

**Acton Public
School Committee Meeting**
January 19, 2012
7:30 p.m.

at the
R.J.Grey Junior High School Library

ACTON PUBLIC SCHOOL COMMITTEE MEETING

Library
R.J. Grey Junior High

January 19, 2012
7:30 p.m.

AGENDA with addendum

- 1.0 CALL TO ORDER
- 2.0 CHAIRPERSON'S INTRODUCTION
- 3.0 STATEMENT OF WARRANT
- 4.0 APPROVAL OF MINUTES
 - 4.1 APS SC December 15, 2011 (*addendum*)
- 5.0 PUBLIC PARTICIPATION
- 6.0 EDUCATION REPORT (7:35)

Balanced Assessments - *Deborah Bookis, Director of Curriculum and Instruction, Dr. Priscilla Kotyk and Matt McDowell, APS Assistant Principals, Eileen Sullivan, APS Elementary Curriculum Specialist, Jean Oviatt-Rothman, APS Mathematics Curriculum Specialist and Coach, Noel Erickson, Reading Specialist, Douglas School (addendum)*

 - 6.1 Presentation slides
 - 6.2 Supporting materials
 - 6.3 APS MCAS 2011 by school
- 7.0 APS SCHOOL COMMITTEE BUSINESS (8:30)
 - 7.1 Health Insurance Plan Design Working Group– *Marie Altieri (oral) (8:30)*
 - 7.2 Acton Health Insurance Trust Report – *John Petersen (8:35)*
 - 7.2.1 FYI – update from 1/5/12
 - 7.3 FY'13 Budget – *Steve Mills, Don Aicardi (8:40)*
 - 7.3.1 ALG Report – *Xuan Kong*
 - 7.3.1.1 Meeting materials, 1/12/12
 - 7.3.1.2 Discussion re: OPEB and Use of Free Cash
 - 7.3.2 Acton Finance Committee Report – *Xuan Kong*
 - 7.3.2.1 FinCom Point of View, 12/8/11
 - 7.3.2.2 Report on 1/10/12 meeting (*oral*)
 - 7.3.3 Preliminary Schedule for Saturday, January 28 JT SC Budget Meeting
 - 7.3.4 Presentation slides (*addendum*)
 - 7.4 2012-2013 Kindergarten Orientation, 1/10/12, *Marie Altieri (oral) (9:30)*
 - 7.5 APS Student Enrollment/Classroom Planning Report, *Marie Altieri (addendum) (9:35)*
 - 7.6 Discussion of Potential Acton Public School Students Tuitioning to Blanchard School, *Marie Altieri (addendum) (9:45)*
 - 7.7 New Ruling by AG: Remote Participation at Open Meetings – *Mike Coppolino (oral) (9:50)*
 - 7.7.1 Acton Board of Selectmen approved 1/9/12
 - 7.8 Recommendation to Accept Grant from IBM to Merriam – **VOTE** – *Steve Mills*
 - 7.9 Recommendation to Accept Grant from IBM to McCarthy-Towne – **VOTE** – *Steve Mills*
 - 7.10 Purposes and Timing of Addenda – *Mike Coppolino (oral)*

8.0 FOR YOUR INFORMATION (10:00)

8.1 Pupil Services

8.1.1 ELL Student Enrollment Report – January 1

8.1.2 OnTeam, Dec 2011/Jan 2012

8.1.3 New SpEd PAC Parent Handbook found at <http://www.abspedpac.org/>

8.2 FY'12 Monthly APS Financial Reports

8.3 Student Enrollment Numbers/Class Size Info – January 1

8.4 FY'11 APS Food Services Report

8.5 Correspondence from the Community

8.6 School Newsletters

Conant Crier: <http://conant.ab.mec.edu/pto/newsletter.html>

Douglas Digest: <http://douglas.ab.mec.edu/pto/digest.html>

Gates Gazette: <http://gatesschoolpto.org/gazette>

McCarthy-Towne Bulletin: <http://www.mctptso.org/bulletin/>

Merriam Comm News: <http://www.merriampto.org/Merriam>

Acton Public School Preschool: <http://ab.mec.edu/Preschool/index.htm>

8.7 Acton Town Election – March 27, 2012

Last Day for Candidates to File Papers with Town Clerk – February 6th

9.0 NEXT MEETINGS

January 28, 9:00 am – 3:00 pm Joint SC Budget Saturday, RJGJHS Library

February 2, 7:30 pm ABRSC at R.J. Grey Junior High School Library (*AB Open Budget Hearing*)

February 16, 7:00 pm APSC at R.J. Grey Junior High School Library (*APS Open Budget Hearing*)

ADJOURNMENT (10:05)

4.1
A

**ACTON PUBLIC SCHOOL COMMITTEE MEETING
Draft Minutes**

**Library
R.J. Grey Junior High**

**December 15, 2011
7:00 p.m.**

Members Present: Dennis Bruce, Michael Coppolino, Xuan Kong, Kim McOsker, Paul Murphy, John Petersen
Members Absent: none
Others: Don Aicardi, Marie Altieri, Deborah Bookis, Liza Huber (7:10), Steve Mills, Beth Petr

The Acton Public School Committee meeting was called to order at 7:00 p.m. by Chair Michael Coppolino.

STATEMENT OF WARRANT

Warrant #201212 dated December 13, 2011 in the amount of \$259,382.60 was signed by the chair and circulated for signatures.

APPROVAL OF MINUTES

The following minutes were approved: October 20, 2011 APS SC meeting (as amended), November 3, 2011 Joint SC meeting and November 17, 2011 APS SC meeting.

PUBLIC PARTICIPATION

Parent John Manning spoke from the audience, advocating for modulars to be installed at the Gates School to address a shortage of instructional space. He described art classes held in the hall and lobby, and music instruction in the cafeteria. He noted that other schools have gained considerable benefit from modulars that were added in past years. He asked the School Committee to consider a motion to add modulars at Gates next year to address this problem or offer an alternative. Mike Coppolino responded that the Superintendent would address this in the budget part of the meeting.

APS SCHOOL COMMITTEE BUSINESS

6.1 Policy Updates

6.1.1 Use of School Facilities Policy (File: KF)

This policy was already approved but the APS SC had not seen the revised procedures and fees (File: KF-R).

6.1.2 Advertising in Schools (File: KHB) – SECOND READING

This new policy was approved by ABRSC on 12/1/11. The subcommittee recommended that the Superintendent be responsible for approval and that he report to the School Committees once a year on advertising. A financial limit that would require a proposal to be approved by the School Committees was not felt to be necessary.

It was moved, seconded and

VOTED: to approve the Advertising in Schools Policy, File: KHB as proposed.
(YES: Bruce, Coppolino, McOsker, Murphy, Petersen NO: Kong)

6.2 2012-2013 School Calendar

Dr. Mills stated that the discussion is whether to start school before or after Labor Day, and whether to include days off for religious holidays. People's spiritual beliefs are being respected, however the issue is about the number of staff that would be out for a religious holiday, making it very difficult to appropriately staff the schools. Dr. Mills referred to the survey results from last year. The proposed calendar was approved by the ABRSC on 12/1/11, by a 7-6 vote. Recognizing the difference of opinion,

the Superintendent asked the APS SC to vote it for this year. It was noted that the late start days at the High School this year have been very valuable.

