

# Somerset Berkley Regional Planning Board

Members:

Julie M. Ramos Gagliardi, Richard Fenstermaker, Jenifer Andrews,  
Victor Machado, Michael McDonald, Richard Peirce, Jennifer Vincent, Derek Costa,  
Daniel Hebda, Kimberly Hebert, George Kelly, Dean Larabee, Shannon Martin,  
Thomas Lynch, Holly McNamara, Robert Gaw

# SB Regional Planning Board

## Context and Process

- ▶ Original Agreement was approved on July 26, 2010 by Mitchell D. Chester EdD DESE Commissioner after certified votes of approval by both member towns.
- ▶ Section 17 of original document provided for the periodic review of the Agreement.
- ▶ First review was conducted in 2015-2016 - no changes were recommended.
- ▶ November 2020, SB Regional School Committee established a Regional Planning Board made up of 16 individuals representing Somerset and Berkley and including all members of the SB Regional School Committee.
- ▶ Since November, RBP members have held more than 20 meetings, including full RP Board meetings, work-group meetings and consultations with DESE officials.

# Process to Amend Regional Agreement

*DESE January 2015*

- Step 1: Follow the Process in the Existing Agreement
- Step 2: Select the Committee to Coordinate the Amendment Process
- Step 3: Regional Planning Board/School Committee Drafts Amended Agreement
- Step 4: Department (DESE) Review
- Step 5: Department (DESE) Feedback
- Step 6: Regional School Committee Approval
- Step 7: Member Municipality Approval
- Step 8: Final Submission to the Department (DESE)
- Step 9: Approval by the Commissioner of Elementary and Secondary Education
- Step 10: Effective Date

# SB Regional Planning Board Workgroups

- ▶ SBRSC Tri-District Collaboration Sub-Committee

*Julie Ramos Gagliardi, Jennifer Vincent, Victor Machado*

- ▶ Collaboration Workgroup

*Victor Machado, Jeffrey Schoonover, Kimberly Hebert, Thomas Lynch, Richard Fenstermaker*

- ▶ Language Review Workgroup

*Jennifer Vincent, Derek Costa, Shannon Martin, Michael McDonald, Richard Peirce*

- ▶ Assessment Review Workgroup

*Julie Ramos Gagliardi, Jenifer Andrews, Daniel Hebda, Dean Larabee, George Kelly,  
Holly McNamara, Jeffrey Schoonover*

# SB Regional Planning Board Educational Collaboration

- ❖ Professional Development Opportunities among Berkley K-8, Somerset K-8 and SBRHS include but not limited to:
  - District November Ed Camp
  - SBRHS Content Coordinators work with Grade 8 teachers on student transition.
  - Work with curriculum development to vertically align scope and sequences and curriculum mappings, grades 6-9.
  - Grade 8 teachers have opportunities to observe in the 9<sup>th</sup> grade classes to help understand and support high school level expectations and student learning needs.
  - Content area teachers at Berkley Middle, Somerset Middle and SBRHS work together to review new curriculum programs/series to ensure they align to the MA state frameworks and align to high school expectations.
  - SBRHS Content Coordinators share educational support materials, team meetings and conference offerings.

# Administration - Guidance - Support Staff Collaboration

- ❖ Berkley Middle School Principal, Somerset Middle School Principal and Guidance meet with SBRHS Administration, Guidance and School Adjustment Counselors for 8<sup>th</sup> grade to 9<sup>th</sup> grade transition: student scheduling needs, social-emotional student needs, step up opportunities including Big Buddy days and summer offerings.
- ❖ Berkley's K-8 & Somerset's Director of Student Services work with SBRHS Special Education Department to ensure all special education students' schedules are created according to their Individual Educational Plans at transition meetings in the spring of each school year.
- ❖ Ongoing communication with all groups to support students' educational and social-emotional needs throughout their high school experience.
- ❖ Support and communication with families in all communities, Berkley K-8, Somerset K-8 and SBRHS regarding educational, extra curricular and social-emotional offerings, supports and opportunities.
- ❖ SBRHS Guidance Department works with both middle schools to ensure all Grade 8 students successfully create high school schedules via the Aspen student management system.
- ❖ School Nurses in Berkley Middle, Somerset Middle and SBRHS work collaboratively to ensure all student health records and information transfer successfully.
- ❖ Office Assistants in Berkley Middle, Somerset Middle, SBRHS and SBR Central Office work collaboratively to ensure all student data transfers successfully each year.

