5	SUPPLIES & MATL - LIBRARY	\$354.83		\$99.22
001.300.2415.1.3.050.520.5	NON EXP MATERIAL LIBRARY	\$7,304.29		\$4,137.00
001.300.2420.1.3.020.520.5	NON-EXP MATL ART	\$1,337.08		\$1,279.07
001.300.2420.1.3.027.520.5	NON EXP MATL TECHNOLOGY	\$4,973.68		\$206.70
001.300.2420.1.3.034.520.5	NON EXP MATERIAL ENGLISH	\$0.00		\$64.87

001.300.2420.1.3.036.520.5	NON EXP MATL WORLD LANG.	\$290.64	\$226.33
001.300.2420.1.3.044.520.5	NON EXP MAT HLTH SCI FAM/CONSU	\$1,204.10	\$1,050.06
001.300.2420.1.3.052.520.5	NON EXP MATL MATH	\$835.68	\$1,056.17
001.300.2420.1.3.054.520.5	NON EXP MATL FINE ARTS	\$3,931.93	\$3,975.67
001.300.2420.1.3.057.520.5	NON EXP MAT HEALTH SCI/PE	\$706.42	\$700.87
001.300.2420.1.3.064.520.5	NON EXP MATL SCIENCE	\$8,006.19	\$7,279.21
001.300.2420.1.3.067.520.5	NON EXP MATL SOCIAL STUDIES	\$8,578.52	\$2,567.29
001.300.2420.2.3.099.520.5	HS SPED NON-EXP SUP & MATL	\$2,327.10	\$681.00
001.300.2430.1.3.020.500.5	EXP MATL - ART	\$7,133.81	\$6,986.38
001.300.2430.1.3.027.500.5	EXP MATL - TECHNOLOGY	\$5,073.82	\$4,882.71
001.300.2430.1.3.034.500.5	EXP MATL - ENGLISH	\$1,193.26	\$184.78
001.300.2430.1.3.036.500.5	EXP MATL - WORLD LANGUAGE	\$1,282.46	\$1,128.62
001.300.2430.1.3.044.500.5	EXP MAT HLTH SCI FAM/CONSUMER	\$2,920.11	\$2,761.10
001.300.2430.1.3.051.500.5	STAY PROGRAM ALT ED EXP MAT'L	\$497.32	\$0.00
001.300.2430.1.3.052.500.5	EXP MATL - MATH	\$651.00	\$798.12
001.300.2430.1.3.054.500.5	EXP MATL - FINE ARTS	\$2,051.47	\$2,214.16
001.300.2430.1.3.057.500.5	EXP MATL HEALTH SCI/ PE	\$1,453.93	\$1,441.16
001.300.2430.1.3.064.500.5	EXP MATL - SCIENCE	\$12,760.62	\$12,731.32
001.300.2430.1.3.067.500.5	EXP MATL - SOCIAL STUDIES	\$31.95	\$1,144.55
001.300.2430.2.3.079.500.5	HS SEVRLY HNDCAP PROG SUP & MATL	\$48.78	\$0.00
001.300.2430.2.3.099.500.5	HS SPED EXP SUP & MATL	\$6,210.27	\$1,546.03
001.300.2451.1.3.020.520.5	NON EXP MATL TECH ARTS	\$2,527.90	\$2,644.49
001.300.2451.1.3.027.500.5	EXP MATL TECHNOLOGY	\$2,972.97	\$0.00

001.300.2451.1.3.045.520.5	RHS NON EXP MATL APPLIED TECH	\$0.00	\$401.10
001.300.2451.1.3.054.520.5	NON EXP MATL TECH MUSIC/DRAMA	\$1,418.14	\$1,503.23
001.300.2451.1.3.064.520.5	NON EXP MATL TECH SCIENCE	\$0.00	\$0.00
001.300.2710.1.3.041.100.5	GUIDANCE SAL PROF	\$372,688.91	\$307,280.40
001.300.2710.1.3.041.200.5	RHS GUIDANCE CLER-SAL	\$73,640.02	\$74,945.35
001.300.2710.1.3.041.400.5	CON SERV - GUIDANCE	\$1,775.20	\$3,750.02
001.300.2710.1.3.041.500.5	EXP MATL - GUIDANCE	\$3,232.28	\$2,351.04
001.300.3200.1.3.042.500.5	EXP MATL HEALTH	\$1,101.50	\$1,230.45
001.300.3200.1.3.042.520.5	NON-EXP MATL HEALTH	\$65.70	\$0.00
001.300.3200.1.3.042.600.5	PROF DEVEL HEALTH	\$120.94	\$231.00
001.300.3510.1.3.022.400.5	CON SERV - ATHLETICS	\$40,586.65	\$30,998.95
001.300.3510.1.3.022.470.5	CON SERV. - OFFICIALS	\$284.00	\$1,090.00
001.300.3510.1.3.022.500.5	EXP MATL - ATHLETICS	\$4,340.53	\$3,814.58
001.300.3510.1.3.022.600.5	OT EXP - ATHLETICS	\$1,636.67	\$1,536.11
001.300.3520.1.3.029.140.5	XTRA CURR SAL	\$34,842.50	\$31,518.00
001.300.4110.9.3.099.500.5	CUSTODIAL SUPPLIES & MATERIALS	\$22,197.97	\$22,102.57
001.300.4130.9.3.099.690.5	WATER	\$5,820.90	\$4,821.90
Total Variable Costs		\$5,064,642.14	\$4,795,116.70

Appendix H:

The Impact of Class Size on School Choice

This data represents English classes 2012-2013.