It was moved by John Petersen, seconded by Paul Murphy and

VOTED: to approve the proposed FY13 school calendar

(YES: Coppolino, McOsker, Murphy, Petersen NO: Bruce, Kong)

Xuan Kong felt that the before/after Labor Day start survey question did not really apply as much this year because it is not tied to this year's calendar. Kim McOsker advocated for starting after Labor Day in September 2012. John Petersen appreciated that staff are kept well informed so that families and staff can be sensitive to all religious holidays.

6.3 Update on Health Insurance Plan Design Process

Kim McOsker reported that the new working group's first meeting was very productive. They talked about some collaborative decisions, and felt there may be an opportunity to make changes in a good way and be sensitive to what people need and/or want. The second meeting was yesterday. The group is made up of representatives from all of the town's unions including: police, fire, dispatch, custodial, retirees, School Committee rep, Board of Selectmen rep, Marie Altieri from the schools, Mary Ann Fleckner from the Town of Acton and Town Manager Steve Ledoux. Lauren Rosenzweig is facilitating. The group is tasked with presenting alternatives to match or compare to the Segal Report results. It is hoped that results will be achieved by the February 6th Board of Selectmen meeting.

6.4 Acton Health Insurance Trust Report

John Petersen reported on the 11/22/11 meeting, see packet. The Health Insurance Trust (HIT) is preparing a write up for the Town Report. A special meeting was held on 11/30/11 to discuss the HIT's role in the collaborative working group. The Trust will not be an active participant in the group. John attended the recent Minuteman Nashoba Health Group to listen to their discussion of rates for their new plans. MNHG is much bigger than Acton's HIT. HIT will meet again on 12/22/11.

6.5 ALG Report

John Petersen reported on the ALG. Disagreement continues about the amount of reserves to use. Segal did another, different, study on Other Post Employment Benefits (OPEB) and discussion on the topic continues. Consensus at ALG is to put an OPEB placeholder on the spreadsheet but it is too early to include a number. The School Committee wants Fincom to present to them before School Committee decides on a number to set aside for OPEB. A good return on this money is important if money is going to be put aside. A figure of \$500,000 is being discussed for the Town of Acton including APS, to set aside for OPEB, but the Regional School Committee would have to approve its own OPEB trust account. John stated that the sum of those two accounts will be \$500,000 but Don Aicardi disagreed. John advocated for being very precise about this kind of discussion, adding that the use of reserves is another example of confusion in the community. He feels that "net" use of reserves is important. Mike Coppolino said that Jonathan Chinitz did a comprehensive study of cash flow years ago, that may be helpful. Planned replenishment should be discussed, not just variances that create replenishment. Brandy Brandon said that the Fincom is updating Jonathan's study and it will be available soon.

6.6 Acton Finance Committee Report

Xuan Kong reported that Fincom's new Long Range Financial Forecast is impressive. They have institutionalized what the Committee is trying to do and tried to capture the effect of any decisions made. Fincom voted to accept the report and recommend that each entity accept the report as part of their budget planning process. The School Committee asked that the Fincom present their findings and model at the next School Committee meeting. John will ask the Boxborough members if they would like to hear this.

6.7.a FY'13 Budget

Dr. Mills stated that while he has great respect for the Acton Finance Committee, he understands from ALG that the town leaders plan to use \$2 million in reserves for FY13, but the Fincom has changed their opinion from using \$2m to \$1.5m and use \$.5m for OPEB. Dr. Mills is moving ahead with what he feels

is a moderate investment budget, approximately 1% above level service. The Saturday Budget meeting has been moved to January 28th because the state numbers should be out by then.

Dr. Mills addressed Mr. Manning saying that he understands this parent's concern for the Gates school. He referred to JD Head's memo re capital projects. The Douglas roof payments are ending this year, saving \$80,000. While the schools should get some kind of credit for that money for next year, with the FinCom's recommendation to fund OPEB, this may not be possible. Given the larger context of the budget, JD is keeping the capital plan on hold for next year. Dr. Mills said that although it is not ideal that classes are being held in the hallway, given that in a few years student enrollment will drop and several classrooms will open up, it does not make sense to spend money on a modular next year.

Don Aicardi reported on the Review of Reserves FY11 to FY12 slide. Free cash was certified by the Dept of Revenue (DOR) on 12/2/11, the morning after the AB School Committee meeting, resulting in \$500,000 more than his presentation included the night before. The DOR is expected to certify E&D by February 2012.

Right now the FY13 APS level service budget number is a 3.3% change from FY12 (slide 19). The 1/5/12 Joint School Committee meeting will present the preliminary FY13 AB Regional and APS budgets. Nothing is included in these budgets to take into account any of the planned health care design plan changes that may happen. Funding for the classroom assistants is still being reviewed.

Mr. Manning followed up on his question regarding the Gates School, advocating for more classroom space. Marie Altieri explained that enrollment is decreasing by 40 – 60 students per year in recent years. Kindergarten sections could go from 16 to 14 sections in a few years. JD Head said that there is a 1200 square foot difference between the Conant and Gates Schools due to Conant's modular. JD stated that a modular costs \$300,000 - \$400,000 depending on the connector. Xuan Kong noted that Gates was disrupted when art was brought on a cart into different classrooms. A study determined that it did impact learning time. A creative solution was to have art in the lobby, similarly for music class on the stage of the cafeteria. While a modular would be the most straightforward solution, given decreasing enrollment and other financial needs, it may not be the best. JD said that a modular would add \$30,000 annual operational cost.

John Petersen asked for a fleshed out description of adding a modular per JD's information, and the enrollment scenario played out for 3 or 4 years. Assuming these numbers, he asked how the students could be arranged and what costs might be. The Committee discussed doing a study that JD said would cost \$10,000. It was the sense of the Committee that a placeholder should be put on the warrant for this item before the deadline.

6.7.b New FY12 Special Education Preschool Class

Liza Huber reported on a new special education Acton Public Preschool class that is required by law because the children are here with identified needs. This is included in the level service budget. This program began in 1994 and has been extraordinarily successful. The 6 class structure has met our enrollment needs until now. Minuteman Early Intervention in Concord provides services to children from birth to age 3 who are at risk. Referrals come to APS when children are 2.6 years old alerting the district that they will soon be students. The district averages 18 referrals per year for our current early childhood program. From 9/1/10 to 6/30/11, 21 referrals were received. From 6/30/11 to 11/1/11, an additional 11 referrals were received. These children are entitled to services. Immediate changes were required for the remainder of this year for these additional 11 children. Community Ed Director, Erin Bettez was thanked for her flexibility and for giving up some space for next year. Space is being rented from the Acton Children's Center now until the end of this school year. This class is being staffed with a .8 special educator and an Applied Behavior Analysis Trainer. Additional staffing will be needed for next year. These unexpected costs are being offset by circuit breaker funding that has increased and some shifts have been made due to natural attrition in sped assistants. Next year this morning half day program will grow

to a full time model, similar to our current full time ABA program, which has 15 students. There has been a dramatic increase in children with autism spectrum disorders.

