Foundation Budget Review Commission Testimony - March 9, 2015
Interim Superintendent John McDonough, Boston Public Schools

• Chairwoman Chang-Diaz, Chairwoman Peisch, and members of the Commission, on behalf of Mayor Martin J. Walsh, thank you for allowing me the opportunity to speak tonight and welcome to our Lee School. My name is John McDonough and I am the Interim Superintendent of the Boston Public Schools. I also served as the District’s Chief Financial Officer for 17 years.

• While at its core, the Foundation Budget aims to provide adequate resources for our students, Chapter 70 funding – and state education aid, more broadly - has become a major factor not just in our school budgets, but in the fiscal health of every city and town in the Commonwealth. I applaud this Commission for taking a hard look at this and ask that you consider the following four points:

• **First**, I will echo what many Superintendents at prior hearings have said. The Foundation Budget does not accurately reflect the number of special education students we serve, nor the true cost of special education (both in and out of district), teacher’s salaries, health insurance, or technology.

• The Foundation Budget does not differentiate between high need (and highest cost) versus low need (and lower cost) students with disabilities and English Language Learners. Non-regional/non-vocational transportation reimbursement was originally funded when the Education Reform Act was passed in 1993, but was eliminated in 2003.

• **Second**, as you look to make recommendations regarding the Foundation Budget, please be wary of unintended consequences.

• It is highly likely that if you increase the base rate components of the Foundation Budget, the City of Boston will not only see no additional Chapter 70 aid but would actually receive less net Chapter 70 funding than we are receiving today. This is counterintuitive, but true.

• Looking at FY15 numbers, any adjustments made to the underlying components would have to increase our Foundation Budget by $56.5 million (or nearly $900 per student) for the City of Boston to even qualify for any additional Chapter 70 aid beyond the minimum aid per pupil rate set each year, which we currently receive.
• The foundation budget per pupil rates are one of the three components used in calculating the City of Boston’s charter school tuition assessment. If our foundation budget were to increase by any amount less than $56.5 million, the City of Boston would receive no additional Chapter 70 aid while being required to pay a higher charter school assessment, and thus we would actually have fewer Chapter 70 dollars remaining to directly support the Boston Public Schools.

• I ask that you keep this unintended consequence in mind as you finalize your recommendations this spring and hold the City of Boston and any other community that may be in a similar situation harmless from any adjustments to the Foundation Budget that may inadvertently increase our costs and reduce our net state aid.

• Third, the Chapter 70 formula does not fairly balance Boston’s aggregate wealth versus our school district profile.

• The Boston Public Schools is the largest school district in Massachusetts and one of the top 75 largest districts in the country. We operate 128 schools, serving over 57,000 students. Over 85% of our students are students of color, 78% are low income, and 20% have disabilities. Over 25,000 of our students are English Language Learners who speak 84 different languages.

• The Boston Public Schools is also one of 11 underperforming (Level 4 and 5) school districts in Massachusetts.

• In addition to establishing the Foundation Budget, the Chapter 70 formula determines the relative ability of a municipality to fund this budget, based on property values and aggregate total personal incomes. It sets the target share that each city or town is expected to contribute.

• The City of Boston’s target share is calculated at 82.5% - the maximum percentage that any community can be asked to contribute. This leaves the state’s target share for supporting the Boston Public Schools at 17.5%.

• The average local target share of the other 10 underperforming districts is 28.6%, resulting in an average intended level of state support for these schools at 71.4% - almost the inverse of the local/state split for Boston.
• I say this, not to imply that those communities should be contributing more, but to highlight that Chapter 70 does not fairly balance Boston’s aggregate wealth versus our school district profile. Our main source of state education aid treats the City of Boston as an affluent community, not an urban school district that is responsible for educating a large, diverse, low-income, high-need population of students facing all of the social determinants and challenges that this entails.

• While the State created a system of accountability in 2010 and established tools to help districts turn underperforming schools around, adequate resources have not followed. Over the last 10 years, Boston’s foundation budget has increased by 36% but our Chapter 70 aid has only increased by 5%. This lack of financial support runs counter to the state’s commitment to closing the achievement gap for all of our students.

• Lastly, while I applaud this Commission for taking a hard look at the Foundation Budget, which woefully underestimates the true cost of education today, it is impossible to fix how we finance public education in Massachusetts by looking at the Foundation Budget alone.

• There are no magic bullets to this very complicated system that we have created. A system that includes Chapter 70, special education Circuit Breaker, regional and homeless student transportation assistance, charter tuition and facility assessments and reimbursements, and a myriad of state education grants. Any solution to truly address the equity and adequacy of how we fund public education must look comprehensively at all of these financing mechanisms.

• Thank you again for your commitment to tackling this important issue and for the opportunity to be heard tonight. I’m happy to answer any questions you may have.
TO: Honorable Chairs, Senator Sonia Chang-Diaz, Representative Alice Peisch and esteemed Members of the Foundation Budget Review Commission

FROM: Tom Scott, MASS Executive Director
      Dave Tobin, MASS School Finance

SUBJECT Where do we stand on Chapter 70, and the Foundation Budget Review?

Key Points for your consideration for a June 30, 2015 Report by the Commission

1. Your patient and thoughtful participation in this process is applauded by Massachusetts local school districts, who serve nearly one million students, and their families. We depend upon you and your collective wisdom to restore creditability to the foundation budget as a benchmark that supports the continued improvement of schools. You have a daunting task to meet with a fast approaching obligation to report and recommend your findings.

2. We believe conceptually in the Chapter 70 framework of a Foundation Budget that sets a rational minimum standard of required spending that provides an adequate base to allow for the success of all students. Logical and attainable revenue standards are set to fund that minimum spending. Funding standards require minimum local contributions based on each municipality’s relative fiscal capacity to support their students’ foundation budget are being targeted in a more equitable distribution. Finally, the state is required to fund the remaining share of needed foundation spending. Targeting each of these revenue standards to fund their relative share of foundation is a practical mechanism that provides equity in effort requirements.

3. The flaw so widely recognized is that the foundation budget to which required revenues are targeted is grossly inadequate.
   a. Based on a number of recent studies it is over two billion dollars short of the actual need.
   b. Actual budgeted local appropriations for net school spending are $ 2.3+ billion, or on average 123% above the present foundation budget
   c. We are approaching nearly half (44%) of the municipalities are appropriating greater than 120% of the foundation budget. Ninety Four percent of all municipalities are spending at or above foundation. Local municipalities carry the burden to fund actual needs.

Addressing the correction of the foundation budget’s level of spending:
Given the time restraints, we recommend the commission consider a two-phase approach.

Phase I: Recommendations for Immediate Actions to correct for well-recognized flaws in the foundation budget that would restore a large measure of its integrity, to more adequately provide support for gains in student performance in Massachusetts.

   i. Correct the allowance for health insurance as the highest priority
   ii. Adjust allowances for Special Education
i. **Employee Health/Benefits Allowance:** Restore the integrity and creditability of the foundation budget by correcting the allocations for the cost of employee benefits in the foundation budget that are more than $1.2 billion less than actual expenditures (FY 2014). Implement a seven-year plan to correct this error by increasing the assumption by $200 million per year, to a goal approximate to 75%-80% of actual expenditures at the end of seven years.

ii. **Adjust the Special Education Allowance** Provide a more realistic set of assumptions for the estimated minimum expenses required to support programs for students on individual educational plans in our school. Today the funding allowed in the foundation is a $1 billion shortfall from actual expenses.

   i. Immediately allow a 1/4th of a percent increase in the assumed number of in-district special need students to correct for actual costs.

   ii. Increase the allowance for the out-of-district tuition of special education students by $10 K per student over the next three years.

Massachusetts schools are required by their students’ individual educational plans to employ twice the number of special education staff than is provided for in the foundation budget. By contrast, our schools now employ fewer regular education teachers than provided in the foundation budget. By increasing special education allowances money would become available to restore regular education staffing levels.

**Phase II:** Recommend the funding of an extension of this Commission, or creation of a Blue Ribbon Educational Foundation Commission to conduct an independent study of the foundation budget’s adequacy by an independent provider selected by this commission that broadly represents the Massachusetts business community, legislative leadership, K-12 education leaders, and municipal leaders. The Commission shall complete its study and report its recommendation by October 1, 2017. Funding for this Commission and its study shall be no more than $100,000 appropriated by the legislature and matched by private sector solicitation into a fund. The private sector solicitation shall provide for at least half of the expenditures by the commission.

**Agreement on Continuation of the Grand Bargain:** Since 1993, more improved educational funding came in return for improved educational outcomes for Massachusetts. Massachusetts schools and their students have met the challenges presented in the first two decades of school reform and have complied with higher professional educator standards, higher student assessment and outcomes, all coupled with transparency in our reporting. We have listened and agree to participate in the crafting of limits to use of new funding redirected from the more adequately funded items cited above, as investments by the following initiative to be described in a publicly accountable benchmarked school improvement plans

**The parameters of those individually crafted plans would invest in the following:**

1. Expanded teacher professional development; 2. Hiring staff at levels that improved class sizes to support student performance; 3. Purchase books, technology, and instructional materials; 4. Expanded learning time (day/year/venue); 5. Add subject matter coaches; 6. Wrap-around services that engage the entire community and families in strengthening the social emotional support system for students; 7. Provide common planning time for instructional teams. 8. Provide help for ESL -low-income students.

**Supplementary Data to demonstrate the need for appropriate changes:**
Background: Funding for Employee, retiree, health insurances and benefits

The DESE Report on the Status of the Public Educational Financing System in the State of Massachusetts, July 2013, described the escalation of these costs above the assumption of the Chapter 70 foundation assumptions based on FY10: “Spending on employee benefits exceeded foundation budget assumptions by a staggering 133% ($2,096 per pupil in actual spending versus $899 foundation per pupil.)”

<table>
<thead>
<tr>
<th>Figure 1: FY10 general fund spending compared to foundation budget ($ per pupil)</th>
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</thead>
<tbody>
<tr>
<td><img src="image" alt="Table" /></td>
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</tbody>
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DESE’s report cites “A recent study by Ed Moscovitch, an economist actively involved in developing the foundation budget concept in Massachusetts, found that during the 1990s the rate of increase in district health care costs was relatively small, but that during the 2000s it accounted for one-third of the entire increase in school spending." In FY00, insurance for active and retired employees stood at $563 million, or 7.1 percent of total general fund operating expenditures. In FY10 it climbed to $1.55 billion, or 13.9 percent.” Emphasis added

More recent analysis of actual total spending in FY13, health, insurance and retirement programs now accounts for 15.8% of all spending and as a category of spending ranks second to classroom and specialist Teachers. By contrast, a pitiful 1.5% was spent for professional development that is no longer a required expense for districts. A hopeful sign is that the trend in growth on health spending slowed to 2% from FY11 to FY12, and remained flat from FY 12 to 13 because of new tools available that required district management leaders to engage employees groups in implementing controls on the growth of spending. Most recently, those savings are now replaced by 7% + increases. Insurance and Benefits spending in FY13 grew to $ 2.2 Billion, or 15.8% of all spending.