Grade	Choice Students	Total Students	Current English Sections	Avg/ Section	Choice Sections
9	36	169	9	18.78	1.89
10	28	173	9	19.22	1.47
11	23	184	10	18.4	1.28
12	24	166	10	16.6	1.41
Totals:	111	692	38	18.21	6.06

FTE Needed for Choice Students 1.2

Staff Cost for FTE \$78,000

Staffing cost for Choice FTE's for 7 courses \$546,000

In order to serve the six sections needed to accommodate Choice students in grades 9 through 12, the Full Time Equivalent teacher(s) needed is 1.2 as they teach five classes each. The staff cost for 1.2 FTE is \$78,000. As all students take seven classes the staffing cost for School Choice FTE's for 7 courses totals \$546,000.

The impact of class-size is shown in the chart below which designates slightly larger class averages requiring a 1.0 FTE to teach the sections needed to accommodate choice students. The average staff cost for a 1.0 FTE is \$65,000. Again, as all students take seven classes, the staffing cost for School Choice FTE's would be \$455,000.

Grade	Choice Students	Total Students	Fewer Sections	Average Class Size	Choice Sections
9	36	169	8	21.13	1.7
10	28	173	8	21.63	1.29
11	23	184	8	23	1
12	24	166	8	20.75	1.16
Totals:	111	692	32	21.63	5.13

FTE Needed for Choice Students 1.0

Staff Cost for FTE \$65,000

Staffing cost for Choice FTE's for 7 courses \$455,000

This represents a lower cost (\$91,000) with the same number of School Choice students.

This chart is not a detailed analysis. It illustrates the fact that class size is a factor to be considered when evaluating the School Choice issue. This sample, using only figures for the English Department provides an example. It is important to remember that there are several areas of study that students do not take all four years. These assumptions require deeper analysis and data will change from year to year.

AP Class Enrollment and School Choice

Choice Students Enrolled in AP Classes 2012-13					
AP	Calculus AB		2/21	2 Seniors	
AP	Computer Science		2/26	1 Junior	1 Sophomore
AP	Biology		1/18	1 Senior	
AP	Economics		3/37	1 Senior	2 Juniors
AP	Statistics	2 sections	6/49	6 Seniors	
AP	US History	2 sections	6/36	6 Seniors	
AP	Physics C			no choice	
AP	English 12	2 sections	3/28	3 seniors	
AP	Spanish 4	2 sections	3/43	1 Senior	2 Juniors
AP	Spanish 5		1/22	1 Senior	

This chart shows the number of School Choice students enrolled in any given AP Course. For example, 2 of the 21 students enrolled in AP Calculus AB are school choice students.

APPENDIX I: COST OF SPECIAL EDUCATION for CHOICE STUDENTS

In FY 11 12.9% of students at the High School received Special Education Services, and in FY 12 that number was 11.1%.⁸

Reimbursements:

RESIDENT STUDENTS: Circuit Breaker

The state reimburses the District up to 75% of Special Education costs for an individual student if those costs exceed the (FY 13) foundation amount of \$40,500 per year. The foundation amount may be changed annually.

CHOICE STUDENTS: Special Education Increment

⁹<http://profiles.doe.mass.edu/students/classsizebygenderpopulation.aspx?orgcode=06750505&fycode=2013&orgtypecode=6&>

The District is reimbursed for the costs associated with providing special education services for Choice students. This reimbursement is based on the same formula used for determining circuit breaker claims but there is no foundation amount for choice students. HWRSD is reimbursed through Chapter 70 funds charged to the choice student's home district. In FY12, for example, the District had 8 Choice students who received Special Education services ranging from \$35.00 to \$7,152. These claims totaled \$25,690, and were reimbursed to the District by the State via Chapter 70 funds.

Because the District is reimbursed fully for the cost of Special Education Services to Choice students, there is no additional cost for providing them with these services. There is a cost, however, for evaluating them to determine whether or not they require services.

School Year	Choice Student Referrals for Evaluations	Cost to District
2012-2013	7	\$21,000
2011-2012	8	\$24,000
2010-2011	3	\$9,000

The evaluations HWRSD performs are thorough and comprehensive. The Director of Special Services estimates the cost is \$3,000 per evaluation: this considers evaluation time, report writing time, materials and the cost of meeting time.

During the 2012-13 school year, six choice students' families requested evaluation of students who were not previously deemed eligible for special education services. Of the six students, only one was found to be eligible. During the 2011-12 school year, three students who had not previously been deemed eligible for special education were evaluated. The other five students arrived in the district already eligible.

2010-11 School Year breakdown of eligibility is not available.

There is no cost to the parent for the evaluation. The District is required to complete evaluations upon request by a parent.

CHOICE STUDENTS RECEIVING SPECIAL EDUCATION SERVICES

	FY 10	FY11	FY12	FY13
Number of Students	8	9	8	10
\$ of services	\$17,257	\$28,444	\$25,690	\$21,392

⁹ Discussion and private correspondence with Katherine Harris, Director of Student Services