Xuan asked if a cost benefit analysis had been done for a program that would serve only those who we are required to accept. Liza Huber said that this had not been done because the program needs to provide peer role modeling. Regular education students (who pay tuition) are needed. It is a very effective model in terms of the most efficient model to have children matriculate into the public schools. Carol Huebner could present the Program to the School Committee. Liza said that other communities have seen a similar increase in students. John Petersen liked Xuan's suggestion of running some numbers. Liza said that our Preschool tuition rate for our typical students is competitive and a sliding scale is available. Some changes may be made. This does generate revenue and we also accept some out of district students who pay tuition. Mike Coppolino stated that the Committee should defer to the professionals as far as the integration piece goes, but the School Committee should look at the numbers. An article about how children are being diagnosed will be distributed to the Committee.

6.8 Capital Budget FY'13

Facilities Director, JD Head requested that the Capital Plan be suspended for the upcoming year. With the exception of 3 roofs, everything else on the plan was completed. John Petersen asked that capital planning include the totality of the buildings including the grounds, parking lots, bike paths, and maximizing pedestrian access on the campus.

6.9 Discussion of Potential Acton Public School Students Tuitioning to Blanchard School

Mike thanked Bruce Sabot for the information that he provided. Dr. Mills said that this is a creative opportunity that is in line with the new Long Range Strategic Plan (student-teacher ratios). There are very small classes in Boxborough's 2nd and 3rd grades while we have large classes in Acton. The Committee agreed that Acton parents should be asked if they would consider this option. It could be mentioned at Kindergarten Night on January 10th. Principals could also ask about it. It is beneficial because Acton students attending Blanchard would already be attending our Regional Junior High and High School. If a student from outside of Acton attends Blanchard, they are permitted to attend our Regional schools for grades 7-12, increasing our class sizes at the region. If a student comes from another town, when they enter the JH or HS, we receive \$5000 from the chapter 70 aid from their town to our town. John Petersen pointed out that the question is whether we are trying to fill empty seats or if it would contribute to overcrowding. He stated that the variable cost is needed to know if this is a good decision or not. Xuan pointed out that the Committee still has the option to add the Choice Program in the future.

6.10 New Ruling by AG: Remote Participation at Open Meetings

- 6.10.1 Email from Assistant Town Manager re Board of Selectmen
- 6.10.2 Amended Open Meeting Law Regulations from the Attorney General, 11/11/11
- 6.10.3 Email from Glenn Koocher, MASC Executive Director
- 6.10.4 Regulations Promulgated by the Attorney General, Relative to Remote Participation at Public Meetings (edited for School Committees), G. Koocher
- 6.10.5 Quick Guide to Remote Participation at School Committee Meetings, Glenn Koocher, 12/9/11

The Acton Board of Selectmen are scheduled to vote on this at their meeting on 12/19/11. John asked Amy Bisiewicz if a demo remote participation could be done at the meeting on 1/5/12. The issues are whether this will be practical and if it can be implemented so all can hear.

6.11 Discussion of Start Time of APS School Committee meetings

After surveying the members, it was the sense of the Committee to start meetings at 7:00 p.m. instead of 7:30. It is expected that the Regional School Committee will continue to start meetings at 7:30.

6.12 Recommendation to Accept Gift to the APS Preschool

It was moved, seconded, and unanimously,

VOTED: to accept this gift of an iPad2 for the APS Preschool with gratitude

FOR YOUR INFORMATION

7.4 Professional Development Day 11/1/11

Deborah Bookis described the staff's Professional Development Day. Some ideas that came out of this event will be shared in the Spring. She said that we know that educators reflect on their work and we ask students to reflect as well, but the staff does not do it collaboratively. This is something they are working on. A group of 30 staff members finished 5 days of protocol training that all will benefit from. The Long Range Strategic Plan dictates that we make decisions based on research and data. This will now be called the "Professional Learning Program". The theme of "It's all about instruction" and "How do we know they're learning?" have kids taking even more ownership of their learning.

7.5 2012-2013 Kindergarten Registration Schedule

Marie Altieri described the upcoming Kindergarten registration process.

7.6 2011-2012 School Systems Profile

Dr. Mills highlighted the many successes found on this profile.

Paul Murphy noted that he recently visited the Conant PTO and they are raising funds for their playground. He urged people to see the Conant PTO website for more information.

NEXT MEETINGS

January 5, 7:30 pm JT SC ABRSC at R.J. Grey Junior High School Library

January 19, 7:30 now at 7:00 pm APSC at R.J. Grey Junior High School Library

REVISED DATE: January 28, 9:00 am – 3:00 pm Joint SC Budget Saturday, RJGJHS Library

Mike wished everyone happy holidays.

The APS School Committee adjourned at 9:51 p.m.

Respectfully submitted,
Beth Petr

List of Documents Used:
Agenda attached

ACTON PUBLIC SCHOOL COMMITTEE MEETING

Library
R.J. Grey Junior High

December 15, 2011
7:00 p.m.

AGENDA with addendum

- 1.0 CALL TO ORDER
- 2.0 CHAIRPERSON'S INTRODUCTION
- 3.0 STATEMENT OF WARRANT
- 4.0 APPROVAL OF MINUTES
 - 4.1 APS SC October 20, 2011 (*addendum*)
 - 4.2 JT SC November 3, 2011
 - 4.3 APS SC November 17, 2011
- 5.0 PUBLIC PARTICIPATION
- 6.0 APS SCHOOL COMMITTEE BUSINESS
 - 6.1 Policy Updates (7:10)
 - 6.1.1 Approved Use of School Facilities Policy (File: KF) with revised procedures and fees (File: KF-R) – *Kim McOsler*
 - 6.1.2 Advertising in Schools (File: KHB) – **SECOND READING – VOTE** – *Marie Altieri*
 - 6.1.2.1 Proposed new policy (approved by ABRSD 12/1/11)
 - 6.1.2.2 Proposed procedures (File: KHB-R)
 - 6.2 2012-2013 School Calendar – **VOTE** – *Steve Mills* (7:20)
 - 6.2.1 Proposed calendar (approved by ABRSC 12/1/11)
 - 6.2.2 Calendar Survey Results Memo from last year
 - 6.3 Update on Health Insurance Plan Design Process – *Kim McOsler* (oral) (7:40)
 - 6.4 Acton Health Insurance Trust Report – *John Petersen* (*addendum*) (7:50)
 - 6.5 ALG Report – *Xuan Kong* (7:55)
 - 6.5.1 12/8/11 meeting materials
 - 6.5.1.1 Draft minutes of 12/8/11 meeting (*added 12/15/11*)
 - 6.6 Acton Finance Committee Report – *Xuan Kong* (8:00)
 - 6.6.1 Long Range Financial Forecast, 12/7/11
 - 6.7.a FY'13 Budget – *Steve Mills, Don Aicardi* (8:10)
 - 6.7.1 Proposed APS FY'13 Budget Schedule
 - 6.7.2 FY'13 Budget Assumptions/Key Decisions
 - 6.7.3 Presentation slides (*revised 12/15/11*)
 - 6.7.b New FY12 Special Education Preschool Class – *Liza Huber* (*addendum*) (8:40)
 - 6.8 Capital Budget FY'13 – *JD Head* (*addendum*) (8:50)
 - 6.9 Discussion of Potential Acton Public School Students Tuitioning to Blanchard School – *S. Mills* (8:55)
 - 6.9.1 Blanchard Memorial School, Seats Available 2012-2013
 - 6.9.2 Acton Public Schools, Class Size Projections – *Marie Altieri* (*addendum*)
 - 6.9.3 Blanchard Brochure
 - 6.10 New Ruling by AG: Remote Participation at Open Meetings – *Mike Coppolino* (9:10)
 - 6.10.1 Email from Assistant Town Manager re Board of Selectmen