# Athletics & Other Organizations

- ❖ Berkley Middle School and Somerset Middle School are part of the Massasoit League, which includes 10 other area middle schools where we participate in athletics including: Soccer, Fall Cross Country, Basketball, Cheer, Baseball, Softball, Spring Cross Country, Unified Sports, Math League and Debate League.
- ❖ SBRHS Athletic Director and various coaches work with both Berkley and Somerset Middle Schools' teams to offer the opportunity to play a "home game" on the High School fields/courts.
- ❖ SBRHS Music and Athletics groups - students volunteer to assist middle school students in feeder programs.
- ❖ SBRHS Show Choir performs for the middle schools.
- ❖ In the spring each middle school sends out an Athletic Survey to their 8<sup>th</sup> graders to help SBRHS get a sense of participation for the following year.
- ❖ Berkley, Somerset, and SBRHS joined together in their Special Education Parent Advisory Committee in 2020.
- ❖ Berkley Middle School and Somerset Middle School's PTO groups have worked together to offer joint social opportunities for the students in both middle schools.

# Ongoing Communication & Opportunities

- ❖ Ongoing communication between Berkley's K-8 Superintendent and Somerset K-8/SBRHS Superintendent.
- ❖ Ongoing communication between Berkley Middle School, Somerset Middle School and SBRHS Administration.
- ❖ Participation at many SBRHS events: Graduation, 8<sup>th</sup> Grade Parent Orientation, Art shows, Theater productions, Music performances, Awards ceremonies, etc.
- ❖ Support of students' CAPstone projects
- ❖ Support of new Administration Mentor program.



# Future Collaboration Opportunities/Suggestions

- ❖ Communication among the Elementary schools in Somerset and Berkley.
- ❖ Possible shared services:
  - Technology Coordinator/services
  - Unified Arts expansion - Music/Band
  - Theater/Performing Arts
  - Peer Classroom observations between Elementary and Middle School
  - School Committee Collaboration
  - Innovation Pathways/MyCAP opportunities
  - Profile of the Graduate PreK-12
  - Professional Development opportunities:
    - Clerical
    - Maintenance
    - Support staff
    - Teachers

# SB Regional Planning Board Language Review

- ▶ Started with the work done by 2015 Regional Planning Board - Report dated March 29, 2016
- ▶ Reviewed several Regional Agreements from other Regions
- ▶ Periodically provided draft language updates to DESE for their review and comment

# SB Regional Agreement Language Updates

- ▶ General updates to the original Regional Agreement that delete references to the Transition Plan and Interim Period which are no longer relevant.
- ▶ The deletion of references to staggered terms for elected officials used at the start of the region which are no longer relevant.
- ▶ The deletion of references to the former Somerset High School building and sale of the land to the District.
- ▶ Updating language relative to the Budget Development process to be in line with M.G.L. and State Regulations, including adding language relative to amendments to approved budgets.
- ▶ The Amended Agreement also details both the Statutory and the Alternative Assessment Methodologies which may be used to allocate the annual operating and capital expenditures between the two member towns.

# SB Regional Agreement Assessment Review

- Original Alternative Assessment Method was developed to gradually increase Berkley's contribution for the High School as the state was moving Berkley to Target Share
- This Alternative Method Model worked as projected. From 2012 to 2021 -
  - Berkley contribution since 2012 has **increased \$1,380,975**
  - Somerset contribution since 2012 has **decreased \$1,193,153**
- Last year, SB School Committee voted to use a Statutory Method.
- Berkley recognized that FY 21 increase was in part driven by new Out of District Special Education placements coming from Berkley K-8- "These costs were already being paid by Berkley residents".
- Assessment Review Workgroup compared breakdown of enrollment between the two member communities for Regular Education vs Special Education Out of District Placements

# SB Regional Agreement

## New Alternative Assessment Method

- ▶ Based on the state-determined Minimum Local Contribution for each member town and all the costs in excess of the Minimum Local Contribution allocated on a per pupil basis
- ▶ Net Out-of-District Special Education Tuition costs are assessed to each member town based on the actual costs incurred on behalf of all current and incoming high school students who are residents of said member town for the year for which the budget is being prepared.
- ▶ In many instances, these costs have already been included in the Member Town's preK-8 Budget and then are transferred to the Regional School Committee Budget as students move to high school.