SY 2013-14 Course Offerings

Hamilton-Wenham RHS		Manchester- Essex		Lynnfield HS		Ipswich HS	
678 students		441		625		614	
107 courses offered		122		145		137	
ART							
18		23		14		12	
CP	Digital Photography I (sem)	Art Foundations	CP	Art Exploration (sem)		Intro to Art (sem)	
CP	Digital Photography II (sem)	Drawing	CP	Foundation Drawing		Printmaking (sem)	
CP	Graphic Design 1 (sem)	Painting	CP	Advanced Drawing Intensive		Ceramics (sem)	
CP	Graphic Design 2 (sem)	Portfolio I	H	Basic Drawing Techniques (sem)		Drawing (sem)	
CP	Web Page Design (sem)	Portfolio II	H	Advanced Drawing (sem)		Painting (sem)	
CP	Intro Television Productions (sem)	Studio Art	AP	Visual Design (sem)		Visual Communications (sem)	
CP	Adv Television Productions (sem)	Graphic Design	CP	Portfolio (sem)		Sculptue (sem)	
CP	Experimental Design (sem)	Art & Technology	CP	Intro Photography (sem)		Studio Art (sem)	
CP	Art 1 (sem)	Digital Phtography I	CP	Advanced Photography (sem)		Art Themes (sem)	
CP	Art 2 (sem)	Digital Phtography II	CP	Experimental Photography (sem)		Portfolio (sem)	
CP	Drawing & Painting (sem)	Digital Phtography III	CP	Photography - Indep Study (sem)		Digital Photography I (sem)	
CP	Sculpture (sem)	Photography	H	Intro Computer Design (sem)		Digital Photography II (sem)	
CP	Advanced Sculpture (sem)	Portfolio	H	Portfolio Prep (sem)			
CP	Art Portfolio (sem)	Visual Journalism	H	Advanced Computer Design (sem)			
CP	Experimental Design	Ceramics I	CP				
CP	Critical Film Theory (sem)	Ceramics II	CP				
CP	Social Media Today (sem)	Ceramics III	CP				
CP	Studio Art (sem)	Ceramic Portfolio	H				
		Printmaking	CP				
		Printmaking II	CP				
		Printmaking III	CP				
		Printmaking	CP				
		Portfolio	H				
		Mixed Media	CP				
		Multicultural Art	CP				
BUSINESS EDUCATION		5		12			
		Marketing Essentials	CP	Desktop Publishing (sem)		CP	
		Marketing Essentials	H	Tech for 21st Century (sem)		CP	
		Business Management	CP	Business & Personal Law (sem)		CP	
		Business Management	H	Business & Personal Law (sem)		H	
		Independent Study--DECA	H	Personal Financial Mgmt (sem)		CP	
				Principles of Economics (sem)		CP	
				Marketing (sem)		CP	
				Accounting (sem)		CP	
				AP Economics		AP	
				Computer Science (sem)		CP	
				Computer Science (sem)		H	
COMPUTER SCIENCE/TECH							
1		2					
AP	Computer Science -A	Intro to Comp	CP				

		Programming Computer Science -A	AP				
	DEBATE?SPEECH	1					
		Forensics League	H				
	SOCIAL STUDIES						
	13	15		13		21	
H	World History	World History II	H	Modern World History	H	US History CP L1	CP
CP	World History	World History II	CP	Modern World History	CP	US History CP L2	H
H	US & World History 1	US History I	H	US History I	H	US History I	H
CP	US & World History 1	US History I	CP	US History I	CP	US History II CP L1	CP
H	US & World History 2	US History II	AP	US History	AP	US History II CP L2	CP
CP	US & World History 2	US History II	H	US History II	CP	US History II	H
AP	US History	US History II	CP	Amer Humanities-Research Paper	CP	Modern World History	CP
AP	Economics	Psychology	AP	World Studies	H	Modern World History	H
AP	Psychology	Psychology	H	American Government (sem)	CP	Modern Europe (sem)	CP
CP	Psychology (sem)	US Gov't & Politics	H	Amer Pop Culture of 20th C (sem)	CP	Criminal Justice (sem)	CP
H/CP	World Affairs (sem)	US Gov't & Politics	CP	Intro to Sociology (sem)	CP	Middle Eastern Studies (sem)	CP
H/CP	Contemporary History (sem)	US Gov't & Politics Comparative Gov't & Politics	AP	Intro to Psychology	CP	Facing History & Ourselves (sem)	CP
H/CP	Reel History (sem)	Current Global Issues	AP	Psychology	AP	Phsychology I (sem)	CP
		Current Global Issues	H			Psychology II (sem)	CP
			CP			American Government (sem)	CP
						American Government (sem)	H
						US History	AP
						Community Service (11)	CP
						Famous Figures in History (sem)	CP
						History Goes to the Movies (sem)	CP
						Vietnam War Experience (sem)	CP
	ENGLISH						
	11	11		26		18	
H	Genre Study, Writing, and Lit Analysis	World Lit	H	English 9	CP	English 9 L1	CP
CP	Genre Study, Writing and Lit Practices	World Lit	CP	English 9	SK	English 9 L2	CP
H	Classic & Cultural Literary Analysis	American Lit I	H	English 9	H	English 9	H
CP	Classic & Cultural Literary Studies	American Lit I Language & Composition	CP	English 10	CP	English 10 L1	CP
H	British Literature	American Lit	AP	English 10	SK	English 10 L2	CP
CP	British Literature		H	English 10	H	English 10	H
AP	Advanced Placement	American Lit	CP	English 11-Research Paper	H	English 11-American Lit	CP
H	American Literature	Literature & Composition	AP	American Lit-Research Paper	CP	English 11-American Lit	H
CP	American Literature	Literature of England	H	American Lit-Research Paper	SK	English 12: Lit & Composition	
CP	Creative Writing (sem)	Literature of England	CP	Amer Humanities - Research Paper	CP	Eng 12: Creative Writing: Fiction	CP
CP	Contemporary World Lit (sem)	Journalism (student paper)	H	English Lit & Comp	AP	Eng 12: Creative Writing: Poetry	CP