- 6.10.2 Amended Open Meeting Law Regulations from the Attorney General, 11/11/11
- 6.10.3 Email from Glenn Koocher, MASC Executive Director (*addendum*)
- 6.10.4 Regulations Promulgated by the Attorney General , Relative to Remote Participation at Public Meetings (edited for School Committees), G. Koocher (*addendum*)
- 6.10.5 Quick Guide to Remote Participation at School Committee Meetings, Glenn Koocher, 12/9/11 (*addendum*)
- 6.10.6 Acton Board of Selectmen scheduled to vote at their meeting 12/19/11 (*oral*)
- 6.11 Discussion of Start Time of APS School Committee meetings – *Mike Coppolino (9:25)*
- 6.12 Recommendation to Accept Gift to the APS Preschool – **VOTE** – *Steve Mills (addendum)(9:35)*

7.0 **FOR YOUR INFORMATION (9:40)**

- 7.1 ESL Student Enrollment Report – December 1
- 7.2 FY'12 Monthly APS Financial Reports (*addendum*)
- 7.3 Student Enrollment Numbers/Class Size Info – December 1 (*addendum*)
- 7.4 Professional Development Day 11/1/11
- 7.5 2012-2013 Kindergarten Registration Schedule (*revised 11/4/11 – Conant & Douglas switched evening meeting dates*)
- 7.6 2011-2012 School Systems Profile (*revised 12/15/11*)
- 7.7 Correspondence from the Community
- 7.8 School Newsletters

Conant Crier:	http://conant.ab.mec.edu/pto/newsletter.html
Douglas Digest:	http://douglas.ab.mec.edu/pto/digest.html
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8.0 **NEXT MEETINGS**

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 January 19, 7:30 pm APSC at R.J. Grey Junior High School Library
REVISED DATE: January 28, 9:00 am – 3:00 pm Joint SC Budget Saturday, RJGJHS Library

ADJOURNMENT (9:50)

APS SCHOOL COMMITTEE ASSESSMENT PRESENTATION

Deborah Bookis,
Director of Curriculum and Instruction

January 19, 2012

Introduction

Assessment is part of Instruction

Introduction

- **Long Range Strategic Plan Goal #2:** Prepare students by providing them with the knowledge, and intellectual and reflective skills they will need to thrive in an increasingly complex world.
- **Strategies:**
 - ▣ Review and articulate what all students should know and be able to do
 - ▣ Determine classroom-based authentic assessments of student learning
 - ▣ Create opportunities for students to monitor their own progress
- **Long Range Strategic Plan Value:** Educational policy and resource decisions informed by research and evidence

Slide 3

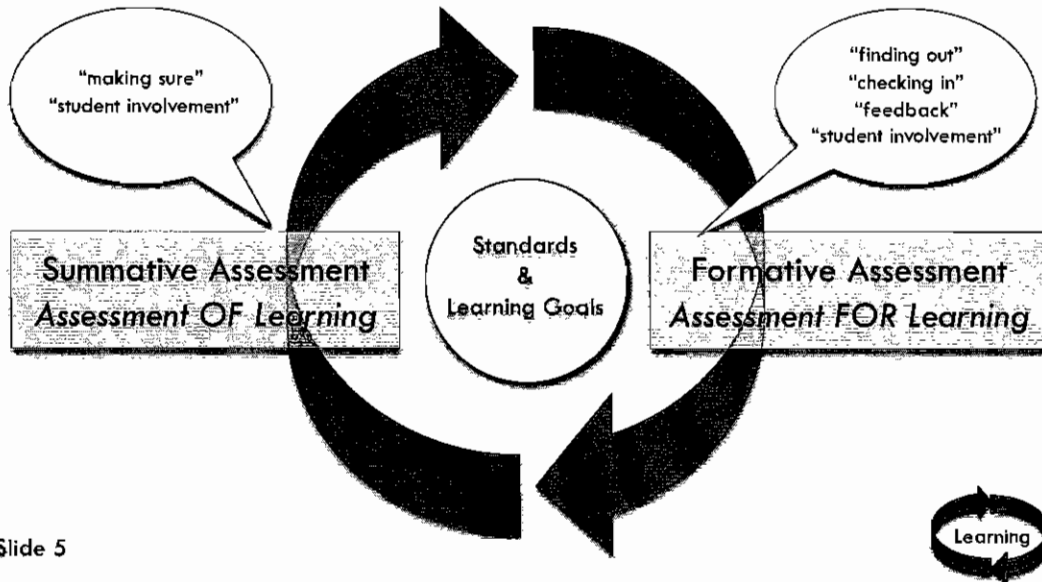
Introduction

- Dr. Priscilla Kotyk and Matt McDowell
APS Assistant Principals
- Eileen Sullivan
APS Elementary Curriculum Specialist
- Jean Oviatt-Rothman
APS Mathematics Curriculum Specialist and Coach
- Noel Erickson
Reading Specialist, Douglas School

Slide 4

Balanced Assessment Program

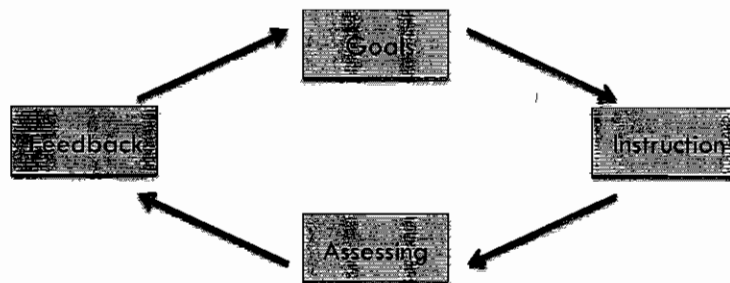
□ Coordinates Formative and Summative Assessment



Slide 5

Balanced Assessment Program

Formative Assessment: Formative assessment is a PROCESS used by teachers and students DURING instruction that provides FEEDBACK to ADJUST ongoing teaching and learning to IMPROVE students' ACHIEVEMENT on intended instructional outcomes. (Popham, 2008).