<table>
<thead>
<tr>
<th>MASSACHUSETTS TOTAL</th>
<th>FY13</th>
<th>Function Rank in Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>444,619,426</td>
<td>3.2%</td>
</tr>
<tr>
<td>Instructional Leadership</td>
<td>810,499,212</td>
<td>5.9%</td>
</tr>
<tr>
<td>Classroom and Specialist Teachers</td>
<td>4,860,317,488</td>
<td>35.3%</td>
</tr>
<tr>
<td>Other Teaching Services</td>
<td>999,861,894</td>
<td>7.3%</td>
</tr>
<tr>
<td>Professional Development</td>
<td>206,237,816</td>
<td>1.5%</td>
</tr>
<tr>
<td>Instructional Materials, Equipment and Technology</td>
<td>376,115,932</td>
<td>2.7%</td>
</tr>
<tr>
<td>Guidance, Counseling and Testing</td>
<td>370,429,331</td>
<td>2.7%</td>
</tr>
<tr>
<td>Pupil Services</td>
<td>1,187,553,408</td>
<td>8.6%</td>
</tr>
<tr>
<td>Operations and Maintenance</td>
<td>978,946,819</td>
<td>7.1%</td>
</tr>
<tr>
<td>Insurance, Retirement Programs and Other</td>
<td>2,173,100,998</td>
<td>15.8%</td>
</tr>
<tr>
<td>Expenditures Outside the District</td>
<td>1,357,083,109</td>
<td>9.5%</td>
</tr>
<tr>
<td>TOTAL EXPENDITURES</td>
<td>13,764,665,433</td>
<td>100.00%</td>
</tr>
</tbody>
</table>

DESE in their July 2013 report made the following recommendation:

"Increase the employee benefits rate. There is broad consensus that the foundation budget rates for employee benefits needs an upward adjustment. Rather than adjusting rates to reflect current actual spending levels, we should consider tying the rates to the state's Group Insurance Commission costs, representative of best practices for cost containment."

MASS’s position coincides with that recommendation; this issue is MASS’s highest priority:
### FY 14 Actual Municipal Appropriations for Chapter 70 Net School Spending

#### FY14 Actual Spending in Excess of Required Net School Spending

<table>
<thead>
<tr>
<th>Actual NSS Effort</th>
<th># Municipalities</th>
<th>% of Total</th>
<th>Cumulative % of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Above 120%</td>
<td>154</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>105-120%</td>
<td>130</td>
<td>37%</td>
<td>81%</td>
</tr>
<tr>
<td>100.5-105%</td>
<td>39</td>
<td>11%</td>
<td>92%</td>
</tr>
<tr>
<td>99.5-100.5%</td>
<td>8</td>
<td>2%</td>
<td>94%</td>
</tr>
<tr>
<td>95-99.5%</td>
<td>16</td>
<td>5%</td>
<td>99%</td>
</tr>
<tr>
<td>Below 95%</td>
<td>4</td>
<td>1%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>351</strong></td>
<td><strong>100%</strong></td>
<td><strong>100%</strong></td>
</tr>
</tbody>
</table>

*FY15 Average Actual NSS is 123% above Foundation*

*FY15 Budgeted NSS is $2.33 Billion above foundation*

Source: DESE School Finance
FY 2016 Foundation Allowance for Each Program and Grade Level

Junior / Middle School allowance of $6,942 per pupil reflect and administrative change in 2007 that shifted money away from this allowance. This allowance is grossly inadequate to the need at these very vulnerable years in the education of students about to enter the ranks of high stakes testing in high schools of our state. This needs to be corrected at least by Phase II.

<table>
<thead>
<tr>
<th>FY16 Foundation Budget Rates</th>
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</thead>
<tbody>
<tr>
<td>Pre-School</td>
</tr>
<tr>
<td>Kindergarten-Half</td>
</tr>
<tr>
<td>Kindergarten-Full</td>
</tr>
<tr>
<td>Elementary</td>
</tr>
<tr>
<td>Junior/Middle</td>
</tr>
<tr>
<td>High School</td>
</tr>
<tr>
<td>Limited English PK</td>
</tr>
<tr>
<td>Limited English K Half Time</td>
</tr>
<tr>
<td>Limited English Full Time</td>
</tr>
<tr>
<td>Vocational</td>
</tr>
<tr>
<td>Special Ed-In School</td>
</tr>
<tr>
<td>Special Ed-Tuitioned Out</td>
</tr>
<tr>
<td>Low Income Elem</td>
</tr>
<tr>
<td>Low Income Secondary</td>
</tr>
</tbody>
</table>

Source: DESE School Finance 3-04-15 PPT on FY15 Chapter 70

Comparison of Shifting Shares of the State Budget between 2000 and 2015

The following attached graphic form a Boston Globe article dated January 8, 2015 illustrates that the funding for Health care is not only a municipal problem, but also a paralleled state issue. The graphic points out that State Spending from 2000 to 2015 has shifted in its actual appropriation

See next page for graphic from Boston Globe

<table>
<thead>
<tr>
<th>State Funding Category</th>
<th>2000 Share of State Spending</th>
<th>2015 Share of State Spending</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health care</td>
<td>21%</td>
<td>38%</td>
</tr>
<tr>
<td>Elementary &amp; Secondary Education</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>Local Government Support</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>
"Baker is bracing to face a budgetary baptism of fire."

Boston Globe article: Thursday 1/08/15, p. A7

The shift in state budget spending is displayed on a chart within an article on the budget challenges awaiting Governor Baker. He must deal with the current year shortfall in revenues, spending increases, and plan for the FY 2016 state budget. The growth of health care costs grew from 21% of total state spending in 2000 to 38% in 2015 (moving the health costs share up 17 point, or 81% higher). Health cost growth has also been a factor for local municipal and school costs.

By contrast, in 2000, the year the state met its seven-year promise of funding the K-12 foundation budget, education had grown to 16% of the state budget. In 2015 that share is now 11% of the state budget, a share loss of 5 points, or -31.25%.

Local government support also fell from 7% of state spending to 4%, a loss of 3...
STATEMENT OF THE MASSACHUSETTS BUSINESS ALLIANCE FOR EDUCATION
to the Foundation Budget Review Commission – March 9, 2015

The Massachusetts Business Alliance for Education (MBAE) is committed to a high quality education system that will prepare all students to engage successfully in a global economy and society. MBAE played a leading role in the Education Reform Act of 1993, including development of the formula to fund our state’s public schools based on actual costs of providing our students with the high quality education needed to meet a consistent, high standard of academic achievement.

The data and testimony you have already heard make it clear that some of the original assumptions made about education costs – particularly regarding inflation, health care costs and special education – are not keeping pace with the realities of what it takes to educate all students for the 21st century. It is also clear, however, that the original assumption that if sufficient state aid was provided based on student need those needs would be met was erroneous too. The amount of funding is only a key to accomplishing educational goals if those resources are used effectively. MABE’s focus today is therefore on the Commission’s charge to consider measures to ensure that resources are effectively utilized and models of efficient and effective resource allocation.

To that end, MBAE urges the Commission to incorporate the following principles into its proposals to ensure that education funding (i) targets the specific needs of students, (ii) encourages the development of innovative systems for improving the achievement of Massachusetts educational priorities, and (iii) requires that recipients of educational funding demonstrate the effectiveness of these investments in achieving those goals.

1. Student-Centered Funding

Funding must be both universal to meet the needs of every student and targeted to support those students with greater challenges, for whatever reason, to achieve the learning standards the state demands. While the foundation budget reflects legislative intent to deliver more funding to needier students, the reality falls short of ensuring that low income students receive the supports intended from those additional resources. Chapter 70 currently allows each school district to allocate its public school budget without regard to the categories used to calculate the foundation budget.

**MBAE recommends that the Commission correct the gap between allocation and expenditure through legislation directing that each school receive at least its own share of the foundation budget based on the characteristics of the students who attend the school and greater authority to determine how that money is spent.**

2. Fund Outcomes Instead of Programs

Last year, MBAE issued a report assessing progress over the past two decades and proposing action for the future based on evidence of what is working around the world.
The New Opportunity to Lead makes a strong case for schools to receive greater authority to determine how appropriation for its students are to be spent to meet state objectives for student learning. This authority is commensurate with the responsibility that each school has to educate their students to meet those specific outcomes.

Without connection to results, our state’s student-based budgeting approach is essential, but insufficient, both to direct resources to students who need them and to drive improvements in education from the bottom up. This improvement must be tied to attainment of the results the state is providing funding to accomplish, as Lawrence has been demonstrating. A February 2015 report from Education Resource Strategies finds that “High-performing schools ensure that learning resources are not locked for any individual student—they’re flexible over time, allowing constant adjustment to each student’s changing needs”.

MBAE recommends that the Commission structure funding to achieve specific outcomes, such as 4th grade reading levels, graduation rates, and similar expectations, rather than tying funds to specific inputs or programs.

3. Demonstrate Value for Investments in Education

All states, including Massachusetts, face the challenge of meeting increasingly complex student needs in an era of scarce resources. In such an environment, we cannot afford to continue funding ineffective programs. We must employ the best methods available to assess the relationship between educational investments and educational outcomes.

MBAE recommends that the Commission identify methods for districts to conduct productivity reviews to analyze spending and its impact on student acquisition of the knowledge and skills required for a successful future, and incentivize districts to employ such reviews to improve the effectiveness of its education spending.

Our recommendations for outcome-focused student-based budgeting and expenditure will not affect other aspects of the foundation budget such as the method of calculating the foundation budget or the amount of state aid for each school district. Although the legislature may decide to update the way the foundation budget is calculated based on the work of the Foundation Budget Review Commission, MBAE’s proposals will work seamlessly with any such revision.

MBAE is committed to the work we started in 1988 and to achieving the goals established in 1993, and pledge our cooperation with your ongoing efforts. The foundation budget must promote high education standards and performance in order to ensure that all students have the opportunity to be prepared for success in college, career, and citizenship.

For more information, please contact:

Linda M. Noonan, Executive Director
Massachusetts Business Alliance for Education
617-737-3122
lnoonan@mbar.org

FOUNDATION BUDGET REVIEW COMMISSION
PUBLIC HEARING
March 9, 2015
Boston, MA

Our changing student population; not all ELLs are the same.

Good Afternoon Madam Chairs:

Senator Chang Diaz, Representative Peisch, and Members of the Chapter 70 Foundation Review Commission:

Today, we, the 25 urban school districts in Massachusetts respectfully submit testimony on behalf of the 293,605 students who attend our urban city schools in Massachusetts.

We thank you for this opportunity to speak with you. The urban superintendents are encouraged by the work of this Commission. We believe deeply, as we know you do, in the vision and work of public education.

In 2014, the Massachusetts Association of School Superintendents’ School Finance Task Force found that “the base foundation budget, established in the early 1990s and largely unmodified since, has become obsolete leading to now being grossly inadequate.” We agree with the MASS Task Force finding that the foundation base is substantially below actual expenses of the college and career ready education mandate. The gap between the base and actual spending is magnified when charged with educating a disproportionate student population who are identified as children of poverty or low-income, immigrant, and urban migrant.

Across our State of Massachusetts the Commission has heard superintendents and district administrators testify to the dramatic change in their student demography over the last five years. Superintendents in rural, suburban, and resort cities and towns attest to the increase in the number of students receiving free and reduced lunch while also serving an increased number of ELL students. This changing student demography is felt most disproportionately in urban centers where children of poverty account for the majority of students attending urban schools; these same students are also predominantly immigrant or first language not English students. In our gateway cities, these students are coming from undeveloped countries, countries of violence, and countries with little to no formal education system. Our students are at-risk before they reach our doorstep; they are in need of intensive intervention and support at the individual school and at the district level.

Our testimony today is premised first, on the need to advocate for an increase in foundation funds, not simply a reallocation and redistribution of existing funds. A reallocation and redistribution will not solve our problems.
Our testimony today, although primarily focused on students who are both ELL and low-income, also recognizes the need for increased funds for all low-income students in our State. Clearly, the low-income differential in the Foundation Budget, more than ever, is not adequate for the work that must be done. As urban superintendents, we are witness to the growing disparity and widening gap between the haves and have-nots. We have within our schools an unprecedented number of families living in extreme poverty, homelessness, hunger, and transiency.

In addition to low-income, we ask the Commission to look closely at our growing English Language Learner (ELL) student population and recognize that not all ELLs are created equal in terms of educational need. ELLs who are both low-income and lacking in English proficiency are the hardest to educate. These are the students at-risk for dropping out, gang involvement, and a life of struggle outside mainstream America.

Currently, The Foundation Budget provides the same amount of supplemental funds for all ELL students across the state no matter the socio-economic status. Supplemental funds are provided for ELL students in grades K-8 at $2000 per student and $650 per student in grades 9-12. Yet, students who are ELL and low-income have greater gaps to close than those who enter our public schools from higher socio-economic backgrounds.