CP	Pre-Calculus	Pre-calculus	H	Advanced Algebra 2	CP	Algebra II	H
CP	Statistics	Quantitative Reasoning	CP	Math Connections 3 - Algebra 2	CP	Precalculus	CP
AP	Statistics	Reasoning	H	Precalculus	CP	Precalculus	H
A1	Calculus	Calculus	H	Calculus AB	AP	Calculus	H
AP	Calculus AB	Calculus AB	AP	Topics in Advanced Algebra 2	CP	Calculus AB	AP
A1	Applied Topics in Algebra 2	Statistics	AP	Statistics	AP	Computer Programming	H
CP	Trigonometry (sem)			SAT Prep	CP	Computer Science -A	AP
CP	Mathematics of Finance (SEM)					Independent Study - Computer Science	H
CP	Discrete Math (sem)					Art in Mathematics (sem)	CP
CP	Statistics (sem)					Accounting I (sem)	CP
						Statistics	CP
						SAT math prep	CP
						Statistics	AP
						Model Adv Quantitative Reasoning	CP
MUSIC/DRAMA							
11		5		19		18	
CP	Concert Band	Music Theory	CP	Unusual course offerings!		Theatre Arts	CP
H	Harmony	Band	CP	Music Exploratory Intensive		Theatre Arts	H
H	Jazz Band	Indep Study	CP	-Guitar Level 1-4	CP	Technical Theatre	CP
		Jazz Band	CP	-Piano Level 1-4		Technical Theatre	H
CP	Concert Choir	Chorus	CP	Woodwind/Brass/Percussion		Adv Theatre Arts	CP
CP	Electric Performance (sem)			-Jazz Improv Lab		Adv Theatre Arts	H
CP	Theatre 1 (sem)			Music Technology 1-2		Screenwriting (sem)	CP
CP	Theatre 2 - Art of Performance (sem)			Music Exploration		Concert Band	CP/H
CP	Theatre Technology & Design (sem)			Jazz History		Concert Choir	CP/H
CP	Public Speaking: Eff Comm (sem)			Contemp Music History		Orchestra	CP/H
CP	Shakespeare on Film (sem)			Intro to Music Theory		Treble Choir	CP/H
CP	Improv: for Thetre & Life (sem)			Intermediate Music Theory		Jazz Ensemble	H
				Adv Music Theory Analysis		Chamber Orchestra	CP
				Special Study in Music		Symphony Orchestra	H
				Intro to Band		Chamber Singers	H
				Intro to Jazz Band		Jazz Improv (sem)	
				Pioneer Band		Music Theory	
				Concert Choir		Guitar Experience (sem)	
				Chamber Singers			
				Women's Chorus			
SCIENCE							
22		26		21		27	
H	Biology	Physics	CP	Biology	H	Biology L1	CP
CP	Biology	Physics	H	Chemistry	H	Biology L2	CP
AP	Biology	Fndtns Tech & Eng	CP	Biology	CP	Chemistry	CP
H	Chemistry	Biology	CP	Topics in Biology	CP	Biology I	H
CP	Chemistry	Biology	H	Biology MCAS Prep		Biology II	H
AP	Chemistry	Chemistry	CP	Biology	AP	Biology	AP
H	Physics	Chemistry	H	Chemistry	CP	Chemistry L1	CP
CP	Physics	Physics	CP	Topics in Chemistry	CP	Chemistry L2	CP
AP	Physics B	Physics	H	Physics: Mechanics C	AP	Chemistry	H
AP	Physics C	Biology	AP	Physics	H	Biochemistry	CP
CP	Forensics	Environmental Science	AP	Physics	CP	Chemistry	AP
H	Anatomy & Physiology	Physics C	AP	Chemistry	AP	Physics	CP

CP	Anatomy & Physiology	Anatomy & Physiology	CP	Anatomy & Physiology	CP	Physics	H
CP	Astronomy	Physiology	H	Topics in Plant Science	CP	Physics II	H
H	Chemistry/Biochemistry Organic	Authentic Science Research 11-12	H	Anatomy & Physiology	H	Physics	AP
CP	Chemistry/Biochemistry Organic	Authentic Science Research I-11	H	Topics in Marine Science (sem)	CP	Earth and Space Science	CP
CP	CAD (sem)	Authentic Science Research II-12	H	Marine Science (sem)	CP	Marine and Coastal Science	CP
CP	Fabrication Technology	Env Science (sem)	CP/H	Forensic Science (sem)	CP	Anatomy	CP
CP	Manufacturing Technology (sem)	Green Scholars (sem & full year)		Bioethics (sem)	CP	Environmnetal	CP
CP	Modular Technology (sem)	Robotics Design & Eng (sem)	CP	Current Topics in Science (sem)	CP	Science	CP
CP	Robotics Technology (sem)	Robotics Design & Eng (sem)	H	Intro to Astronomy (sem)	CP	Forensic Science & Criminology	CP
CP	Small Gas Engines (sem)	CAD 3/D	CP			Engineering the Future (sem)	CP
		Modelling (sem)	CP			Drafting Design & Tech I	CP
		CAD 3/D				Drafting Design & Tech II	CP
		Modelling (sem)	H			Engineering Technology II	CP
		Ind'I Design & Eng (sem)	CP			Engineering Technology III	CP
		Ind'I Design & Eng (sem)	H				
		Intro Computer Programming (sem)	H			Robotics I (sem)	CP
						Robotics II (sem)	CP
FAMILY/CONSUMER SCIENCE							
5							
CP	Childhood Development (sem)						
CP	Chefs / Nutrition I (sem)						
CP	Chefs / Nutrition II (sem)						
CP	Retail and Design 1 (sem)						
CP	Retail and Design 2 (sem)						
PHYS ED & HEALTH							
	Health & Phys Ed (9)	Phys Ed & Health (9-10)	CP	PE 9	CP	PE/Wellness 9 (sem)	
	Adventure Ed (10)	Adv Phys Ed & Health (11-12)	CP	PE 10	CP	PE/10 Project	
	Competitive Games (.25)			Fitness & Recreation		Adventure (sem)	
	Fitness Training (.25)					PE/Advanced Project	
	Net Games (.25)					Adventure (sem)	
	Adventure Ed II (.25)					Lifetime	
						Sprts/Wellness (sem)	
						Health & Wellness (sem)	
						Fitness & Nutrition for Life (sem)	
						Sports	
						Replacement/PE (sem)	
	Wellness Activities (.25)					PE Teacher Asst (sem)	
	Yoga/Pilates (.25)						

13

16

9

9



HAMILTON-WENHAM
REGIONAL SCHOOL DISTRICT

REVISED

*FY15 Superintendent's Budget Recommendation
School Committee Presentation
January 23, 2013*

Prepared by:

Dr. Michael Harvey, Superintendent of Schools

Jeffrey D. Sands, Assistant Superintendent for Finance & Administration



FY15 Budget

Superintendent's Recommendation (REVISED)

Level Service Budget as presented on 12/19/13

PLUS

an additional \$611,000 to fund Priority Overlays

The NET result is an increase in Total Expenditures of
\$675,630 or 2.3% versus FY14 BUDGET.