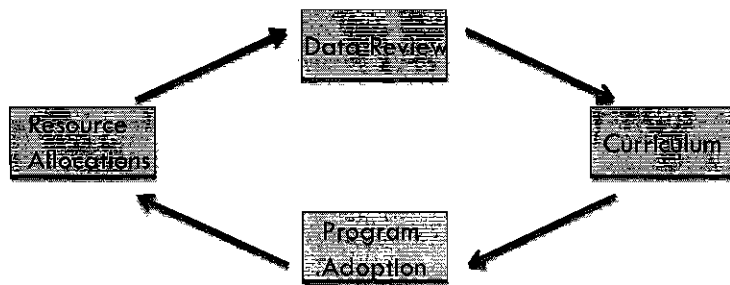


Slide 6



Balanced Assessment Program

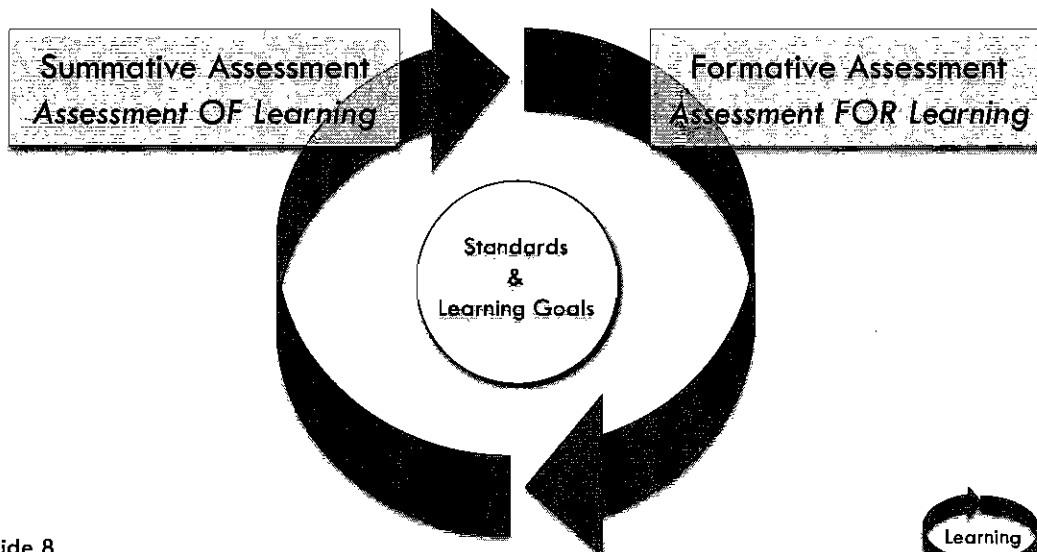
Summative Assessment: Summative assessment is the formal assessment done at the END of units of learning for GRADING PURPOSES primarily, and secondly, for providing learning and ACHIEVEMENT FEEDBACK (Moore, 1998).



Slide 7



Balanced Assessment Program



Slide 8





Science and Social Studies

- Science and Social Studies assessments include a wide variety:
 - ◆ Teacher observations and class discussions (F)
 - ◆ Written assessments (F, S)
 - ◆ Performance Assessments (F, S)
 - ◆ Embedded assessments (F, S)
 - ◆ Mid- and end-of-unit self- assessments (F, S)

Slide 9

Teachers assess *practices* as well as *content* in Science, Engineering, and History/Social Science

Think/Work like a Scientist/Engineer

- Ask a question/define a problem
- Plan/carry out investigations/ tests
- Differentiate between observation and inference
- Analyze and interpret data
- Construct explanations/solutions using evidence
- Engage in argument using evidence

Think/Work like a Social Scientist

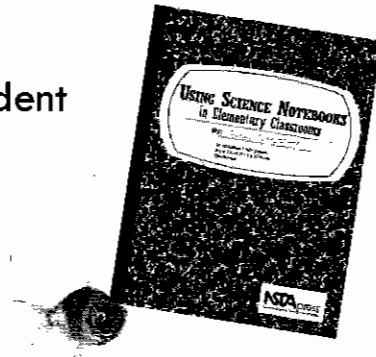
- Ask questions
- Distinguish primary from secondary sources
- Differentiate between observation and inference
- Identify "Point of View"
- Engage in argument using evidence
- Analyze maps, artifacts, images

Slide 10



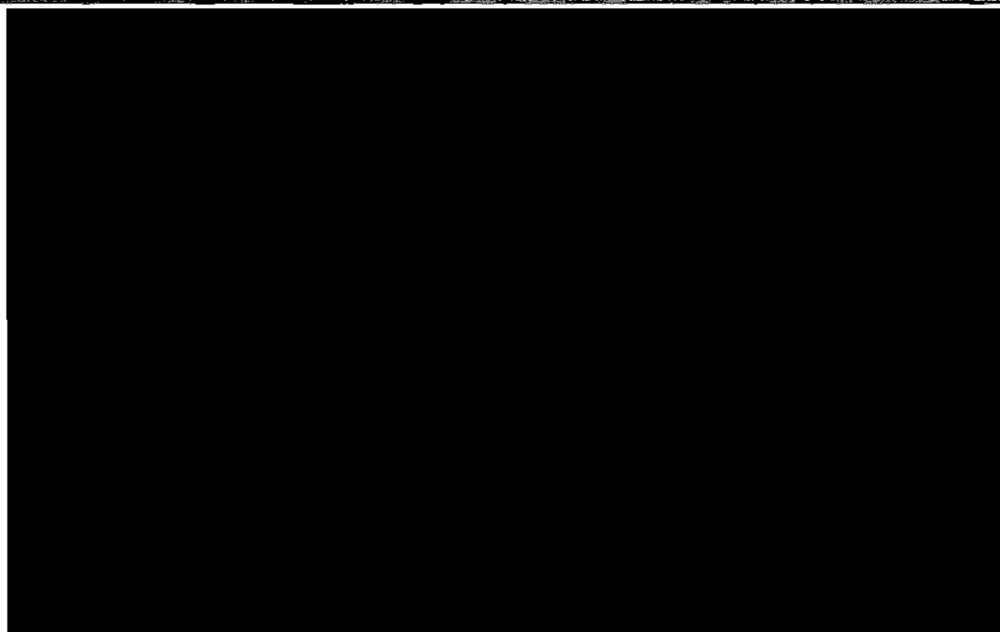
Science Notebooks as Assessment

- ▣ Students respond to prompts, enter observations, include labeled drawings, charts, tables, self-reflections, questions, etc.
- ▣ Notebooks are “mined” for data as units progress.
- ▣ Teachers give written feedback in notebooks
- ▣ Science work uses the lens of “Claims and Evidence” to focus student understandings.



Slide 11

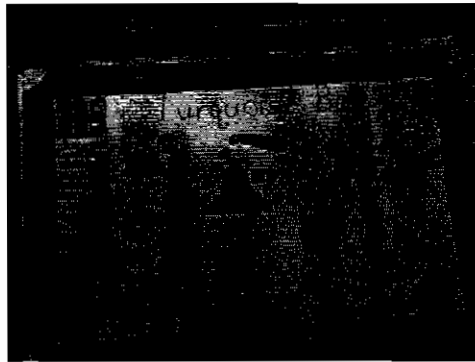
Scientist's Notebooks



Slide 12

Science and Social Studies assessments often integrate ELA skills (Embedded Assessment)

- Non-fiction reading supports and expand students' understanding of content.
- This story map illustrates the student's understanding of a story and also demonstrates their map-making skills.



Slide 13

Embedded Assessments Electric Circuits - Wiring the House



Slide 14

Science and Social Studies assessments build on knowledge developed throughout the unit.