Moreover, the differential between the ELL student and the non-ELL student is greater at the 9-12 grade level than the K-8 grade level. This contradicts research and what we know about immigrant students entering our urban schools at the high school level. ELL students at the upper grades have larger academic content and skills gaps to close. Learning a second language and attaining social and academic language proficiency is harder as a student ages. Nonetheless, our urban ELL students exhibit great resiliency and determination; we find our urban immigrant students may take five or six years to graduate compared to other school districts.

Ultimately, if Massachusetts is to continue to lead the nation in K-12 education, urban school systems will need predictable and sustainable funding streams to expand their systems of teaching and learning for this at-risk student population. These funding streams will enable us to reduce class size so that we may more effectively instruct students in mastering missing content knowledge as well as guide students in attaining proficiency in the English language; to hire social workers to address the social and emotional needs of our students while they are in school because so many of our students do not have access to health care due to lack of documentation; to extend our school day to provide more instructional time; and to secure the materials and resources that reflect the differentiated and individual grade level needs of our students.

The urban superintendents respectfully ask the Commission to advocate for increased funding for these at-risk student populations and propose a weighted variable in the formula that takes into consideration the needs of ELL who are also low-income. We also ask that the differential between ELL and non-ELL students be equalized across grade levels. To fail to advocate and resolve these inequities will leave urban school districts without the financial resources to meet the growing need in this at-risk student population. If not addressed, the future progress of Massachusetts urban schools and this growing student population is in jeopardy.
Respectfully submitted,

Dr. David G. , Maiden
Andrea A. Hedberg
Mary M. Bonigle, Chelsea
Kathleen A. Smith, Brockton
Yer: Merlin New Bedford
Jann: Marlboro, Leominster
Joe M. , Lowell
Melissa J. Boone, Worcester
Steve Russell, Salem
Julie Hackett, Newton
Paula Giungardo
Testimony for Massachusetts Foundation Budget Review Commission

3/9/2015

We are four East Boston High School students who also participate in a after-school at East Boston Ecumenical Community Council.

To begin, please make no mistake: We would like to see some implementation and accountability. Here are my concerns

1. As an English Language learner, I am asking for more support. There should be more ESL resources and more sensitivity towards students like us.

2. More budget should be allocated towards training school faculty with bilingual and cultural competency.

3. We need more extracurricular activities such as art and dance classes, sports, and summer youth jobs.

4. We need more technological and counseling resources. We should not wait a four weeks to speak to an advisor or counselor.

5. Budget must be proactive to look for innovation; you should not base this budget on previous budgets.

6. Look for benchmarks with other budgets in other systems that have been successful.

Thank you for listening.
I'm here because I want the school my students deserve. And I want to share some figures to help you understand how much it costs outside of a school's budget to ensure that students have the school experience they deserve.

My name is Afra Khan, and I teach English language learners in a 2nd grade Sheltered English Immersion class in East Boston. Before this year, I taught for three years in Dorchester.

Every year, when doing my taxes, I go through receipts to add up the amount of money I've had to spend on my classroom. In four years, I have spent $3000 out of pocket—only a third of which I've been able to deduct on my taxes.

You may wonder what kinds of things I bought with those $3000. It included basic supplies that my schools have never been able to provide. Things like pencils. Crayons. Scissors. 2 of the cheapest carpets I could find, just to ensure that my students didn't have to sit on the cold floor.

Things that those $3000 did not include:
A $500 carpet that I was able to purchase with donations from Donors Choose after my original carpets grew so filthy the custodian threw them out. It did not include a $400 teaching easel, also purchased through Donors Choose, that I bought because my
classroom didn’t come with one. It did not include 750 more dollars that I was able to raise through Donors Choose to buy books and blocks to help my students build social skills during indoor recess. This $3000 did not include the clothing that I personally bought for a student who’d just come to the US from the Dominican Republic, and who was being teased because her clothes didn’t fit. It didn’t include the groceries I bought for a family of five that had recently arrived to the US from Honduras, and barely had money for dinner.

Here in Boston, our kids often do not come to school with the resources all children should already have. This is especially true in schools like mine in East Boston, with high populations of newly arrived immigrants, many of whom are fleeing desperate situations in their home countries, and who often need immense academic support to catch up with their peers. When our school budget cannot meet our students’ needs, we teachers are left to pick up the slack.

Of course no teacher should have to find 5000 extra dollars to make sure her students have the basic things they need. But the fact that I have managed to do so does not mean that every teacher can. The fact that as a new teacher, I even had $3000 to spare over the course of four years would have been impossible if I hadn’t had the good fortune of coming from a family that could
afford to put me through college and graduate school without student loans. This kind of fortune is not something that my students are likely to ever experience. And it is not something most teachers are likely to have experienced, either. In my graduate school program, I knew other future teachers who were living off of food stamps. I can guarantee you that these colleagues of mine were unable to supplement their classroom budget with thousands of dollars in their first years as teachers. It pains me to think of the things their classrooms must still lack.

As a district, Boston is struggling to recruit and retain teachers who can genuinely relate to the students and communities we work with. How can teaching be a desirable career for teachers who do not come from privileged backgrounds if teachers need to supplement their school’s budget with thousands of dollars just to adequately do their job? How can teaching be a truly sustainable career for someone with student loans and family responsibilities?

This is about more than buying pencils and carpets. This is an issue of making sure that our schools are equitable places—both within our district and when compared to other districts in our state. This is about giving a fighting chance to students who face more obstacles than most. I am here because I want the future my students deserve.
Written Testimony
MA Foundation Budget Review Commission
March 10, 2015

Delivered By: Liz Salomon, EdM, Project Director, Community-Based Research, Adolescent Trials Network, The Fenway Institute at Fenway Health (lsalomon@fenwayhealth.org)

My name is Liz Salomon and I work at The Fenway Institute at Fenway Health in Boston. As part of my role at the Fenway I am privileged to serve as the Project Director for Connect to Protect (C2P) Boston.

C2P Boston brings together more than 300 community representatives and leaders from more than 80 organizations throughout the City and seeks to “identify, develop and catalyze prevention strategies that will reduce HIV infection rates among young Black men who have sex with men and transgender-identified young people in the City of Boston.” We work “to ensure that these strategies are always deliberate, inclusive and in pursuit of racial justice though partnerships with organizations and individuals committed to our shared values and goals.” Using a racial justice framework, our goal is “to ultimately reduce HIV incidence and prevalence among Black youth and young adults in Boston, ages 12-24, through community mobilization and structural change.”

As we have worked over the past three years to identify what stands in the way of HIV prevention among young Black men who have sex with men and transgender-identified youth in Boston we heard from young people that there is a dire lack of, what they called, “awesome, relatable providers” who can provide them with comprehensive sexual health education and resources in a way that truly addresses their needs. Without condoms and education that are regularly and freely made available through people who they can relate to and trust, our youth are lacking vital information and prevention services that could – and should – be delivered within the context of their daily lives as students in the Boston Public Schools (BPS). This feedback from youth, plus the direct connection we have seen between health equity, healthy youth and improved academic success, brought us to advocate for the passing of the new BPS Wellness Policy that was approved by the Boston School Committee in June of 2013.

The new BPS Wellness Policy includes “comprehensive sexual health education that is LGBTQ-inclusive” and “access to condoms, with appropriate health education and counseling services... from appropriate school staff.” We believe that the funding and staffing of the BPS Health and Wellness Department is essential in this process.

We are grateful for the work of the BPS Health and Wellness Department in beginning the implementation of the Wellness Policy over the past year. Today, we ask you to support the
continued funding of and personnel for the Health and Wellness Department in order to maintain support for health educators in schools, including sexual health education, and to continue getting teachers trained in sexual health education, specifically, in delivering sexual health education in a way that is LGBTQ-inclusive and racially just. The Department also needs to have the resources to continue working collaboratively with Health Services on the training of Condom Availability Teams in discussing condoms, sexual health, and LGBTQ sexualities.

In addition to supporting the current efforts of the Health and Wellness Department, we see much need for increased resources and efforts. We see a pressing need for “awesome and relatable” licensed health education teachers in classrooms, who are also trained and certified in delivering sexual health education, and can do so in a way that is LGBTQ-inclusive, sex-positive, and trauma-informed. Such skilled, licensed educators need to be supported by a strong department that can provide professional development, technical assistance, and curriculum support.

We are thrilled by the work that has begun on the Empowering Teens Through Health (ETTH) grant received from the Centers for Disease Control and Prevention (CDC). This grant supports 20 Boston Public High Schools over the next three years in developing exemplary sexual health education, sexual health services, safe and supportive schools for LGBTQ youth, and sexual health policy. We believe that the work of this grant will greatly improve the sexual health of LGBTQ youth in Boston and represents crucial structural change towards reducing HIV transmission, promoting racial justice and health equity, and closing the achievement gap for racial and sexual minority youth. We urge you to ensure a district-wide commitment to the development and sustainability of the work in the ETTH program. We ask you to ensure funding, personnel, and administrative structures in place to develop the work of ETTH Grant, expand this model beyond the present funding to include all high schools in the district, and begin planning towards the sustainability of this work once the grant cycle is over.

Many thanks for holding this hearing and giving us the opportunity to share our thoughts about the importance of integrating condom availability and truly comprehensive, LGBTQ inclusive sexual health education into the budget the Boston Public Schools. My colleagues from C2P Boston and I welcome the opportunity to continue this conversation with you and look forward to seeing our request considered and, hopefully, implemented in the months to come.
Foundation Budget Review Commission

March 5, 2015

Thank you for this opportunity to provide important information which can help to inform the important decisions that will go into developing an up-to-date and equitable Chapter 70 formula. I have examined the areas which have caused unique challenges to Fitchburg over the years and have summarized those in the bullet points below. Thank you for the many hours you have all dedicated to this important effort.

Sincerely,

[Signature]

André Ravenelle

Costs that have a greater impact on urban districts.

1. Larger percentages of in-district students with disabilities, non-English speaking students with disabilities, and students with more than a single physical and/or psychological disability requiring multiple layers of second-language/native language assessments and support services, nursing and on-site medical attention (catheterizations, feeding tubes, etc.), counseling, crisis intervention, and translation/interpretation staff; increased numbers of students on the Autism spectrum now served through in-district, school-based programs, requiring intensive staffing, physical restraint training, wrap-around therapeutic services and inclusion staffing; increased student out-of-district placements for students with complex and very intensive Special Needs; due to available low-cost housing and/or homelessness-related transiency (approximately 7%-8% of the total school population each year), students moving into the District are increasingly coming in with significant IEPs that we must now meet. These have resulted in Fitchburg’s Special Education costs increasing to 5.3% above the state average. This translates into a $3.2M responsibility for Fitchburg.

2. Retiree Health Costs: is not a foundation budget item, yet included as retirement health benefits as a foundation item. This indirect cost reallocates funds from direct education services to students. In Fitchburg, from FY04 to FY15, Retiree health costs have grown by $1.1 million and from 4% to 5.6% of Fitchburg’s Chapter 70 funds. Continued increases in retiree health care costs will take additional funds from direct education services.

3. Healthcare costs, as a percentage of Ch70, have increased from 15% in FY06 to 18% in FY15. In order to minimize health care costs by amending employee co pays and out of pocket costs, the School Department has reduced staffing by $2.7M over this time period, thus further diverting Ch70 funds from direct services to indirect costs.
4. Unfunded or under-funded mandates including McKinney-Vento Homeless transportation, various DESE requirements such as, but not limited to Bill 222, and hard copy/paper document translation compliance, even when parents communicate that they cannot read in their native spoken language which financially impact urban greater than suburbs because of the societal needs of the stakeholders in the community.

5. Additional cost of Clinical Interventionist professional counseling and case management staff – at minimum 3 - costing well over $75,000 each, to address the volatile, emergency social/emotional student needs resulting from living in poverty (eligibility for free/reduced lunch rates as high as almost 90% in some of our schools) or as a result of the impact of trauma, violence and domestic violence, sexual abuse, self and familial gang involvement, criminal justice/court involvement, parental/familial drug and alcohol abuse, mental illness, homelessness. Schools partner with community agencies, but the community agencies are insufficient or unavailable on-demand when crisis arise, resulting in the only resources available are those that the district can provide in school.