FY15 Budget

Recommended: Adjusted Net Target (REVISED)

Total Expenses						
	FY13	FY14 ADJ	FY15 BUD	Difference		
Operating Expense - Gross, before offsets	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ (64,027)	-0.2%	
Expense Offsets	\$ 1,594,898	\$ 1,171,200	\$ 987,200	\$ (184,000)	-15.7%	
General Operating Expenses (after Offsets)	\$ 27,289,188	\$ 27,122,586	\$ 27,242,559	\$ 119,973	0.4%	
PLUS Recommended Priority Overlay (Net of Offset adjustments)	\$ -	\$ -	\$ 427,000	\$ 427,000		
Debt Service Expense	\$ 1,841,232	\$ 1,841,735	\$ 1,970,392	\$ 128,657	7.0%	
TOTAL EXPENDITURES	\$ 29,130,420	\$ 28,964,321	\$ 29,639,951	\$ 675,630	2.3%	
Total Funding Sources						
	FY13	FY 14 ADJ	FY15 BUD	Difference		
Revenues						
Chapter 70-Base Aid (Prelim House 2 Proposal 1/22/14)	\$ 3,253,000	\$ 3,370,416	\$ 3,413,341	\$ 42,925	1.3%	
MSBA Debt Service Reimbursement	\$ 1,132,065	\$ 1,132,065	\$ 1,132,065	\$ -	0.0%	
State Transportation Reimbursement	\$ 251,000	\$ 251,000	\$ 290,000	\$ 39,000	15.5%	
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%	
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%	
Total Revenues	\$ 4,725,065	\$ 4,842,481	\$ 4,924,406	\$ 81,925	1.7%	
Transfers In From Other Funds						
Excess and Deficiency (1)	\$ 1,491,000	\$ 596,000	\$ 1,519,443	\$ 923,443	154.9%	
Total Transfers	\$ 1,491,000	\$ 596,000	\$ 1,519,443	\$ 923,443	154.9%	
Total Funding Sources	\$ 6,216,065	\$ 5,438,481	\$ 6,443,849	\$ 1,005,368	18.5%	
Total Expenditures	\$ 29,130,420	\$ 28,964,321	\$ 29,639,951	\$ 675,630	2.3%	
Less Total Funding Sources	\$ 6,216,065	\$ 5,438,481	\$ 6,443,849	\$ 1,005,368	18.5%	
NET TARGET/ASSESSMENT	\$ 22,914,355	\$ 23,525,840	\$ 23,196,102	\$ (329,738)	-1.4%	

(1) Calculated approx. as either 100% of anticipated Certified E&D or Excess Certified E&D (above 3% Target) plus FY14 Budgeted Healthcare surplus.



FY15 Budget

Recommended: Net Operating Budget (REVISED)

General Fund Operating Expenses						
	FY13	FY14 ADJ	FY15 BUD	Difference		
Operating Expense - Gross, before offests & Overlays	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ (64,027)	-0.2%	
Expense Offsets						
	FY13	FY14 ADJ	FY15 BUD	Difference		
<i>Recurring Offsets</i>						
School Choice	\$ 500,000	\$ 550,000	\$ 550,000	\$ -	0.0%	
KDG Tuition	\$ 190,000	\$ 184,000	\$ -	\$ (184,000)	-100.0%	
Preschool Tuition	\$ 30,000	\$ 30,000	\$ 30,000	\$ -	0.0%	
Special Needs Tuition	\$ 30,200	\$ 30,200	\$ 30,200	\$ -	0.0%	
Facilities Rental	\$ 2,000	\$ 2,000	\$ 2,000	\$ -	0.0%	
Circuit Breaker Offset	\$ 250,000	\$ 375,000	\$ 375,000	\$ -	0.0%	
	\$ 1,002,200	\$ 1,171,200	\$ 987,200	\$ (184,000)	-15.7%	
<i>One-Time Offsets</i>						
Other Revolving Accounts	\$ 592,698	\$ -	\$ -	\$ -	0.0%	
Total Offsets	\$ 1,594,898	\$ 1,171,200	\$ 987,200	\$ (184,000)	-15.7%	
NET OPERATING BUDGET: LEVEL SERVICE	\$ 27,289,188	\$ 27,122,586	\$ 27,242,559	\$ 119,973	0.4%	