***For example, using this New Alternative Assessment Method for FY22, the TOTAL COST to Somerset Taxpayers for Prek-12 Education is projected to increase just over 2%***

- ▶ This new Alternative Assessment Methodology more fairly allocates the expenses associated with costly Out of District Special Education Tuitions to the members based on the costs incurred on behalf of students residing in their respective towns.
- ▶ SB Regional School Committee voted unanimously on March 23, 2021 to adopt new Alternative Assessment Methodology to determine FY22 Assessments for member towns

	FY20-21			FY21-22			FY21-22		
	STATUTORY			ALTERNATIVE			STATUTORY		
	CURRENT FORMULA			Estimated Chapter 70 per Gov			Estimated Chapter 70 per Gov		
	Total	Somerset	Berkley	Total	Somerset	Berkley	Total	Somerset	Berkley
<b>Student Enrollment</b>	1,027	741	286	1,024	749	275	1,024	749	275
Student %		72.15%	27.85%		73.14%	26.86%		73.14%	26.86%
<b>STEP 1: TOTAL ADJUSTED BASE OPERATING BUDGET</b>									
<b>Total Operating Budget</b>	\$ 18,527,068			\$ 19,662,847			\$ 19,662,847		
Less: Total Transportation Cost	\$ 844,264			\$ 919,582			\$ 919,582		
Less: Capital Assessment	\$ 2,181,944			\$ 2,176,771			\$ 2,176,771		
Less: OOD Special Education Tuition				\$ 1,598,115					
<b>Total Adjusted Base Operating Budget</b>	\$ 15,500,860			\$ 14,968,379			\$ 16,566,494		
<b>STEP 2: STATE DETERMINED MIN LOCAL CONTRIBUTION</b>									
Minimum Local Contribution (DESE)	\$ 6,304,771	\$ 4,505,298	\$ 1,799,473	\$ 6,632,979	\$ 4,827,369	\$ 1,805,610	\$ 6,632,979	\$ 4,827,369	\$ 1,805,610
<b>STEP 3: AMT. ABOVE MIN IS ASSESSED PER PUPIL</b>									
Above Minimum	\$ 9,196,089	\$ 6,635,153	\$ 2,560,936	\$ 8,335,400	\$ 6,096,889	\$ 2,238,511	\$ 9,933,515	\$ 7,265,823	\$ 2,667,692
<b>STEP 4: BASE OPERATING ASSESSMENT</b>									
Above Minimum plus MLC	\$ 15,500,860	\$ 11,140,451	\$ 4,360,409	\$ 14,968,379	\$ 10,924,258	\$ 4,044,121	\$ 16,566,494	\$ 12,093,192	\$ 4,473,302
<b>STEP 5: CHAPTER 70 DIVIDED PER PUPIL</b>									
Chapter 70	\$ 6,142,834	\$ 4,432,171	\$ 1,710,663	\$ 6,054,825	\$ 4,428,773	\$ 1,626,052	\$ 6,054,825	\$ 4,428,773	\$ 1,626,052
<b>STEP 6: OTHER GENERAL FUND REVENUE SOURCES</b>									
(Less Charter School Reimb.)	\$ (16,552)	\$ (11,943)	\$ (4,609)	\$ (16,257)	\$ (11,891)	\$ (4,366)	\$ (16,257)	\$ (11,891)	\$ (4,366)
(Less Interest Income)	\$ (20,000)	\$ (14,430)	\$ (5,570)	\$ (15,000)	\$ (10,972)	\$ (4,028)	\$ (15,000)	\$ (10,972)	\$ (4,028)