6. Class size are larger than in suburban districts but not fundable in cities where needs are greater but city ability to fund is minimal. Given Fitchburg’s higher than state average investment in Special Education, and investment in staff for social/emotional interventions, Fitchburg is unable to utilize this $3.2 - $3.7M to hire 38 classroom teachers to reduce class size similar to its geographic and suburban peers.

7. While grant amounts diminish, the needs they addressed remain or are growing which creates an un-stable funding mechanism and a continuous cycle of competing demands and dilemma-driven priority setting. Funds need to be taken from other items and initiatives in the budget that are also important and which were never identified as unimportant. Fitchburg’s grants have decreased $1.7M from pre recession (ARRA/Stimulus) levels. Fitchburg took corresponding actions to reduce staffing levels to new grant funding levels, although this reduction then disrupts the positive impact of the grant initiatives and creates a new (or revisits an old) set of challenges.

8. $4.6M in combined school choice and charter school tuitions, increase from $3.1M in 2006. Furthermore, DESE is considering a new charter school based in Fitchburg which may further divert funds away from the public school system.

9. Technology: Aging community infrastructure is inadequate to support the IT needs of 21st Century schools. E-rate funding re-calculation is inadequate to fund short and long-term rebuilding and upgrading. Communities such as Fitchburg, without a robust and strong industrial, business and tax base, cannot contribute funding or raise taxes for these kinds of initiatives, so the financial responsibility falls to the school department. Funding for maintaining contemporary student-use hardware through a regular (3 year) technology hardware replacement cycle is not available. Initial purchases through the school choice account or other “investment” lines (grants, donations) are not predictable/sustainable from year to year. BYOD isn’t realistic when over 70% of the students qualify for free/reduced meals and do not have IPads, tablets or lap-tops and there are no local large businesses that can provide them/donate them in sufficient quantities year after year. Wealthier families provide devices for their children and have Internet access at home. Suburban communities have upgraded infrastructure. Newly built schools include IT resources as part of the construction package.
Dear Ms. Williamson,

I’m writing in regards to today’s Chapter 70 public hearing. Unfortunately, due to illness in my family I do not think I’ll be able to attend in person. However, I very much wanted to speak to inequities that we are seeing in Ashland.

These are difficult times for the cities and towns of Massachusetts, and lawmakers face tough decisions as you work to balance the worthy needs of citizens across the state. However, it is troubling when discussions regarding local aid seem to imply that all cities and towns arrive at this moment facing identical circumstances.

Prior to the recent economic downturn, the legislature was implementing a 5-year plan to remediate the inequities in the Chapter 70 funding formula for communities like Ashland. We in Ashland appreciated this acknowledgement of our difficulties and the concrete steps that were being taken to address them. Unfortunately, this process stopped in fiscal year 2009 when the economy declined. Over the recent years, state funding determinations have again been based on the original Chapter 70 funding formula, rather than the amended Chapter 70 formula referenced above. The work that was done to help communities like Ashland simply evaporated and we are now back where we started from.

To give an indication of the disparity that we face, a summary is provided below for Ashland and neighboring Holliston. Holliston is a town similar to Ashland in many ways except for the staggering inequality in state aid. Like Ashland, Holliston is currently grappling with budget difficulties. This comparison is not intended to diminish the needs that Holliston faces, but rather to expose the extent of inequality that confronts the voters of Ashland. I’ve also attached a spreadsheet that speaks to the difference between the aid that Ashland receives vs. Medway and Grafton, two other towns with similar demographics.

Because of this history of unfair state aid and the suspension of the plan to remediate it, the town of Ashland is in a far worse place than many of our neighbors. Many of the cuts that other communities are just now beginning to make we made several years ago. We do not have computer instruction in our middle school. The business instruction in the high school was cut in 2005. We are down to nearly 1 language remaining in our high school (for FY16 the French program will be reduced to 20%). We have lost MANY teaching and support positions in all our schools and we are losing a significant portion in the coming year again. I’ve attached a document reflecting the personnel cuts alone that Ashland has experienced in the last 10 years. The fees that our families have been paying for sports, after-school activities, and bus transportation over the past two years are among the highest in the state and our textbooks are sadly out of date as funding for replacements is not available. In short, our public school district is struggling.

Attached is a letter that was submitted to our Board of Selectmen and signed by over 600 of our residents. It outlines the concerns regarding our schools. Its notable that our town was unable to meet the request of this letter and the school had to come down another $1M in their budget. Our
superintendent calls the new budget a “band aid” and our Board of Selectmen has approved using stabilization funds – again - to address even this significantly reduced plan. As we seek solutions as a town, we look to your group to closely review the Chapter 70 funding formula to determine how Ashland has slipped through the cracks and take steps to rectify the situation so that Ashland may receive aid in an amount similar to our colleagues.

I hope that you will find a way to assist us during these challenging times. Increasing the special education circuit breaker funding is one way that you can help communities like Ashland cope with the tough financial situation. I also ask that you consider adjusting the inflation assumptions in the Chapter 70 funding for FY16. If the inflation assumption was raised to the accurate 6.75% level, Ashland would receive much-needed additional dollars in state funding. These would be significant ways to assist Ashland. However, any additional monies, no matter how small, would help us out.

Thank you for your consideration.
Sincerely,

Michele Hudak
15 Clark Street
Ashland, MA

According to the DESE preliminary summary:
- Holliston is targeted to receive $7,155,225 in chapter 70 aid.
- Ashland is targeted to receive $5,517,160

The difference is $1,638,065 -- if Ashland had these funds, the significant gap between our available town revenues this would nearly close the gap in our budget deficit and our town would be able to maintain the bare minimum core programs that it now provides

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**From:** siegmann@rcn.com [mailto:siegmann@rcn.com]
**Sent:** Sunday, March 01, 2015 9:51 PM
**To:** LaurieTosti@ashland.k12.ma.us; MarkLarson@ashland.k12.ma.us; KathleenBates@ashland.k12.ma.us; MarciaReni@ashland.k12.ma.us; GinaDonovan@ashland.k12.ma.us; yolanda.greaves@gmail.com; boardofselectmen@ashlandmass.com; dconroy@sassoonyrot.com; Kimo-Ashland TM
**Cc:** Michele Hudak
**Subject:** Letter in Support of Funding Ashland School Budget Request

Dear Members of the Ashland School Committee, Ashland Board of Selectmen, Ashland Finance Committee, and Town Manager Schiavi,

Attached please find a letter from 609 concerned taxpayers and residents of Ashland who are worried about the direction of our schools and our town. We ask that you work together to find the money to fully fund Superintendent Adams’ 2015-2016 original budget request
increase of $2,566,923. Over the last ten years, the school budget has experienced serious reductions, most notably to personnel. Despite those cuts, the Ashland Public Schools have endeavored and succeeded in providing each child a quality education. Throughout these ten years of constant reductions, there has not been any corresponding reduction in enrollment. At this point, the services being provided at Ashland Public Schools have been cut to their bare minimum leaving no programs or services that can be eliminated without directly affecting the quality of the education of our students.

Therefore, we are now at a crossroads. The Ashland Public Schools cannot afford any further cuts. The school budget requested by Superintendent Adams is the minimum necessary to ensure each child learns the fundamental subjects and has the same educational opportunities as children across the state. Failure to fully fund this request will result in devastating cuts to school programs and personnel. These reductions will affect children in every grade at our schools and increase class sizes far beyond what is recommended. This will inevitably reduce rankings of our schools and decrease our MCAS/PARR testing scores (which are already disturbingly low for grades 3-8).

Further, these reductions will not only affect our children, it will affect our town. Property values will decrease as school quality is highly valued by buyers. There will also be a slow drain to town finances as residents relocate to other school districts. These are not merely speculative outcomes. Over the last week, we've communicated with over 600 residents: we have heard of families who chose to leave Ashland in frustration over the never-ending cuts and many who are considering leaving if the 2015-2016 school budget request is not fully funded.

For all of these reasons, we hope you will resolve to make the schools a priority and find the money to fully fund Superintendent's original budget request.

Respectfully,

Michele Hudak and Stephanie Siegmann
Ashland Residents
To: Foundation Budget Review Commission  
From: Lisa Guisbond, Executive Director, Citizens for Public Schools  
March 9, 2015

My name is Lisa Guisbond. I’m the executive director of Citizens for Public Schools and I’m here because I want the schools our communities deserve!

To get those schools, we need less testing, more learning. Over the past 20 years we’ve seen a growing emphasis on test-based accountability. Now we now know that the tests are not only taking time and scarce resources from learning but also DO NOT MEASURE the kind of education that is required by the MA constitution and that the foundation budget is supposed to support.

The court set out broad guidelines regarding the nature of the Commonwealth’s duty to educate. It stated that

“[a]n educated child must possess ‘at least the seven following capabilities: (i) sufficient oral and written communication skills to enable students to function in a complex and rapidly changing civilization; (ii) sufficient knowledge of economic, social, and political systems to enable students to make informed choices; (iii) sufficient understanding of governmental processes to enable the student to understand the issues that affect his or her community, state, and nation; (iv) sufficient self-knowledge and knowledge of his or her mental and physical wellness; (v) sufficient grounding in the arts to enable each student to appreciate his or her cultural and historical heritage; (vi) sufficient training or preparation for advanced training in either academic or vocational fields so as to enable each child to choose and pursue life work intelligently; and (vii) sufficient level of academic or vocational skills to enable public school students to compete favorably with their counterparts in surrounding states, in academics or in the job market.”

Notice that HIGH STAKES TESTING is not one of our Commonwealth’s educational goals. And yet, MEASUREMENT AND TESTING in many schools have become the GOALS of education.
Our high-stakes standardized tests do not measure or promote this kind of learning. As a matter of fact, our high-stakes test narrow and distort learning, especially for children in low-income, under-resourced communities.

As Williams College Professor Susan Engel wrote in the March 1 Boston Globe, she reviewed 300 studies of k-12 academic tests and concluded standardized testing does not predict anything except how a student will do on future standardized tests. So we need to use other ways to make sure that students "possess the seven... capabilities."

CPS supports raising the foundation budget to ensure that we are providing every child with a quality education, but we need to stop putting our valuable resources into high-stakes testing that does nothing to help us deliver a whole child education.
Schools our Communities Deserve

Foundation Budget Review Commission Hearing

Dear Commission Members:

I worked in the Boston Public Schools for over fifteen years, mostly at the high school level. My position called for me to sit on the School Site Council, with a little oversight over budget. But we did get to review the budget each year and sign-off on it. In the thirteen years that I spent at the high school level, each year our hard budget was level funded. There were never enough resources for ELL instruction for our large immigrant population. We never reached our goal of increasing teachers of color, and the class size was mostly 27-30 students per teacher. Urban schools lack in programs in the Arts and many of the buildings have not had major repairs in years. Most of our large funding, during the time I was employed, was soft money. So each year there would be cuts. The only time our hard budget was increased was when we were taken over by the State, and that only lasted four years. **How can we provide an Education for the 21st Century for our children?** Do we want education to meet students' & the communities' educational needs or to be able to help corporations compete in the global economy?
March 9, 2015

Dear members,

Thank you for your efforts in reexamining the Chapter 70 formula. I'm writing to urge consideration of two critical factors to the Ch. 70 formula that have not been fully accounted for since the formula went into effect: special education costs and health care costs. Underrepresenting the actual costs of these factors has hampered schools' ability to provide an adequate education to all students.

Special education costs are on the rise because the number of children with severe needs is increasing. The Massachusetts Budget and Policy Center said special education costs in FY2010 were underfunded by $1 billion. This hurts all students and creates tension between special education students and non-disabled students. Potential solutions to this issue is to raise the cap on assumed special education enrollment, lower the threshold for special education circuit breaker reimbursement from four times the foundation budget to three times, and to include transportation in the special education circuit breaker costs.