FY15 Budget

Scenario Planning: 2 Year Outlook

	FY14 BUD	FY14 FORE	FY15 LS BUD	FY15 BUD	FY16 FORE	FY15B vs FY14F		FY15B vs FY14B		FY16F vs FY15B	
Gross Operating Expenses	\$ 28,293,786	\$ 27,393,786	\$ 28,229,759	\$ 28,656,759	\$ 29,416,759	\$ 1,262,973	4.6%	\$ 362,973	1.3%	\$ 760,000	2.7%
Expense Offsets	\$ 1,171,200	\$ 1,171,200	\$ 1,171,200	\$ 987,200	\$ 987,200	\$ (184,000)	-15.7%	\$ (184,000)	-15.7%	\$ -	0.0%
Net Operating Expenses	\$ 27,122,586	\$ 26,222,586	\$ 27,058,559	\$ 27,669,559	\$ 28,429,559	\$ 1,446,973	5.5%	\$ 546,973	2.0%	\$ 760,000	2.7%
Debt Service Expense	\$ 1,841,735	\$ 1,841,735	\$ 1,970,392	\$ 1,970,392	\$ 1,970,392	\$ 128,657	7.0%	\$ 128,657	7.0%	\$ -	0.0%
TOTAL EXPENDITURES	\$ 28,964,321	\$ 28,064,321	\$ 29,028,951	\$ 29,639,951	\$ 30,399,951	\$ 1,575,630	5.6%	\$ 675,630	2.3%	\$ 760,000	2.6%
Total Funding Sources											
	FY 14 BUD	FY 14 FORE	FY15 BUD			FY15B vs FY14F CHG		FY15 vs FY14 CHG		FY16 vs FY15 CHG	
<i>Revenues</i>											
Chapter 70-Base Aid	\$ 3,370,416	\$ 3,370,416	\$ 3,370,416	\$ 3,413,341	\$ 3,413,341	\$ 42,925	1.3%	\$ 42,925	1.3%	\$ -	0.0%
MSBA Debt Service Reimb	\$ 1,132,065	\$ 1,132,065	\$ 1,132,065	\$ 1,132,065	\$ 1,132,065	\$ -	0.0%	\$ -	0.0%	\$ -	0.0%
State Transportation Reimb	\$ 251,000	\$ 251,000	\$ 290,000	\$ 290,000	\$ 290,000	\$ 39,000	15.5%	\$ 39,000	15.5%	\$ -	0.0%
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%	\$ -	0.0%	\$ -	0.0%
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%	\$ -	0.0%	\$ -	0.0%
Total Revenues	\$ 4,842,481	\$ 4,842,481	\$ 4,881,481	\$ 4,924,406	\$ 4,924,406	\$ 81,925	1.7%	\$ 81,925	1.7%	\$ -	0.0%
<i>Transfers In From Other Funds</i>											
Excess and Deficiency (1)	\$ 596,000	\$ 596,000	\$ 1,500,000	\$ 1,519,443	\$ -	\$ 923,443	154.9%	\$ 923,443	154.9%	\$ (1,519,443)	-100.0%
Total Transfers	\$ 596,000	\$ 596,000	\$ 1,500,000	\$ 1,519,443	\$ -	\$ 923,443	154.9%	\$ 923,443	154.9%	\$ (1,519,443)	-100.0%
Total Funding Sources	\$ 5,438,481	\$ 5,438,481	\$ 6,381,481	\$ 6,443,849	\$ 4,924,406	\$ 1,005,368	18.5%	\$ 1,005,368	18.5%	\$ (1,519,443)	-23.6%
Total Expenditures	\$ 28,964,321	\$ 28,064,321	\$ 29,028,951	\$ 29,639,951	\$ 30,399,951	\$ 1,575,630	5.6%	\$ 675,630	2.3%	\$ 760,000	2.6%
Less Total Funding Sources	\$ 5,438,481	\$ 5,438,481	\$ 6,381,481	\$ 6,443,849	\$ 4,924,406	\$ 1,005,368	18.5%	\$ 1,005,368	18.5%	\$ (1,519,443)	-23.6%
NET TARGET/ASSESSMENT	\$ 23,525,840	\$ 22,625,840	\$ 22,647,470	\$ 23,196,102	\$ 25,475,545	\$ 570,262	2.5%	\$ (329,738)	-1.4%	\$ 2,279,443	9.8%



FY15 Budget

What has been included in the Recommended Priority Overlay figure?

In addition to the Level Service Budget presented on 12/19/13, we are recommending that an additional \$611,000 in Priority Overlay funding be provided for the following initiatives:

- Full Day Kindergarten (\$336,000)
- High School 1 to 1 iPad Implementation (\$75,000)
- Classroom Technology Upgrades (\$100,000)
- Facilities & Maintenance Projects (\$100,000)

Any other Priority Initiatives, including COLA Adjustments, must be funded using existing Budgeted dollars. The Leadership Team is in the process of reprioritizing the remaining Tier 1, 2 and 3 items as well as identifying opportunities within our current operating model to free up the financial resources required.



FY15 Budget Cost Savings Review

Conducting an in-depth review of existing Staff, Programs and Controllable Costs in an effort to identify Cost Savings that could fund Other Priorities in FY15, including:

- School Choice
- MRMS Teaming Model
- 6 – 12 Curriculum & Instruction Model
- Special Education
- Redeployment of existing Staff - Districtwide
- Healthcare Costs
- Contract Negotiations
- Facilities Management (Collins Center Study)
- Stipends - Districtwide



FY15 Budget

Timeline & Next Steps

Completed:

- December 5, 2013: Superintendent's Recommended Budget Presentation
- December 19, 2013: Overlay Budget Presentations
- December 20, 2013: Distribute Preliminary Budget Book to School Committee
- January 6, 2014: Continuation of Budget Overlay Discussions
- January 9, 2014: RHS Class Size Review & Overlay Discussions
- January 9, 2014: School Committee Adopts Tentative FY15 Budget
- January 13, 2014: Mailed Tentative FY15 Budget to Towns
- January 13, 2014: Advertised FY15 Budget Public Hearing for 1/23/14
- January 16, 2014: Continuation of FY15 Budget Targets and Overlay Discussions

Scheduled:

- January 23, 2014: Public Hearing on School Choice
- January 23, 2014: Public Hearing on School Committee FY15 Budget
- January 30, 2014: Continuation of FY15 Budget Targets and Overlay Discussions
- February 6, 2014: Continuation of FY15 Budget Targets and Overlay Discussions
- February 13, 2014: School Committee votes to Adopt FY15 Budget
- April 5, 2014: Hamilton and Wenham Annual Town Meetings

Reduce Tier 1 to \$600K

\$800K from E&D in FY15, \$900K in FY16

Need to fund any FY15 COLA through restructuring

COLA for FY16

\$410,000 step and lane increases annual carry over

Total Expenses FY15- Spread E&D Over FY15 & FY16					
	FY13	FY14 ADJ	FY15 BUD	Difference	
Operating Expense - Gross, before offsets	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ (64,027)	-0.2%
Expense Offsets	\$ 1,594,898	\$ 1,171,200	\$ 987,200	\$ (184,000)	-15.7%
General Operating Expenses (after Offsets)	\$ 27,289,188	\$ 27,122,586	\$ 27,242,559	\$ 119,973	0.4%
PLUS Recommended Tier 1 Priority Overlay	\$ -	\$ -	\$ 427,000	\$ 427,000	
TOTAL EXPENDITURES	\$ 27,289,188	\$ 27,122,586	\$ 27,669,559	\$ 546,973	2.0%