(Less Medicaid & E-Rate)	\$ (123,000)	\$ (88,747)	\$ (34,253)	\$ (123,000)	\$ (89,968)	\$ (33,032)	\$ (123,000)	\$ (89,968)	\$ (33,032)
(Less: Television Production)	\$ (80,400)	\$ (80,400)		\$ (80,400)	\$ (80,400)		\$ (80,400)	\$ (80,400)	
SRO Adj		\$ 2,766	\$ (2,766)						
Total Other Revenue	\$ (239,952)	\$ (192,754)	\$ (47,198)	\$ (234,657)	\$ (193,231)	\$ (41,426)	\$ (234,657)	\$ (193,231)	\$ (41,426)
<b>STEP 7: TOTAL OPERATING ASSESSMENT</b>									
Base Oper Assessment less Chap 70 and other rev	\$ 9,118,074	\$ 6,515,526	\$ 2,602,548	\$ 8,678,897	\$ 6,302,254	\$ 2,376,643	\$ 10,277,012	\$ 7,471,188	\$ 2,805,824
Total Transportation Costs	\$ 975,833			\$ 1,093,320			\$ 1,093,320		
Less: Transportation Aid	\$ (131,569)			\$ (173,738)			\$ (173,738)		
Net Transportation Costs	\$ 844,264	\$ 609,153	\$ 235,111	\$ 919,582	\$ 672,624	\$ 246,958	\$ 919,582	\$ 672,624	\$ 246,958
Add: OOD Special Education Tuition				\$ 1,598,115	\$ 1,529,475	\$ 68,640	\$ -	\$ -	\$ -
<b>TOTAL OPERATING ASSESSMENT</b>	\$ 9,962,338	\$ 7,124,678	\$ 2,837,660	\$ 11,196,594	\$ 8,504,353	\$ 2,692,241	\$ 11,196,594	\$ 8,143,812	\$ 3,052,782
- Cost per student		\$ 9,614.95	\$ 9,921.89		\$ 11,354.28	\$ 9,789.97		\$ 10,872.91	\$ 11,101.03
- Cost per student excluding OOD					\$ 9,312.25	\$ 9,540.37		\$ 10,872.91	\$ 11,101.03
<b>Statutory vs Alternative Assessment Formula</b>									
<b>Assessment Change</b>		\$ 1,379,675	\$ (145,419)		\$ 1,379,675	\$ (145,419)	<b>Assessment Change</b>	\$ 1,019,134	\$ 215,122
		19.36%	-5.12%		19.36%	-5.12%		14.30%	7.58%
<b>STEP 8: CAPITAL ASSESSMENT</b>									
Capital Assessment	\$ 2,181,944	\$ 1,574,314	\$ 607,630	\$ 2,176,771	\$ 1,592,189	\$ 584,582	\$ 2,176,771	\$ 1,592,189	\$ 584,582
<b>STEP 9: TOTAL ASSESSMENT</b>									
Total Assessment	\$ 12,144,282	\$ 8,698,992	\$ 3,445,290	\$ 13,373,365	\$ 10,096,542	\$ 3,276,823	\$ 13,373,365	\$ 9,736,001	\$ 3,637,364
Change from previous year					\$ 1,397,550	\$ (168,467)		\$ 1,037,009	\$ 192,074
Total OOD Special Educ Tuition Budget by District Circuit Breaker and IDEA Funds as % of OOD below				\$ 2,298,115	\$ 2,152,782	\$ 145,333	\$ 2,298,115	\$ 2,152,782	\$ 145,333
NET OOD ASSESSMENT (carried in row 46 above)				\$ (700,000)	\$ (623,307)	\$ (76,693)	\$ (700,000)	\$ (623,307)	\$ (76,693)
				\$ 1,598,115	\$ 1,529,475	\$ 68,640	\$ 1,598,115	\$ 1,529,475	\$ 68,640
Current Year Estimated OOD (Project Amount)				\$ 2,057,102	\$ 1,831,723	\$ 225,379	\$ 2,057,102	\$ 1,831,723	\$ 225,379
% of Total OOD Special Education Tuition					89%	11%		89%	11%