Health care costs, too, have risen faster than inflation. The Mass Budget and Policy Center estimates the formula underfunded actual health care costs by $1.1 billion in FY10. Costs, then, are being redirected to health care when they were instead meant for learning. Spending on books fell by more than 50 percent from 2000 to 2007 and spending for teacher training fell by almost 25 percent, according to the Boston Foundation. Having health care costs grow at the same rate as actual health care costs will help schools cover the real cost of this expenditure.

Though this will cost more money, the idea that we can save money by sacrificing the education for the next generation simply does not make sense to me. I believe that Massachusetts' economic prosperity is tied to having an educated workforce. There is a clear and strong correlation between the educational attainment of a state's workforce and median wages in the state. Investing in education will strengthen the overall economy more than anything else the state can do.

Thank you for your work and efforts to provide an adequate education to all students in the state.

Sincerely,

[Signature]

Tom Sannicandro
7th Middlesex
Testimony of Jennifer Davis, Co-Founder and President  
National Center on Time and Learning/Massachusetts 2020  
Foundation Budget Review Commission, Hearing March 9, 2015

Good afternoon Madame Chairs, Senator Chang-Diaz, Representative Peisch and Members of the Foundation Budget Review Commission. Thank you for providing this opportunity to speak with you today about education funding in the Commonwealth.

Massachusetts is one of the wealthiest states in the nation, but has a 14% child poverty rate and an unacceptable achievement gap. While Massachusetts may be an education leader, our future depends on more of our children receiving a quality education that prepares them for a successful future.

Over the last 20 years of education reform we have learned what some of the key interventions are to ensure students in high needs communities receive a high quality education.

More time for learning is one of those key successful strategies.

The call for investing in expanded learning has a long history in Massachusetts policy. The 1993, MA Education Reform Act included an “expanded program allotment” as part of the Chapter 70 Foundation Budget. Funded at $380 per pupil, its purpose was to allow schools to provide “expanded educational services for low-income elementary and middle-school students”.

At that time, the Legislature, with the support of MA Business Alliance for Education, which had called for expanding learning time for low-income students in their 1991 report “Every Child A Winner”, clearly demonstrated support for more time for our highest needs students. While the policy promise of the “expanded program allotment” did not come to fruition and in 2007 the budget consolidated the “expanded program allotment” into the low-income allocation, the Legislature has invested in expanded learning time over the past 10 years through a targeted grant program (The Massachusetts Expanded Learning Initiative).

The ELT Initiative has not only resulted in strong educational outcomes and broader educational experiences for thousands of our most at-risk students, but also provided many lessons learned and best practices that can be shared with the expanded-time schools that will follow.
• Today there are 136 district and charter schools* with more time across the Commonwealth. We have found that: Schools that have expanded learning time are twice as likely to be high-growth in math and two-and-a-half times as likely to be high growth in ELA – as compared to schools serving low income students with traditional schedules.
• All K-8 schools in our fastest improving urban district—Lawrence—are expanded-time schools.
• All high-performing charter schools have expanded learning time; some offer as much as 60% more learning time
• Mayor Marty Walsh and BTU President Richard Stutman have come to an agreement for all of the Boston K-8 schools to expand time over the next three years

Beyond increases in test scores, expanded learning time provides schools with time to support social-emotional development, expose students to the arts and music, increase opportunities for physical education, and 21st century skill building, science projects, robotics, project-based learning and, importantly, more time for teachers to collaborate and learn together.

The 136 schools I mentioned are funded through a mix of resources, some unreliable and unsustainable. We know what works and schools with more time—used well—work. If we believe as a state that students in high-poverty schools need and deserve the opportunities that expanding learning time provides, then it is time to create educational parity for all the Commonwealth’s students. I urge this Commission to recommend that the intent of the Expanded Program Allotment finally be enacted so that our high needs children have a chance at a successful future!

My staff will be submitting written testimony with more details and I’m happy to answer questions.

* Reference Types of 136 ELT Schools

• MA ELT Initiative – 22 schools (16% of total)
• Other district schools (e.g: pilot, turnaround, etc.) – 48 schools (35% of total)
• Charter Schools – 66 schools (49% of total)
Testimony regarding the inclusion of school libraries in Chapter 70

As Chapter 70 is reviewed, The Massachusetts School Library Association (MSLA) asks that you recommend the inclusion of professionally-staffed and well-supported school library programs for all students in the Commonwealth of Massachusetts.

School libraries currently have no standing within the Department of Elementary and Secondary Education and are not mentioned explicitly in Chapter 70. Consequently, school libraries often get hit hard when state aid or local aid is reduced. In many communities professional, certified library teachers have been replaced with unqualified teacher’s aides or parent volunteers due to diminished budgets. MSLA believes this practice violates union rules about replacing teachers with non-certified staff, yet we hear that it happens routinely. While no formal records are kept, MSLA is concerned that this lack of support within Chapter 70 has led to a serious lack of equity of access to library resources for students in the Commonwealth. MSLA is also aware that there is a diminishing pool of students seeking library teacher certification in large part due to the precarious nature of these jobs.

The Foundation Budget Review Commission is charged with reviewing the programs and services necessary to prepare students to achieve passing scores on the state assessment system. Close to two dozen studies conducted across the United States have consistently indicated that strong school library programs are closely tied to student achievement (1). For example, Pennsylvania recently conducted a study that demonstrates a clear link between professionally-staffed and well-supported school library programs and better scores on that state’s assessment tool (2).

The Commission is also asked to review measures that ensure resources are effectively utilized, and to find models of efficient and effective resource allocation. School library programs provide established, effective and efficient means for sharing materials within a school. Professionally-staffed and well-supported library programs ensure that high quality print and digital resources are equitably provided to students and staff. Librarians are well-positioned to educate faculty and students about the ever-expanding world of information, including electronic databases, e-books, school-based software programs, and other print and online resources. Librarians are experts in helping students navigate the digital world. They are at the forefront of teaching digital literacy, safety and responsibility. Librarians are also leading the way in developing collections of materials that support the new common core curriculum standards. Librarians are trained to locate high quality informational texts, know the curriculum, and understand how to provide differentiated materials to teachers to support all students—from those who are advanced, to students who are English language learners, or who receive special education services.

In July, the state legislature passed a bill that formed a commission to evaluate the status of school library programs in Massachusetts (3). The work of this commission is now underway. This commission plans to assess the staffing, materials, and hours of library programs in public schools across Massachusetts, and then present recommendations to the Board of Elementary and Secondary Education. We are pleased that this work parallels the work of your commission. It is clear that both commissions are charged with improving educational opportunities for Massachusetts students.

In summary, we urge you to include “professionally-staffed and well-supported school libraries” in Chapter 70 because:

- Without strong support from the DESE, school libraries fall victim to budget cuts.
• Lack of support within Chapter 70 has resulted in a serious lack of equity to library resources for students in the Commonwealth.
• Inadequate funding can lead to the replacement of professional, certified library teachers with unqualified teacher’s aides or parent volunteers.
• Studies show that well-funded, strong school library programs are closely tied to student achievement.
• School libraries provide an established, efficient and effective way to share resources within our schools.
• School libraries support the Common Core.

Respectfully submitted,
Judi Paradis
President


3) An Act Resolve creating a special commission on school library services in the Commonwealth, Bill S1906. https://malegislature.gov/Bills/188/Senate/S1906/
Hi my name is Luis Navarro
I am a junior at the Henderson School K – 12 Inclusion School that means I go to classes with people who have disabilities. It’s a place WE all learn together.

I’m also a Youth Organizer and with the Boston-area Youth Organizing Project (BYOP) and (YOUNG) Youth Organizers United for the Now Generation WE ARE HERE TODAY with the Boston Education Justice Alliance. One of the issues I would like to bring your attention to is low funding in our schools and how it affects us.

Let’s start with breakfast & lunch. We do not have healthy, not enough options and not good tasting food at schools for us to eat. We stay hungry all day. How do you expect a student to give 100% in classes, if don’t get what they need. More funding could give students better and healthy food choices, which would lead to more energy so we could focus, learn and grow.

Another thing that I would like to address outdated and/or lack of school supplies. In school like mine having the right supplies make a difference for a school like mine. For instance we have student that are partially blind and we don’t have the proper materials or supplies it hurts their ability to learn. Things like magnifying glasses, books, calculators are school supplies that all students need and should have. Along these same lines BPS computers are totally outdated we are still using Window 98. Why does my phone is a better computer than the ones provided at school. How are we supposed to be prepared for the future with outdated education supplies, textbooks and materials?

I would like to end with Education is the Key to the future. Don’t lock us out or be the lock to the Schools we all deserve.
Hi My Name is Gerali Mayeo Pena. I am a senior at Dorchester Academy
I am also a part of BYOP and BEJA

Today I want to talk about the DOMINO EFFECT
Because of the lack of resources DA has become underfunded and neglected institution. I believe that the lack of resources have triggered the closing of our school.

I’d like you to take a walk with me and my school hallway
1st everyday is negativity - everyone is struggling: students, teachers, and other school staff
Students receiving non nutritious breakfast often times with expired milk
Going through metal detectors
Imagine 400 student sharing 1 guidance counselor, person of support or not enough money for senior prom
When I walk into my classroom we have to share books because there are not enough. Teachers are not able to teach to their full potential
Lack of resources affected our overall performance in standardized testing scoring lower than majority of school inside the district.
We do not receive enough funding then were judged based on our performance and that caused our closing, is that Contradictory
After four years of going thru this I don’t want anyone else inside my family, inside my nation on this earth to suffer the consequences of not receiving enough money for one of their essential right. EDUCATION

Therefore I believe that the schools I deserve, the schools your children and everyone deserves, should have enough resources, a positive environment and enough support. Remember your not investing in just a building; you are investing in our future. Thank you for listening and have a good night.
SOME RESOURCE NEEDS IN THE BPS

The following information was gathered this week by contacting parents, teachers and staff at a variety of schools in Boston to find out what their most glaring resources needs are currently. This is by no means an exhaustive list, but does offer examples of current pressing needs.

1. More and better qualified English Language Learner teachers who are also Bi-Lingual. In some schools there are only one or two effective ELL teachers carrying a huge load on their shoulders, where there are many ELL students whose needs go virtually unmet.

2. More teaching assistants and staff to assist with students who need additional support, and also more teachers that reflect the racial/cultural backgrounds of the students they are teaching. There are very few teachers who reflect the backgrounds and have experienced the issues confronting students in the system.

3. More classes and extra-curricular activities in the arts, music, theater, dance, etc, phys. ed & sports, youth leadership, etc. Compared to suburban students, urban students have the bare minimum of after-school growth opportunities.

4. More supports for families and young people such as health, dental, eye & hearing services; counseling, translation, etc.

5. More funding for basic supplies, clothing, & technology -- many teachers constantly pay out of their own salaries for paper, notebooks, books & reading materials, pens, pencils, and even coats, jackets, sweaters, boots, for homeless students or those whose families cannot afford the basics necessary to learn. Some actually pay for technology, such as used computers, printers, and science equipment, such as microscopes that work, even food and awards to celebrate student accomplishments, etc.

6. Need to Restore Parent Coordinators and Family & Community Engagement Coordinators to create the all-important linkages between school and home, support struggling students, help provide a space for parent voice and involvement, and increased communications between school and families, etc.
Foundation Budget Review Testimony

Good evening. My name is John Lerner. My daughter is a second grader at the Ellis Mendell School in Roxbury. I'm here today to testify before the commission because I want the schools my community deserves.

I'd like to thank you for holding these public hearings concerning the review of the foundation budget. It's critical funding that, at one time, Boston Public Schools relied upon to provide our kids with a good education.

I say “at one time” because the state doesn't really contribute anything to Boston Public Schools anymore. Next year our state aid is projected to be only about 8% of our BPS school budget. That 8% is down from 30% we received just a few years ago, in 2003.