Concept Wall leads to
conceptual development

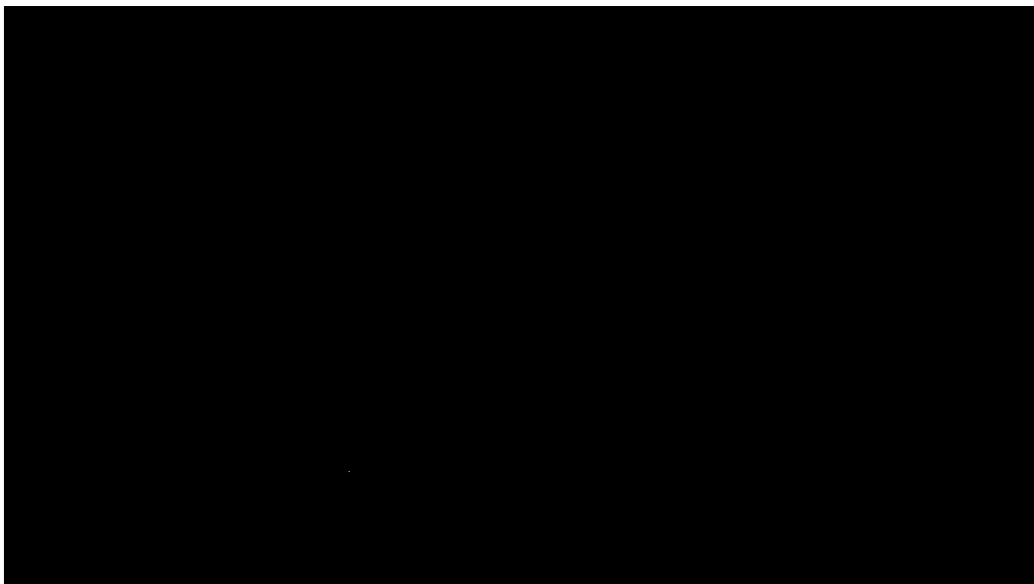
Questions

Class
map

Individual
map (S)

Slide 15

Formative Assessment in 6th Grade Science: Building Bridges



Slide 16



Advantages and Challenges

Advantages

- Performance-based assessments require students to apply knowledge.
- Self-assessments are very instructive for the teacher (both mid-and end-of-unit).
- Written work can confirm/question group work.

Challenges

- Performance-based assessments are time-consuming.
- Group work requires planning.
- ELA skills can limit student demonstration of learning.

Slide 17

Assessing Mathematics Concepts

- Kathy Richardson's Assessing Math Concepts (AMC) is a series of Formative Assessments
 - Used in conjunction with each math program's assessment systems
 - Focused on the development of core mathematical concepts
 - Individual one-on-one assessment interviews between student and teacher

Slide 18



Assessing Math Concepts (AMC)

“Number concepts are the foundation that children must have in order to achieve high standards in mathematics as a whole.”

-Kathy Richardson

Counting

Number Relationships

Number Composition and Decomposition

**Place Value and the Structure of the Base-Ten
Number System**

Slide 19



Assessing Math Concepts (AMC)

- ☐ Not focused only on a child's ability to get the correct answers

“When children learn only to follow procedures without understanding the underlying mathematics, what they are doing is empty of mathematics.”

-Kathy Richardson

Slide 20



Assessing Math Concepts (AMC)

- Helps identify where understanding is breaking down and why
 - Utilized by teachers in grades K-1 to plan and inform instruction and identify early intervention needs
 - Utilized by math specialist and math assistants to identify children in need of intervention at all grade levels
- Provides evidence of learning and growth

Slide 21



AMC *Anywhere* Kindergarten Pilot

- Online program for recording, reporting, and tracking data from AMC Assessments
- Used by all Kindergarten teachers 2011-2012
- Interest in continuing for Grade 1 during 2012-2013

Slide 22



AMC Anywhere in Action



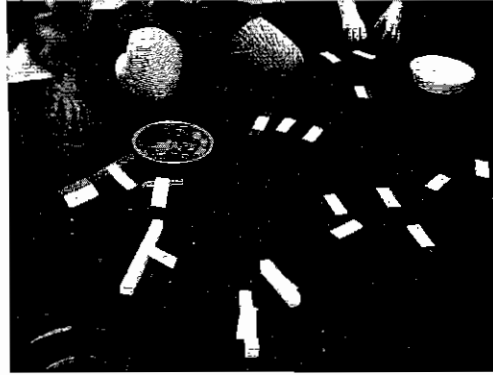
Slide 23

AMC Anywhere Class Instruction Report: Kindergarten Counting Assessment

		Counting an Unorganized Pile to				
		4	7	12	21	32
Working on Numbers to 12						
	10/18/2011		A	P	P	
Working on Numbers to 21						
	10/20/2011		A		I	
	12/21/2011		A		P	
	12/20/2011		A		P	
	10/20/2011		A		P	
	12/20/2011		A		P	
	10/20/2011		A		P	
Working on Numbers to 32						
	12/21/2011				A	P
	10/18/2011				A	P
	12/21/2011				A	P
	12/21/2011				A	P
Ready to Apply						
	12/20/2011					A
	12/21/2011					A
	10/20/2011				A	A
	12/23/2011				A	A
	10/20/2011					A

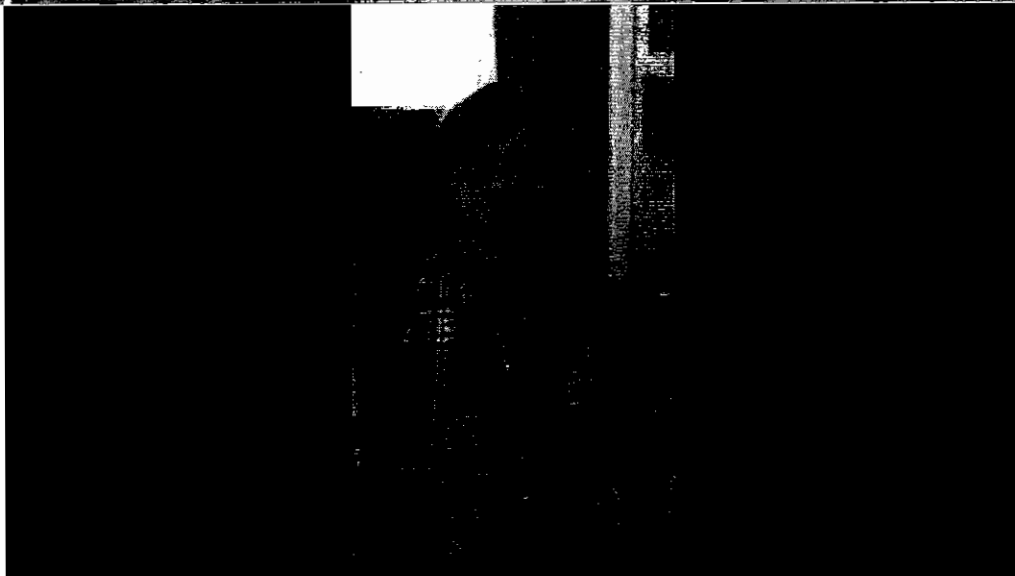
Slide 24

Assessment Guides Instruction



Slide 25

The Formative Assessment Cycle



Cheryl Beaudoin, McCarthy-Towne Kindergarten Teacher

Slide 26

Assessing Math Concepts (AMC)

ADVANTAGES

- ◆ Individualized assessment
- ◆ Assesses understanding of foundational concepts
- ◆ Not specific to a single program or grade level
- ◆ Provides flexibility to assess all students
- ◆ Drives instruction and targets interventions

CHALLENGES

- ◆ Time consuming to administer to all students
- ◆ Teachers must be trained to utilize effectively
- ◆ Classroom management while teacher works one-on-one

Slide 27



MCAS at School Level

- MCAS Data is Summative Assessment Data
- Shared in a Wide Variety of Ways:
 - Classroom Teachers – Individual and Grade Level
 - Special Education Teachers
 - Counselors
- ISSP – Individual Student Success Plan
- Data Analysis Similar Review Process