## Assessment History by Member Community

<b>Fiscal Year</b>	<b><u>Operational</u> Assessment</b>	<b><u>Somerset</u> Allocation</b>	<b><u>Dollar Change</u> (\$)</b>	<b><u>Percentage</u> Change (%)</b>	<b><u>Berkley</u> Allocation</b>	<b><u>Dollar Change</u> (\$)</b>	<b><u>Percentage</u> Change (%)</b>
FY12	\$ 9,776,961	\$ 8,319,605			\$ 1,457,356		
FY13	\$ 9,420,233	\$ 7,725,329	\$ (594,276)	-7.1%	\$ 1,694,904	\$ 237,548	16.3%
FY14	\$ 9,323,960	\$ 7,651,883	\$ (73,446)	-1.0%	\$ 1,637,206	\$ (57,698)	-3.4%
FY15	\$ 9,261,812	\$ 7,465,508	\$ (186,375)	-2.4%	\$ 1,796,304	\$ 159,098	9.7%
FY16	\$ 9,109,266	\$ 7,075,915	\$ (389,592)	-5.2%	\$ 2,033,351	\$ 237,046	13.2%
FY17	\$ 9,725,009	\$ 7,384,458	\$ 308,543	4.4%	\$ 2,340,551	\$ 307,200	15.1%
FY18	\$ 9,462,960	\$ 7,030,991	\$ (353,467)	-4.8%	\$ 2,461,968	\$ 121,417	5.2%
FY19	\$ 9,766,864	\$ 7,288,188	\$ 257,197	3.7%	\$ 2,478,676	\$ 16,708	0.7%
FY20	\$ 9,478,447	\$ 6,899,146	\$ (389,042)	-5.3%	\$ 2,579,301	\$ 100,625	4.1%
FY21 Statutory	\$ 9,964,783	\$ 7,126,452	\$ 227,306	3.3%	\$ 2,838,331	\$ 259,030	10.0%
<b>FY22 (Preliminary) Alternative Revised 3/30/31</b>	<b>\$ 11,196,594</b>	<b>\$ 8,504,353</b>	<b>\$ 1,377,901</b>	<b>19.3%</b>	<b>\$ 2,692,241</b>	<b>\$ (146,090)</b>	<b>-5.1%</b>
<b>Cumulative Increase s ince 2012</b>		<b>\$ 184,748</b>			<b>\$ 1,234,885</b>		

# SB Regional Planning Board

## Approval of Amended Agreement

- ▶ Amended Agreement was approved by Regional School Committee at its meeting on April 27, 2021
- ▶ Community Forum and Presentations to A&F/BOS/FinCom to explain changes
- ▶ Copies of Proposed Amended Agreement available to public
- ▶ Somerset Town Meeting Presentation/Vote on May 17, 2021
- ▶ Berkley Town Meeting Presentation/Vote on June 7, 2021
- ▶ Formal Submission to DESE for final approval



# What happens if the Amended Agreement does not pass at Town Meeting?

- ▶ Regional School Committee would have to withdraw Warrant Articles for FY22 Assessments
- ▶ Member towns will be required to hold special town meetings to approve new assessments
- ▶ Regional School District will be forced to adopt a 1/12th budget to start FY22
- ▶ 1/12th Budget is based on FY21 Approved Budget and would result in cuts of more than \$1 million
  - ▶ Staff reductions
  - ▶ Program cuts, services to students could be reduced
  - ▶ Potential elimination of student activities and/or sports

# SBRSD Amended Regional Agreement

- ▶ Was developed by the Regional Planning Board/Regional School Committee working with DESE officials
- ▶ Started with the work done in 2015 and included additional analysis, extensive review and discussion over 20+ meetings
- ▶ Addresses necessary language updates to the existing Regional Agreement
- ▶ Outlines a new Alternative Assessment Method which more fairly allocates Out of District Special Education Costs
- ▶ Provides for stability in budgeting for future assessments
- ▶ Must be approved by each member town at Town Meeting in order to consider proposed assessments for FY22
  - Agreement is first of two votes at Town Meeting for the Regional School District*
- ▶ Once approved by both member towns, it can be formally approved by the Commissioner of Elementary Education

# Questions