The BPS budget has not decreased since 2003. As a matter of fact our budget, what we need to spend to provide an education to our children, has gone up by about 50%. As costs have increased, health care, salaries, benefits, transportation, the net state aid we receive has dropped by 62%, from $200 million in 2003, to a projected $76 million in FY16 (assuming our districts aid stays at the $200 million level that it has for the last thirteen years). I say net state aid of $76 million because charter schools will siphoning off $124 million of that $200 million next year.

If state aid had remained at 30%, not 8%, of our budget - each kid in BPS would receive $5,250 in aid next year. As it stands, they will receive $1,400.

Sadly, it appears that the city of Boston, which currently spends about 50% of it's own budget on BPS, can no longer provide the extra money to make up for this state aid drop of 62%. The city, as does the state, has other obligations: the police department, fire department, snow removal, but the city doesn't have the ability to raise taxes, and what we need is more revenue.

I'm hearing that for the state to make the foundation budget have comparable funding to 1993 levels, the state will need to provide an additional $2.1 billion dollars annually. That sounds about right. My rent when I moved to Boston in 1985 was $500 a month, now it's $2,800. My costs have gone up, and I have been able to compensate by generating more revenue for myself.
The state also needs to compensate by generating more revenue. For education purposes, about $2.1 billion in new revenue. At a state level, may I suggest taxing the rich, or at least get them to pay their fair share. A graduated income tax would be a good idea. I saw a graph recently showing that the middle class in Massachusetts pay a higher percentage of their income in taxes. I assume that would be combined taxes, not just the flat income tax we have. This never seems fair to me and I doubt it does to you.

On a city level, Boston could use an override or a repeal of proposition 2.5. Possibly for property valued at over $1 million dollars? That might be a fair threshold, a starting point to consider.

Boston also has 50% of it's real-estate value occupied by nonprofits. These nonprofits sometimes pay nothing towards funding our schools. We do have a voluntary program called "Payment in Lieu of Taxes" (PILOT) but huge institutions, like Northeastern University, contributed nothing last year. They were finally shamed into throwing $150/$200 (?) thousand to the city. They actually said we didn't deserve more - but they still enjoy all the services the city provides for them.

The bottom line here is that we need more money. The state needs more money, the city of Boston needs more money, and our schools need more money. We need more revenue, on all levels, but our first priority has to be our children and their education. Please find the courage to do what's necessary to fully fund our schools. Find a way to generate an additional $2.1 billion and bring the foundation budget back up to 1993 funding levels.

Thank you for the opportunity to testify before you today.

John F. Lerner
92 West Walnut Park
Roxbury, MA 02119
Foundation Budget Review Commission

Submitted Testimony: Meghan Doran, BPS parent

Dear Members of the Commission,

I thank you for the opportunity to submit this written testimony to the Foundation Budget Review Commission. I write to you today as a Boston Public Schools parent. My daughter is in K-1 at the Mattahunt School in Mattapan, so we are just in the beginning of our journey through the system. At the same time, I am a Boston Public Schools graduate and the daughter of a retired BPS teacher. I stand with the Boston Educational Justice Alliance and speak from these multiple vantage points today to say that we need the schools our communities deserve—something that is impossible to achieve at the current level of funding.

Let me begin by telling you a little bit about our school community. The Mattahunt school serves largely low-income students of color. We also have a significant number of students from homeless families—around 60, which is nearly 10% of our student population. Research is clear that disadvantaged students need a wealth of supports to succeed in school. Though I truly believe the Mattahunt principal is striving to provide these supports, she struggles to do so without adequate funding. The Mattahunt is currently in turnaround status—extra funds have slowed for an extra 30 minutes in the school day, teacher development, and frequent achievement net testing to assess and monitor student development. Nonetheless, my daughter and her classmates deserve so much more—they need additional supports to not just meet minimum standards but to thrive.

This year parents on our family council have been trying to figure out how to make the Mattahunt library operative again. Unlike many other schools, the Mattahunt is fortunate to have a beautiful and inspiring space dedicated to a library (see attached pictures.) Without the funds for a dedicated librarian, however, the library sees little use—its books are now disorganized and out-of-date, inaccessible to students. As a parent, I don’t see the library as a luxury, but as a touchstone to a strong educational experience—one which privileged students take for granted. Libraries are centers for literacy which are students so badly need—places not to simply learn skills but to be inspired by reading which they will need to carry them forward in life. Furthermore, 21st century school libraries act as technological hubs for schools—providing students with the computer literacy skills they need to succeed. Do Mattahunt students not deserve an education which both inspires and prepares them for the future? Mattahunt parents believe so. We have looked into fundraising to restore our library but without a dedicated librarian we are ineligible for most grants. We have looked at the budget but cannot possibly figure out how to make cuts in the academic supports our students so badly need. The library is simply one need among many at our school. We simply do not receive enough funding to meet these needs.

You will hear through testimony the many ways the foundation budget is outdated and inadequate and how it can be improved. I am writing to give you one individual’s account of how the current budgeting process is failing our students. My daughter and her classmates deserve a place to explore books and technology, to learn skills and to become inspired. A stronger foundation budget for the 21st century is
an important first step in providing my child, the Mattahunt school community, and all of our students with the schools they truly deserve.

Thank you for your consideration,

Meghan Doran
m.doran@neu.edu
617-980-2317
Schools our Communities Deserve

Foundation Budget Review Commission Hearing

Submitted by Sandra McIntosh

Dear Commission Members:

I worked in the Boston Public Schools for over fifteen years, mostly at the high school level. My position called for me to sit on the School Site Council, with a little oversight over budget. But we did get to review the budget each year and sign-off on it. In the thirteen years that I spent at the high school level, each year our hard budget was level funded. There were never enough resources for ELL instruction for our large immigrant population. We never reached our goal of increasing teachers of color, and the class size was mostly 27-30 students per teacher. Urban schools lack in programs in the Arts and many of the buildings have not had major repairs in years. Most of our large funding, during the time I was employed, was soft money. So each year there would be cuts. The only time our hard budget was increased was when we were taken over by the State, and that only lasted four years. How can we provide an Education for the 21st Century for our children? Do we want education to meet students' & the communities' educational needs or to be able to help corporations compete in the global economy?
Impact of Massachusetts’ foundation budget formula in Gateway Cities
March 9th, 2015

The intent of the 1993 Education Reform act was to provide appropriate per pupil spending, especially in districts with more disadvantaged students. Unfortunately these efforts have been eroded over time. Suburbs are spending more per pupil while Gateway City school districts are forced to make difficult budgetary tradeoffs. Not only are Gateway Cities spending less on textbooks and materials than they did eight years ago, they are unable to recruit and retain talented educators because they cannot offer comparable salaries than suburban districts. In order to fulfill the original intent of the 1993 Education Reform Act, the Commonwealth should increase the foundation budget formula to provide higher per pupil funding for low income students and English language learners in order for Gateway Cities to provide an adequate education.

How has per pupil spending in Gateway Cities changed compared to surrounding communities?
Urban school district budgets are determined by the Massachusetts foundation budget formula. Gateway City school districts rarely spend above the foundation budget level. Suburban districts often spend above the foundation budget. Over time urban school district spending has not kept up with the increases in per pupil spending compared to suburban districts.

Average per Pupil Spending by Region

<table>
<thead>
<tr>
<th>Northeast Region</th>
<th>FY2000</th>
<th>FY2015</th>
<th>% change</th>
<th>% poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lawrence</td>
<td>$7,390</td>
<td>$12,088</td>
<td>64%</td>
<td>92%</td>
</tr>
<tr>
<td>Andover</td>
<td>$7,273</td>
<td>$13,967</td>
<td>92%</td>
<td>6%</td>
</tr>
<tr>
<td>Tewksbury</td>
<td>$6,373</td>
<td>$12,755</td>
<td>100%</td>
<td>17%</td>
</tr>
<tr>
<td>Reading</td>
<td>$6,653</td>
<td>$11,306</td>
<td>70%</td>
<td>7%</td>
</tr>
<tr>
<td>Newburyport</td>
<td>$7,992</td>
<td>$13,215</td>
<td>65%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Southeast Region</th>
<th>FY2000</th>
<th>FY2015</th>
<th>% change</th>
<th>% poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall River</td>
<td>$7,104</td>
<td>$11,428</td>
<td>61%</td>
<td>78%</td>
</tr>
<tr>
<td>New Bedford</td>
<td>$7,154</td>
<td>$11,147</td>
<td>56%</td>
<td>76%</td>
</tr>
<tr>
<td>Somerset</td>
<td>$7,240</td>
<td>$12,566</td>
<td>74%</td>
<td>18%</td>
</tr>
<tr>
<td>Plymouth</td>
<td>$7,091</td>
<td>$12,794</td>
<td>80%</td>
<td>31%</td>
</tr>
<tr>
<td>Falmouth</td>
<td>$6,805</td>
<td>$14,297</td>
<td>110%</td>
<td>29%</td>
</tr>
<tr>
<td>Wrentham</td>
<td>$6,503</td>
<td>$11,442</td>
<td>76%</td>
<td>9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>West Region</th>
<th>FY2000</th>
<th>FY2015</th>
<th>% change</th>
<th>% poverty</th>
</tr>
</thead>
<tbody>
<tr>
<td>Springfield</td>
<td>$7,721</td>
<td>$11,751</td>
<td>52%</td>
<td>87%</td>
</tr>
<tr>
<td>Holyoke</td>
<td>$8,414</td>
<td>$12,283</td>
<td>46%</td>
<td>85%</td>
</tr>
<tr>
<td>Amherst</td>
<td>$9,051</td>
<td>$19,299</td>
<td>113%</td>
<td>38%</td>
</tr>
<tr>
<td>South Hadley</td>
<td>$6,566</td>
<td>$12,586</td>
<td>92%</td>
<td>32%</td>
</tr>
<tr>
<td>Longmeadow</td>
<td>$7,292</td>
<td>$13,416</td>
<td>84%</td>
<td>6%</td>
</tr>
</tbody>
</table>

Over 15 years, average per pupil spending in suburbs caught up to, if not surpassed, neighboring Gateway Cities.
What budgetary tradeoffs have Gateway Cities made?
The foundation budget was designed by superintendents and an economist to ensure that every school district had appropriate class sizes, student support, materials and technology. Yet the foundation budget has not kept up with the growing costs of nondiscretionary spending, including retirement, health insurance, utilities and transportation. This has forced Gateway City school districts to make tradeoffs in textbooks, supplies and classroom teachers.

From FY2006 to FY2014 Lawrence Public Schools spending increased by 41%, yet retirement contributions increased by 60% ($2M), utilities increased by 93% ($1.5M) and student transportation increased by 91% ($2.7M). In order to meet these rising costs, Lawrence now spends less on textbooks (-42%), supplies (-27%) and instructional technology (-17%) than it did in FY2006.

New Bedford Public Schools spending increased by 14% during this time period, but the majority of the increase went to out of district students. Out of district spending (includes students in special education programs and charter schools) increased by 123% ($6.3M) during this time period. As a consequence, New Bedford now spends 58% less on textbooks and 52% less on instructional technology than it did in FY2006.

Fall River Public Schools had a 13% increase in their appropriation but now spends 6% less on classrooms teachers than FY2006 due to a 95% increase in retirement, 50% increase in transportation and 20% increase in health insurance.

The budget of the Holyoke Public Schools increased by $2.6M (3%) over eight years. This increase was completely consumed by increases in health insurance ($2.7M) and made worse by $1.5M increase in student transportation (51%). In order to absorb these costs, Holyoke now spends less than half of what it did in FY2006 on building maintenance, 11% less on classroom teachers and guidance counselors and 96% less on instructional technology and textbooks.