Slide 28

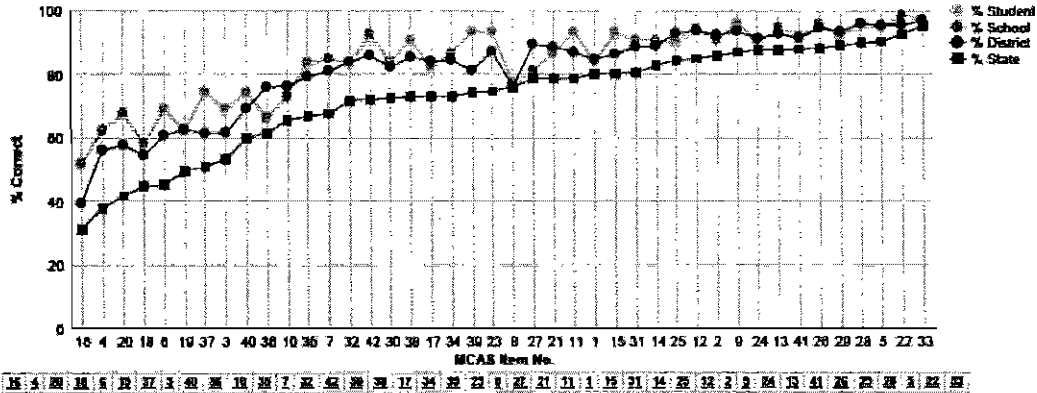


MCAS Reports



Student Item Analysis Graph Action - 2011 MCAS Grade 4 Mathematics

Instructional Group: Students Included: 75



Slide 29



MCAS School Item Analysis



School Item Analysis Action, 2011 MCAS Grade 4 Mathematics

Students Included: On or after Oct 1 (74)

Standard	Topic	Standard	Type	Item	Percent of School's Total Student Responses														Avg Pts
					% School	% District	% State	School-State Diff	% Blank	% A	% B	% C	% D	% 0	% 1	% 2	% 3	% 4	
Data Analysis, Statistics, and Probability	Data Collection	4.D.1	MC	9	92	93	87	5		92	5	3							
Data Analysis, Statistics, and Probability	Inferences and Predictions	4.D.3	MC	11	91	87	78	13		3	1	81	5						
Data Analysis, Statistics, and Probability	Inferences and Predictions	4.D.3	MC	11	89	89	80	9											
Data Analysis, Statistics, and Probability	Inferences and Predictions	4.D.3	MC	28	91	95	90	1											
Data Analysis, Statistics, and Probability	Inferences and Predictions	4.D.3	MC	22	92	95	92	0											
Data Analysis, Statistics, and Probability	Inferences and Predictions	4.D.3	MC	27	91	89	78	13											
Data Analysis, Statistics, and Probability	Probability	4.D.4	MC	13	96	93	87	9		1	1	96	1						
Data Analysis, Statistics, and Probability	Probability	4.D.5	MC	19	80	76	65	15		5	80	12	3						
Data Analysis, Statistics, and Probability	Probability	4.D.6	MC	12	86	87	80	6		88	12	1							
Data Analysis, Statistics, and Probability	Probability	4.D.8	SA	5	99	95	90	8						1	99				0.99
Data Analysis, Statistics, and Probability	Statistical Methods	4.D.2	MC	33	95	97	95	0											
Geometry	Properties of Shapes	4.G.1	CR	36	92	92	72	10						1	9	11	27	55	3.90
Geometry	Properties of Shapes	4.G.5	MC	8	76	76	76	-6		79	5	20	4						
Geometry	Transformations and Symmetry	4.G.8	SA	17	86	84	73	13						19	86				0.86
Measurement	Techniques and Tools	4.M.3	MC	40	70	70	59	11											
Measurement	Techniques and Tools	4.M.4	CR	18	91	91	84	16						9	96	22	30	23	2.43
Measurement	Techniques and Tools	4.M.5	MC	25	97	94	84	13											
Measurement	Techniques and Tools	4.M.5	SA	37	62	87	90	12						30	62				0.62

Slide 30



Reading

“The most useful information for teachers is assessment information gathered in the course of daily classroom routines. The purpose of this assessment is to improve instruction and help students become better readers and writers.”

Kathryn Au
Professor of Education
University of Hawaii

Slide 31



Benchmark Reading Assessments

- Fountas & Pinnell Benchmark Assessment



- The Developmental Reading Assessment (DRA)



- PM Ultra Benchmark Kit (Rigby)



Slide 32



Purpose

- ❑ To determine to what extent all students are progressing
- ❑ To inform curriculum and instruction in order to determine what learning comes next for students
- ❑ Track student growth

Slide 33



Reading Skills Assessed

- ❑ Reading Accuracy
- ❑ Fluency
- ❑ Comprehension

Slide 34



Developmental Reading Assessment

Interpretation Performance Level: 2
Some understanding of important text implications; no supporting details

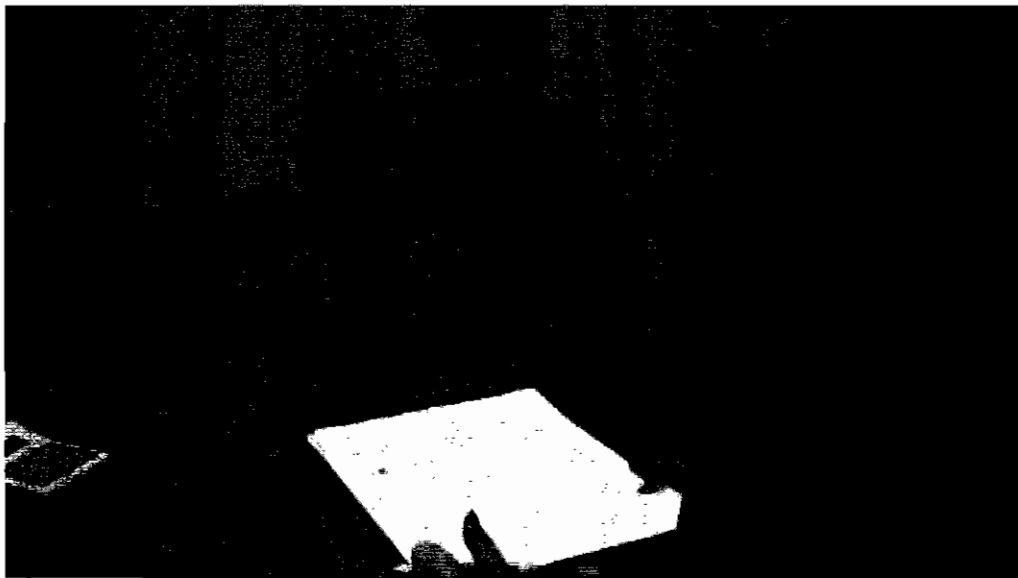
Interpretation Model
how to infer during shared reading and read-alouds

Determine Performance Level
The teacher circles statements on the DRA2 Continuum that describe the student's reading behaviors. Based on the selected statements, student performance is determined to be Emerging/Intervention, Developing/Instructional, Independent, or Advanced.

Complete the Focus for Instruction
The teacher then uses the DRA2 Focus for instruction to determine the student's instructional path.