Total Funding Sources FY15- Spread E&D Over FY15 & FY16					
	FY13	FY 14 ADJ	FY15 BUD	Difference	
<i>Revenues</i>					
Chapter 70-Base Aid	\$ 3,253,000	\$ 3,370,416	\$ 3,413,341	\$ 42,925	1.3%
State Transportation Reimbursement	\$ 251,000	\$ 251,000	\$ 290,000	\$ 39,000	15.5%
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%
Total Revenues	\$ 3,593,000	\$ 3,710,416	\$ 3,792,341	\$ 81,925	2.2%
<i>Transfers In From Other Funds</i>					
Excess and Deficiency	\$ 1,491,000	\$ 596,000	\$ 800,000	\$ 204,000	34.2%
Total Transfers	\$ 1,491,000	\$ 596,000	\$ 800,000	\$ 204,000	34.2%
Total Funding Sources	\$ 5,084,000	\$ 4,306,416	\$ 4,592,341	\$ 285,925	6.6%
Total Expenditures	\$ 27,289,188	\$ 27,122,586	\$ 27,669,559	\$ 546,973	2.0%
Less Total Funding Sources	\$ 5,084,000	\$ 4,306,416	\$ 4,592,341	\$ 285,925	6.6%
NET TARGET/ASSESSMENT	\$ 22,205,188	\$ 22,816,170	\$ 23,077,218	\$ 261,048	1.1%

Total Expenses FY16- Spread E&D Over FY15 & FY16							
	FY13	FY14 ADJ	FY15 BUD	FY16 BUD	Difference		
Operating Expense - Gross, before offsets	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ 28,989,759	\$ 760,000		2.7%
Expense Offsets	\$ -	\$ -	\$ 987,200	\$ 987,200	\$ -		0.0%
General Operating Expenses (after Offsets)	\$ 28,884,086	\$ 28,293,786	\$ 27,242,559	\$ 28,002,559	\$ 760,000		2.8%
PLUS Recommended Tier 1 Priority Overlay	\$ -	\$ -	\$ 427,000	\$ 352,000	\$ (75,000)		-17.6%
TOTAL EXPENDITURES	\$ 28,884,086	\$ 28,293,786	\$ 27,669,559	\$ 28,354,559	\$ 685,000		2.5%

Total Funding Sources FY16- Spread E&D Over FY15 & FY16							
	FY13	FY 14 ADJ	FY15 BUD	FY16 Projected	Difference		
<i>Revenues</i>							
Chapter 70-Base Aid	\$ 3,253,000	\$ 3,370,416	\$ 3,413,341	\$ 3,413,341	\$ -	0.0%	
State Transportation Reimbursement	\$ 251,000	\$ 251,000	\$ 290,000	\$ 290,000	\$ -	0.0%	
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%	
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%	
Total Revenues	\$ 3,593,000	\$ 3,710,416	\$ 3,792,341	\$ 3,792,341	\$ -	0.0%	
<i>Transfers In From Other Funds</i>							
Excess and Deficiency	\$ 1,491,000	\$ 596,000	\$ 800,000	\$ 900,000	\$ 100,000	12.5%	
Total Transfers	\$ 1,491,000	\$ 596,000	\$ 800,000	\$ 900,000	\$ 100,000	12.5%	
Total Funding Sources	\$ 5,084,000	\$ 4,306,416	\$ 4,592,341	\$ 4,692,341	\$ 100,000	2.2%	
Total Expenditures	\$ 28,884,086	\$ 28,293,786	\$ 27,669,559	\$ 28,354,559	\$ 685,000	2.5%	
Less Total Funding Sources	\$ 5,084,000	\$ 4,306,416	\$ 4,592,341	\$ 4,692,341	\$ 100,000	2.2%	
NET TARGET/ASSESSMENT	\$ 23,800,086	\$ 23,987,370	\$ 23,077,218	\$ 23,662,218	\$ 585,000	2.5%	

FY16 Budget includes Step, Lane and COLA

Certified E&D for FY14	\$ 1,512,000
Amount committed in FY15	\$ 800,000
Uncommitted E&D Balance	\$ 712,000
Expected overage from FY14 Budget	\$ 900,000
Uncommitted E&D Balance from FY14	\$ 712,000
Total E&D Available for FY16	\$ 1,612,000
Amount Committed to FY16 Budget	\$ 900,000
E&D Balance at end of FY16	\$ 712,000

Reduce Tier 1 to \$600K

Add. \$400K returned in FY14, \$800K E&D in

FY15, \$600K in FY16

COLA for FY16

\$410,000 step and lane increases annual carry over

Need to fund any FY15 COLA through restructuring

Includes Step & Lane and Tuition Increase in FY15 and FY16

Total Expenses FY15- Spread E&D Over FY14, FY15 & FY16					
	FY13	FY14 ADJ	FY15 BUD	Difference	
Operating Expense - Gross, before offsets	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ (64,027)	-0.2%
Expense Offsets	\$ 1,594,898	\$ 1,171,200	\$ 987,200	\$ (184,000)	-15.7%
General Operating Expenses (after Offsets)	\$ 27,289,188	\$ 27,122,586	\$ 27,242,559	\$ 119,973	0.4%
PLUS Recommended Tier 1 Priority Overlay	\$ -	\$ -	\$ 427,000	\$ 427,000	
TOTAL EXPENDITURES	\$ 27,289,188	\$ 27,122,586	\$ 27,669,559	\$ 546,973	2.0%