Springfield Public Schools had their budget increase by 37%, but increases in retirement (106%), health insurance (64%) and transportation (44%) forced the district to spent 71% less on textbooks, 62% on building maintenance and 19% less on psychological services.
General Fund budget and select increases and reductions from FY2006 to FY2014

Lawrence Public Schools

<table>
<thead>
<tr>
<th></th>
<th>FY2006</th>
<th>FY2014</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$128,760,646</td>
<td>$181,734,263</td>
<td>$52,973,617</td>
<td>41%</td>
</tr>
</tbody>
</table>

Required Cost Increases

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>$2,058,834</td>
<td>60%</td>
</tr>
<tr>
<td>Utilities</td>
<td>$1,508,124</td>
<td>93%</td>
</tr>
<tr>
<td>Transportation</td>
<td>$2,661,827</td>
<td>91%</td>
</tr>
</tbody>
</table>

Budgetary Tradeoffs

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Textbooks</td>
<td>($413,718)</td>
<td>-42%</td>
</tr>
<tr>
<td>Supplies</td>
<td>($738,876)</td>
<td>-27%</td>
</tr>
<tr>
<td>Instructional Technology</td>
<td>($167,920)</td>
<td>-17%</td>
</tr>
</tbody>
</table>

New Bedford Public Schools

<table>
<thead>
<tr>
<th></th>
<th>FY2006</th>
<th>FY2014</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$131,822,720</td>
<td>$150,021,309</td>
<td>$18,198,589</td>
<td>14%</td>
</tr>
</tbody>
</table>

Required Cost Increases

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Out of district</td>
<td>$6,392,541</td>
<td>123%</td>
</tr>
<tr>
<td>Health insurance</td>
<td>$6,018,190</td>
<td>33%</td>
</tr>
</tbody>
</table>

Budgetary Tradeoffs

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Textbooks</td>
<td>($532,160)</td>
<td>-58%</td>
</tr>
<tr>
<td>Instructional Technology</td>
<td>($200,145)</td>
<td>-52%</td>
</tr>
</tbody>
</table>

Fall River Public Schools

<table>
<thead>
<tr>
<th></th>
<th>FY2006</th>
<th>FY2014</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$112,953,084</td>
<td>$127,839,725</td>
<td>$14,886,641</td>
<td>13%</td>
</tr>
</tbody>
</table>

Required Cost Increases

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>$2,477,100</td>
<td>95%</td>
</tr>
<tr>
<td>Transportation</td>
<td>$1,868,555</td>
<td>50%</td>
</tr>
<tr>
<td>Health insurance</td>
<td>$3,808,620</td>
<td>20%</td>
</tr>
</tbody>
</table>

Budgetary Tradeoffs

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom teachers</td>
<td>($2,602,875)</td>
<td>-6%</td>
</tr>
</tbody>
</table>
**Holyoke Public Schools**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06</th>
<th>FY14</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$86,907,314</td>
<td>$89,554,632</td>
<td>$2,647,318</td>
<td>3%</td>
</tr>
</tbody>
</table>

**Required Cost Increases**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Health insurance</td>
<td>$2,703,099</td>
<td>36%</td>
<td>Building maintenance</td>
<td>($1,100,524)</td>
<td>-51%</td>
</tr>
<tr>
<td>Transportation</td>
<td>$1,476,635</td>
<td>51%</td>
<td>Classroom teachers &amp; guidance counselors</td>
<td>($3,009,563)</td>
<td>11%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Textbooks &amp; instructional technology</td>
<td>($4,098,042)</td>
<td>-97%</td>
</tr>
</tbody>
</table>

**Budgetary Tradeoffs**

**Springfield Public Schools**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06</th>
<th>FY14</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>General Fund</td>
<td>$268,156,274</td>
<td>$368,236,341</td>
<td>$100,080,067</td>
<td>37%</td>
</tr>
</tbody>
</table>

**Required Cost Increases**

<table>
<thead>
<tr>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
<th>Category</th>
<th>FY06-14 Change</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retirement</td>
<td>$5,337,003</td>
<td>106%</td>
<td>Textbooks</td>
<td>($2,377,231)</td>
<td>-71%</td>
</tr>
<tr>
<td>Health insurance</td>
<td>$17,228,023</td>
<td>64%</td>
<td>Building maintenance</td>
<td>($3,019,434)</td>
<td>-62%</td>
</tr>
<tr>
<td>Transportation</td>
<td>$5,806,437</td>
<td>44%</td>
<td>Psychological services</td>
<td>($377,207)</td>
<td>-19%</td>
</tr>
</tbody>
</table>

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1. Source: MA Department of Elementary and Secondary Education, per pupil expenditure reports
2. Source: MA Department of Elementary and Secondary Education, expenditures per pupil
March 9th, 2015

My name is Leila Quinn and I am the Massachusetts Advocacy Manager for Generation Citizen, or “GC.” We are a national non-profit working to ensure that every student in the US receives an effective action civics education. GC envisions a country of young people working to collectively rebuild our American democracy.

State law charges our schools with a civic mission that we must revive. Just as students learn math by solving problems, and learn science through experiments, students should learn civic life by developing habits including taking action on issues they care about. Our young people must know the historical context for our civilization and how government affects their daily lives so they may use their voices. This is the crucial moment for Massachusetts to reclaim our spot as leaders in the field.

I am here today to ask that the Chapter 70 Foundation Budget formula include funding for social studies and civics education. We must keep these departments fully funded to provide the salaries and professional development for our teachers, as well as the resources to create engaging curricula.

The recent trend toward a combined “humanities” course is concerning. It is crucial that our students gain explicit social studies and civics course experiences. A single period is not enough to cover the content of what were once separate ELA and social studies courses, and there is neither a humanities curriculum, nor alignment with DESE’s history and social studies frameworks. In many districts 8th grade is a key year for civic learning, and yet the middle school social studies courses have been cut to a half-year.

With fully funded social studies departments across the state, we can ensure that our students come away with the civic knowledge, skills, and motivation to be engaged throughout their lives. Take for example, GC alumnus Anthonoy Mendez, who said “I went from knowing nothing at all about politics to realizing that I want to be an activist.” After his civics class he began interning for a City Councilor over the summer and got an opportunity to meet with Michelle Obama. Impressed with Anthony’s passion for leadership and his story, she invited Anthony to attend the State of the Union address as her special guest in January 2015. Anthony is now a freshman at the University of Hartford, studying Political Science. Let’s give every student in the Commonwealth the foundation for such a vibrant civic life.

Fully funded social studies departments and action civics classes will create a population of young people who build social movements, express eloquent political opinions, and make headlines with their groundbreaking work.

I ask that in your final recommendations, you include allocations for social studies and civics education in the Foundation Budget formula, as they are essential for restoring a healthy democracy. Thank you for your time.

Leila Quinn
Generation Citizen
Advocacy Manager
lquinn@generationcitizen.org
914-569-9539
Good afternoon and thank you very much for the opportunity to speak and, hopefully, to work with you on this critical topic: adequate funding for public education in Massachusetts. Your work is coming at a pivotal time for Massachusetts since I firmly believe that we are at a tipping point between our ability to remain the best system in the country and the ability for local property taxes to support this mission.

1. **Much More Data and Tools Available to Affect Student Achievement than Revenue Supports**

This is my 17th year as a Walpole School Committee member and for 17 years, I have served on our Legislative subcommittee. Some may suggest that I am a slow learner! I will use Walpole as an example, but I know many others whose names could be substituted. We are and always will be a town that spends below the state average per pupil, yet it is our goal, which we frequently achieve, to score in the top 25% of the State. One important component to our success is an open honest and direct relationship with our Teacher’s Association, despite the fact that our average teachers’ salary is also below the State average. We have twice, once before the help of the Municipal Health Care reform and once after, worked with the WTA to make major changes to the health care offered to all Walpole employees. We have also worked to contractually flatten the growth of teacher salaries from year to year and have had two successful Proposition 2 1/2 overrides, one in 2001 and one in 2012, despite the fact that Walpole prides itself on being a conservative town. In both cases, we were successful largely because the majority of class sizes throughout the system were over 27 students, even though classroom teachers were only cut after every other option was exercised. Recently I realized that our ability to deliver curriculum and instruction tells an important story as well. Being a town that spends below the average, requires constant prioritization, yet we have so much data that tells us what we can do to improve student learning. About 10-12 years ago, we recognized that we needed to update both our literacy and math programs. Literacy was the determined priority and it took 8 years to financially implement an improved program for grades K-5 because we could only afford to purchase one grade at a time and twice we had to suspend the effort because even the single grade purchase was beyond our ability. In our 2012 override, we built in the costs necessary to purchase a new mathematics programs over two years, first for the elementary grades and then for the secondary years. One point to note here is that although we had the information to identify how to improve, too many students completely missed the benefits of this knowledge. The other is that even though the 2012 override was less than 3 years ago, the dedicated revenue that allowed us to make some very sound purchases for mathematics, was intended to be used for future years’ improvements in curriculum and instruction to avoid repeating the previous scenario. And after just 3 years, growth largely in health insurance and special education have caused us to dedicate most of these funds to recurring costs related to providing level services in the FY16 budget. Walpole is far from unique in this story, but I think that despite the overwhelming data indicating how to drive student achievement, cities and towns are at the limit of being able to pay the bill.

2. **The Recession has Had a Strangling Effect on Minimum Aid Cities and Towns**

This leads into my second point. During this most significant recession, the Legislature prioritized the funding of Chapter 70 and over the 5 years from FY10-FY15 increased the amount available through Chapter 70 by 11.4%. We are extremely appreciative of the other hard choices that needed to be made in order to accomplish this priority. What I want to point out is that the distribution of this $450 million of new money only benefitted about 1/3 of all cities and towns. In Walpole’s case, with no significant enrollment changes, our Chapter 70 aid
only increased by 0.5% over the 5 year period and now in the Governor’s proposal it remains the minimal $20 per student. This puts unsustainable pressure on the property tax, even when it happens for 1 or 2 years in a row, but when it goes on for over 5 years, we are left compromising on priorities and less likely to remain competitive. That would be unfortunate enough if this were a “Walpole problem”, but I have gathered information about the entire Commonwealth from DESE and DOR, and have attached a spreadsheet of a subset of this information and will email the entire database to your committee. The information shows that close to two-thirds of the cities and towns have not benefitted from 11.4% growth in Chapter 70 Aid and in the Governor’s FY16 proposal, even more cities and towns have become “minimum aid” recipients. So my point here is that if the vast majority of cities and towns receive $20 or $25 per student, whether it is for one year or more than 5 in a row, we are making decisions that will likely compromise Massachusetts’ public education standing nationally and this will also likely have an overall impact on the State’s economy. As stated in his report, Revenue Sharing and the Future of the Massachusetts Economy (1), Northeastern economist, Barry Bluestone’s research supports that “Companies do not relocate to States, they relocate to Municipalities” and therefore our state economy relies on healthy cities and towns. So, in addition to addressing the inadequacy of the Foundation budget, an equitable distribution of all new dollars needs to be a priority to compensate for recent years. Please attend to the way the dollars are distributed as well as the inadequacy of costs related to special education, health insurance and technology.

3. Taking a View of Local Aid from the Macro Level

The previous point requires the Foundation Budget Review Commission and eventually the Legislature to look at the components and distribution rules of the Foundation Formula in close detail. I would argue that it is also important at this time to consider this topic from the larger perspective and the Massachusetts Municipal Association has done extensive work in its recently released 10 Partnership Policies to Build a Stronger Commonwealth (2). The main points that I learned here are best illustrated graphically:

- Actual Net School Spending represents the real costs to achieve Massachusetts’ results and the extra effort required to support Actual Net School Spending is coming almost entirely from local property taxes, that contribute over $1.6 billion

LOCAL SCHOOL SPENDING EFFORT ABOVE THE MINIMUM

![Graph showing local school spending effort above the minimum over fiscal years 2004 to 2014.](image-url)
Municipal Aid is defined as the combination of Chapter 70 and Unrestricted General Government Aid. These two graphs show that both as a percentage of state tax revenue dedicated to municipal aid and as a proportion of municipal costs split between state and local, we have returned to 1981 levels BUT WE NO LONGER EVEN HAVE THE ABILITY TO RAISE LOCAL TAXES BEYOND 2 ½ %, even if we wanted to.
Summary

In spite of the fact that school districts have tremendous insight as to how to improve student learning, available dollars do not allow for implementation, especially in “Minimum Aid” districts. The data provided in the last section, drives home the fact that this is a very large problem, that needs to be addressed over a period of years. But I would argue that in embedded in these decisions are some of Massachusetts’ most precious core values. We are doing many things right, but cannot continue down the same path. A solution will require a concerted effort to combine the voices of local officials (both school and municipal), school superintendents, state legislators and concerned parents. I hope that the work of the Foundation Budget Review Commission is the catalyst to get started and I look forward to working with you.