Total Funding Sources FY15- Spread E&D Over FY14, FY15 & FY16					
	FY13	FY 14 ADJ	FY15 BUD	Difference	
<i>Revenues</i>					
Chapter 70-Base Aid	\$ 3,253,000	\$ 3,370,416	\$ 3,370,416	\$ -	0.0%
State Transportation Reimbursement	\$ 251,000	\$ 251,000	\$ 290,000	\$ 39,000	15.5%
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%
Total Revenues	\$ 3,593,000	\$ 3,710,416	\$ 3,749,416	\$ 39,000	1.1%
<i>Transfers In From Other Funds</i>					
Excess and Deficiency	\$ 1,491,000	\$ 1,000,000	\$ 800,000	\$ (200,000)	-20.0%
Total Transfers	\$ 1,491,000	\$ 1,000,000	\$ 800,000	\$ (200,000)	-20.0%
Total Funding Sources	\$ 5,084,000	\$ 4,710,416	\$ 4,549,416	\$ (161,000)	-3.4%
Total Expenditures	\$ 27,289,188	\$ 27,122,586	\$ 27,669,559	\$ 546,973	2.0%
Less Total Funding Sources	\$ 5,084,000	\$ 4,710,416	\$ 4,549,416	\$ (161,000)	-3.4%
NET TARGET/ASSESSMENT	\$ 22,205,188	\$ 22,412,170	\$ 23,120,143	\$ 707,973	3.2%

Total Expenses FY16-Spread E&D Over FY14, FY15 & FY16							
	FY13	FY14 ADJ	FY15 BUD	FY16 BUD	Difference		
Operating Expense - Gross, before offsets	\$ 28,884,086	\$ 28,293,786	\$ 28,229,759	\$ 28,989,759	\$ 760,000		2.7%
Expense Offsets	\$ -	\$ -	\$ 987,200	\$ 987,000	\$ (200)		0.0%
General Operating Expenses (after Offsets)	\$ 28,884,086	\$ 28,293,786	\$ 27,242,559	\$ 28,002,759	\$ 760,200		2.8%
PLUS Recommended Tier 1 Priority Overlay	\$ -	\$ -	\$ 427,000	\$ 352,000	\$ (75,000)		-17.6%
TOTAL EXPENDITURES	\$ 28,884,086	\$ 28,293,786	\$ 27,669,559	\$ 28,354,759	\$ 685,200		2.5%

Total Funding Sources FY16- Spread E&D Over FY14, FY15 & FY16							
	FY13	FY 14 ADJ	FY15 BUD	FY16 Projected	Difference		
<i>Revenues</i>							
Chapter 70-Base Aid	\$ 3,253,000	\$ 3,370,416	\$ 3,370,416	\$ 3,370,416	\$ -	0.0%	
State Transportation Reimbursement	\$ 251,000	\$ 251,000	\$ 290,000	\$ 290,000	\$ -	0.0%	
Medicaid Reimbursement	\$ 85,000	\$ 85,000	\$ 85,000	\$ 85,000	\$ -	0.0%	
Interest Income	\$ 4,000	\$ 4,000	\$ 4,000	\$ 4,000	\$ -	0.0%	
Total Revenues	\$ 3,593,000	\$ 3,710,416	\$ 3,749,416	\$ 3,749,416	\$ -	0.0%	
<i>Transfers In From Other Funds</i>							
Excess and Deficiency	\$ 1,491,000	\$ 1,000,000	\$ 800,000	\$ 600,000	\$ (200,000)	-25.0%	
Total Transfers	\$ 1,491,000	\$ 1,000,000	\$ 800,000	\$ 600,000	\$ (200,000)	-25.0%	
Total Funding Sources	\$ 5,084,000	\$ 4,710,416	\$ 4,549,416	\$ 4,349,416	\$ (200,000)	-4.4%	
Total Expenditures	\$ 28,884,086	\$ 28,293,786	\$ 27,669,559	\$ 28,354,759	\$ 685,200	2.5%	
Less Total Funding Sources	\$ 5,084,000	\$ 4,710,416	\$ 4,549,416	\$ 4,349,416	\$ (200,000)	-4.4%	
NET TARGET/ASSESSMENT	\$ 23,800,086	\$ 23,583,370	\$ 23,120,143	\$ 24,005,343	\$ 885,200	3.8%	

FY16 Budget includes Step, Lane and COLA

Additional Assessment Reduction in FY14	\$ 400,000
Certified E&D for FY14	\$ 1,500,000
Amount committed in FY15	\$ 800,000
Uncommitted E&D Balance	\$ 700,000
Expected overage from FY14 Budget after FY14	
Assessment Reduction	\$ 500,000
Uncommitted E&D Balance from FY14	\$ 700,000
Total E&D Available for FY16	\$ 1,200,000
Amount Committed to FY16 Budget	\$ 600,000
E&D Balance at End of FY16	\$ 600,000

HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT
WENHAM, MA

EXHIBIT D

Education of Pregnant and/or Parenting Students Policy

I. Policy

The Hamilton-Wenham Regional School District does not discriminate against students who are pregnant and/or parenting they shall have access to the same education, co-curricular, and extracurricular opportunities as all other Hamilton-Wenham students. After giving birth, students are permitted to return to the same academic and extracurricular programs in which they participated before they took the leave.

Pregnant and/or parenting students of compulsory age are required to attend school unless medical reasons indicate the contrary. If the student's physician certifies that the student's medical condition requires that the student receives tutoring at home or in the hospital, the District will provide those services.

II. Policy Review and Revision

This policy and its procedures will be reviewed every two years for compliance with state and federal law. Review and revision of these policies and procedures shall occur as needed, but at least every two years.

III. Legal References

Title IX
M.G.L.c. 76 §5
603 CMR 28.03(3)(c)

Originally Adopted: February 27, 2003

Policy Review: December 1, 2011

Approved: December 1, 2011

Vote: 9-0-0

Policy Review: 1st Reading: January 16, 2014
2nd Reading:
Policy Adopted: Originally February 27, 2003 /
Vote: 9-0-0 /
Chairperson, HWRSD School Committee: Roger Kuebel
(Original Signature on file in the Superintendent's Office)