Respectfully submitted by:  

Nancy Gallivan, Vice chair: Walpole School Committee and Vice President: Suburban Coalition

1) Barry Bluestone, January 2006, “Revenue Sharing and the Future of Massachusetts Economy”

2) Mass Municipal Association, September 2014, “Our Communities and Our Commonwealth; Partners for Prosperity 10 Partnership Policies to Build a Stronger Commonwealth”,
   “http://www.mmaa.org/about-mma/mainmenu-12/publications”
My name is Mike Heichman. I live in Dorchester. I was a public school teacher in Somerville for one year, and a teacher in Chelsea (my school system when I was a child) for 34 years. I retired in 2004. I still am a substitute teacher at Chelsea High. I am proud that I have taught thousands of the Commonwealth’s children. My daughter went through the Boston Public Schools from K-12 and graduated in 2009. I have been an educational activist for 45 years and will continue to stand up for our children and for public education for the rest of my life.

Across the Commonwealth, we need schools that our children and our communities deserve.

The Education Reform Act of 1993 was a response by the state government to a court case (McDuffy) that said that our Commonwealth was not providing a quality and equitable education for many of our children, especially low-income children of color.

As a teacher in Chelsea and as a parent in Boston, I can attest to the very modest and consistent progress that was made for about ten years because of the increase in state resources.

However, for approximately the last ten years, our state has massively retreated from its commitment to providing quality and equitable schools. Education Reform has been subverted. There has been increased corporate control of our curriculum, which had previously been more in the hands of local communities and educators who knew their students. More of the time spent in school was focused on pressuring our children to pass invalid and discriminatory standardized tests with punitive consequences for our children, their families, educators and our schools, and our communities. In many low-income communities, schools became testing prep centers instead of educating the whole child. While the Education Department and corporate media wrongly scapegoated our children, their families, our educators and their unions, this failure was caused by this retreat in commitment and resources from the Commonwealth, and the false turn to increased privatization and charter schools.

In the next two weeks, I plan on testifying before the Boston School Committee on their proposed budget for the next school year. Instead of providing more resources that our children and communities need and deserve, I will be protesting against another round of destructive budget cuts and school closings. Yes, we in Boston must do better. However, we in Boston need and deserve more resources from our Commonwealth.
Does our Country and Commonwealth really value the education and lives of all of our children? The answer has been “NO”.

If we believe that our children’s education matters and if we believe that our children’s lives matter, then there is an alternative for this Commission to consider and adopt.

1. We need a Foundation Budget that will provide billions more per year and to provide those funds in ways that not only will promote quality, but also insure equity. Make the Foundation Budget live up to its title.

2. Instead of a continuation of regressive taxes and increased cutbacks and austerity, we need a system of progressive taxes. The wealthy have recovered from the Epic Recession that it created; there are far more millionaires and billionaires today than before the collapse. Tax the Rich!

3. Support our public schools and institutions. Stop relying on standardized tests and call on our cities and towns to create improved methods of assessment. No more charter schools.

Our children’s education matter. Our children’s lives matter. We need schools that our children and their communities deserve. Their future is in our hands.
In 1974, the Commonwealth of Massachusetts implemented Chapter 766 that had become law in 1972. It also became the model for federal legislation that supports the need to educate children and youth with disabilities.

The implementation of 766 required all Massachusetts school departments to change and enhance their approach to educating students with disabilities. This required skilled staffing to assess the educational needs of students who might fall under the purview of 766 and to provide or contract for appropriate services. Over time, funding for this process and for these services became a big issue for school departments; dollars required to meet the goals of 766 competed with funding for other educational services. In some communities a growing pattern of conflict between general education and special education parents emerged regarding the need to provide these services, sometimes, expensive services for students with disabilities when overall funding for education did not keep pace.

To address the funding issues that emerged, the Massachusetts Education Reform Act of 1993, establishing the basis for the current chapter 70 formula, included in its state reimbursement scheme a factor for students with disabilities to assist school systems to cope with funding special education services. It is generally agreed that the factor included at the time understated the size and complexity of the population of students with disabilities in many communities. It is important to remember that it is the Commonwealth that is ultimately responsible for meeting the requirements of 766 and thus appropriate state reimbursement to local school departments is necessary to meet this mandate.

Coalition Member Organizations: Children’s League of Massachusetts, Federation for Children with Special Needs, Massachusetts Administrators for Special Education, Massachusetts Advocates for Children, Massachusetts Association of School Committees, Massachusetts Association of School Superintendents, Massachusetts Association of Special Education Parent Advisory Councils, Massachusetts Association of 766 Approved Private Schools, Massachusetts Organization of Education Collaboratives, Parent Professional Advocacy League, Stand for Children
In addition, since the inception of 766, there have been many changes in diagnoses and knowledge around students' special education learning needs, and the appropriate special education interventions needed to address the needs. For example, the number of students diagnosed on the autism spectrum has increased dramatically. In addition improved medical care for premature infants reducing the infant mortality rate has resulted in a greater need for later services. Federal law requires an increased focus on meeting the transition needs of older students with disabilities, to help ensure that they exit special education with the skills necessary to succeed in college, jobs, and independent living.

With a sometimes inadequate base of support in the formula and new research and understanding of the special needs of students, the Commonwealth and school departments have found it challenging to adjust funding to meet the educational needs of the special needs population in the appropriate setting; they must also meet the needs of these students in the least restrictive environment.

In addition, of course, they have an obligation to ensure that the broad education programs for all children are kept whole.

A boost to meeting these goals was the circuit breaker, implemented in fiscal year 2004. It is a mechanism that transformed the funding for educating students with significant disabilities. The circuit breaker requires that the Commonwealth reimburse school systems for a substantial portion of very high cost educational plans for those students whose disabilities require extensive services. Its structure is meant to take a substantial financial burden off the shoulders of school systems while not incentivizing more extensive remediation than is necessary to meet the needs of the student.

As the Commission considers all of the aspects of the Chapter 70 formula, we ask that you evaluate carefully the funding necessary to meet the Commonwealth's obligation to students with disabilities. Specifically, we urge that the new formula reflects the size and nature of the Commonwealth's population of children and youth with disabilities, including the understanding that the
meeting of some special education needs requires high cost programs to adequately and effectively meet the needs of students with disabilities. Consideration should be given to the formulation of a new funding formula that is simplified and structured to meet the needs of students with disabilities at each district level, and provide parity to general and special education learners and other diverse learners.

We ask also that the Commission consider that special needs programs can result in the need for fewer services or more productive citizens in later years, highlighting that these programs are effective. For example, for children on the Autism spectrum, research has shown that the earlier and more intense services are, the better the outcomes for children. With the Inclusive Concurrent Enrollment program, in which students with disabilities are integrated into higher education classes, these students will be able to function better and contribute to their community.

In working towards assuring that the educational needs of all students in the Commonwealth are met, realistic support for special needs services in the education reimbursement formula is necessary for the Commonwealth to meet its obligations under Chapter 766 to students who require these services.

Respectfully Submitted,

Jerry Mogul
Executive Director, Massachusetts Advocates for Children
On Behalf of the Massachusetts Coalition to Restore Special Education Funding
The Schools Boston’s Students Deserve
Proposals to Strengthen Our Boston Public School System (BPS)

1. **Recognize That Class Size Matters:** Drastically reduce class size by correctly recalculating State Aid.
2. **Educate The Whole Child:** Invest to ensure that all schools have recess and physical education equipment, and classes in art, theater, dance, and music in every school. Offer world languages and a variety of subject choices. Provide every school with a library and assign the commensurate number of librarians to staff them.
3. **Create More Robust Wrap-around Services:** Due to the current state aid miscalculations, the BPS is behind recommended staffing levels suggested by national professional associations. The number of school counselors, nurses, social workers, and psychologists must increase dramatically to serve Boston’s population of low-income students. Additionally, students need safe and affordable transportation to school.
4. **Address Inequities In Our System:** Students and their families see a growing two-tier school system. Because of severe budget constraints it denies resources to the neediest schools, uses discipline policies with a disproportionate harm on students of color, and enacts policies that increase the concentrations of students in high poverty and racially segregated schools. In addition privately run charter schools take resources away from students who need them the most.
5. **Help Students Get Off To A Good Start:** We need to provide age-appropriate (not test-driven) education in the early grades. All students should have access to pre-kindergarten and to full-day kindergarten.
6. **Respect And Develop The Professionals:** Teachers need time to adequately plan their lessons and collaborate with colleagues, as well as the autonomy and shared decision-making to encourage professional judgment. BPS needs to hire more teaching assistants so that no students fall through the cracks.
7. **Teach All Students:** We need stronger commitments to address the disparities that exist due to our lack of robust programs for English Language Learners and services for students faced with a variety of special needs.
8. **Provide Quality School Facilities:** No more leaky roofs, asbestos-lined bathrooms, or windows that refuse to shut. Students need to be taught in facilities that are well-maintained and show respect for those who work and go to school there.
9. **Partner with Students, Parents and the Community:** Students and parents are an integral part of a child’s education. They need to be encouraged and helped in that role along with organizations and congregations in our communities. All students and families need regularly quality engagement by school and district leadership so that their voices and experiences regularly inform policies and reforms that directly affect them. All students and their parents should be elected and represented on school-based decision making bodies of their schools and district.
10. **Fully Fund Education:** A country, state and city that can afford to take care of its affluent citizens can afford to take care of those on the other end of the income scale. There is no excuse for denying students the essential services they deserve.

The Boston Education Justice Alliance (BEJA) We are students, educators, parents, school staff, and concerned community members who are deeply tied to the neighborhoods of Boston and directly affected by public education. We are committed to building a stronger and better public school system that is driven by community voices. By engaging all communities in Boston and building power through unity, our youth and parent driven coalition is committed to working with our elected and appointed officials and holding them accountable to the actual needs and desires of the communities served by Boston Public Schools.

For more information contact Marléna Rose at otimacampaign@gmail.com

Like Boston Alliance for Educational Justice on Facebook- http://on.fb.me/18urXYA
What is the Foundation Budget?
- The Foundation Budget formula is how the state determines education aid for each school district. It is a product of the state's Education Reform Act of 1993 (when cassettes were big) and other than lowering the per pupil rate for middle school, has not experienced a revision since.

What's the problem?
- The formula is outdated! For the past 22 years the state has ignored providing additional funding for dramatically rising costs and needs in our state - we are still running on 20th century cassette tapes in a 21st century budget!
- Not updating the formula has resulted in the equivalent of a $2 billion cut annually from statewide education aid, as compared to 1993.
- The current formula under-calculates SPED education costs by $1 billion and health insurance costs by $1.1 billion. (Mass Budget and Policy Center)
- Because of the under-calculating of costs, most school districts in the state hire fewer regular ed. teachers than the foundation budget would suggest.
- The foundation budget formula has not accounted for natural inflation costs.

Our Solutions
- We need a 21st century Foundation Budget formula for 21st century schools! We demand the schools all our communities deserve—schools where a community can flourish without constant fear of crippling budget crises year after year. The next foundation budget formula should:
  - Fund the full costs of ELL and SPED education and give them appropriate weights.
  - Analyze and include tracking of real inflation of costs over time and rise accordingly.
- We need a fairer and more equitable tax system where the wealthier who have reaped the most economic gains since 1993 pay their fair share so every student in Massachusetts has the same opportunity to learn.

Take Action!
- Call and e-mail your state legislators, find out who and how here: https://malegislature.gov/People/Search