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Fountas & Pinnell Demonstration



Slide 36

Additional Literacy Assessments

- Words Their Way Spelling Inventory
- Phonics, Word Analysis, and Vocabulary assessments
- Marie Clay: An Observation Survey for emergent readers - Kindergarten

Slide 37



Professional Learning

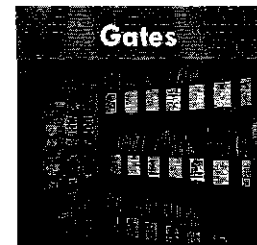
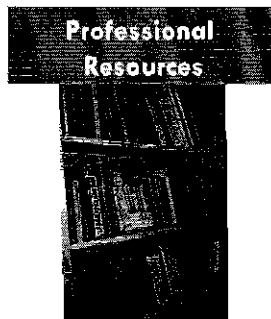
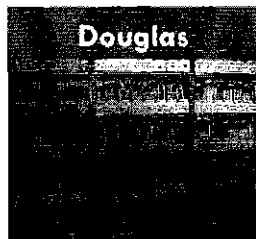
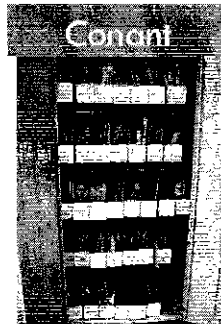
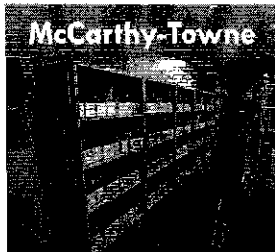
- Guided Reading Consultant
- Running Records Workshop
- Annenberg Course: Teaching Reading 3-5 Workshop
- School based professional learning
- Graduate Reading course taught by a Salem State professor



Slide 38



Leveled Reading Libraries & Professional Resources



Slide 39

Advantages & Challenges

□ Advantages

- ▣ Individualized Assessment
- ▣ Tracks student growth
- ▣ Assesses reading behaviors and level
- ▣ Drives effective instruction and targeted intervention

□ Challenges

- ▣ Time consuming to administer to all students
- ▣ Classroom management while teacher works one-on-one with students

Slide 40



Writing and Other

- Rubrics for writing
- Portfolios: Writing, Visual Arts, Achievement
- How used determines formative or summative
- Advantages:
 - ▣ Evidence of growth over time/documentation of learning
 - ▣ Invites reflection
- Challenges:
 - ▣ Organization and storage (including digital evidence)
 - ▣ Time

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Closing

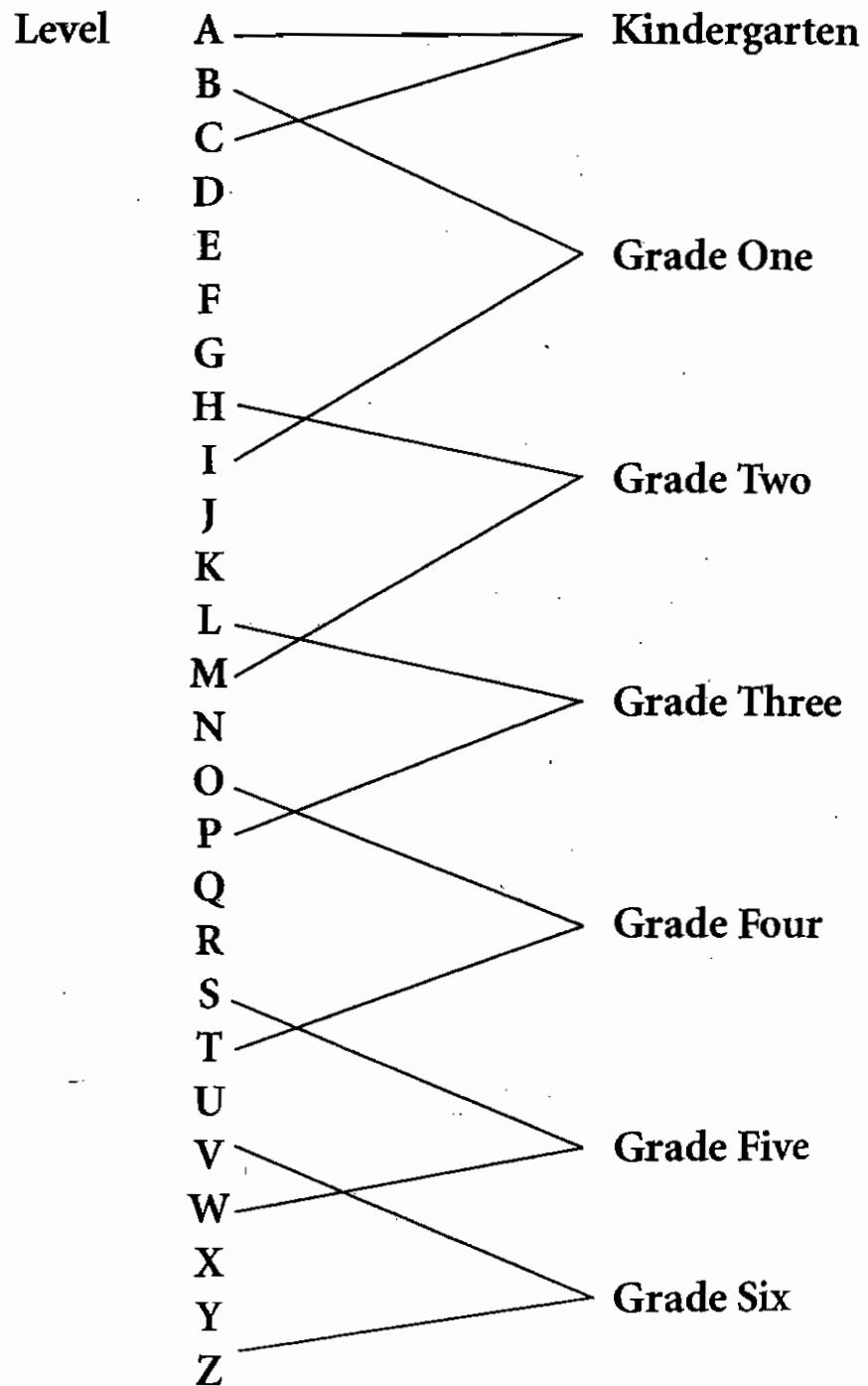
Questions and Answers

Slide 42

Reading Level Correlation Chart

Grade Level	Reading Recovery	Fountas-Pinnell Guided Reading	DRA	Basal Equivilant	Lexile Levels	
Kindergarten	A, B	A	A	Readiness		
	1		1			
	2	B	2	PrePrimer 1		
	3	C	3			
4			4	PrePrimer 2		
Grade 1	5	D	6			
	6					
	7	E	8	PrePrimer 3		
	8					
	9	F	10	Primer		
	10					
	11	G	12			
	12					
	13	H	14	Grade 1	200-299	
	14					
	15	I	16			
	16					
	Grade 2	18	J, K	20	Grade 2	300-399
20		L, M	28	400-499		
Grade 3	22	N	30	Grade 3	500-599	
			34			
	24	O, P	38		600-699	
Grade 4	26	Q, R, S	40	Grade 4	700-799	
Grade 5	28	T, U, V	44	Grade 5	800-899	
Grade 6	30	W, X, Y		Grade 6	900-999	
Grade 7	32	Z		Grade 7	1000-1100	
Grade 8	34	Z		Grade 8		

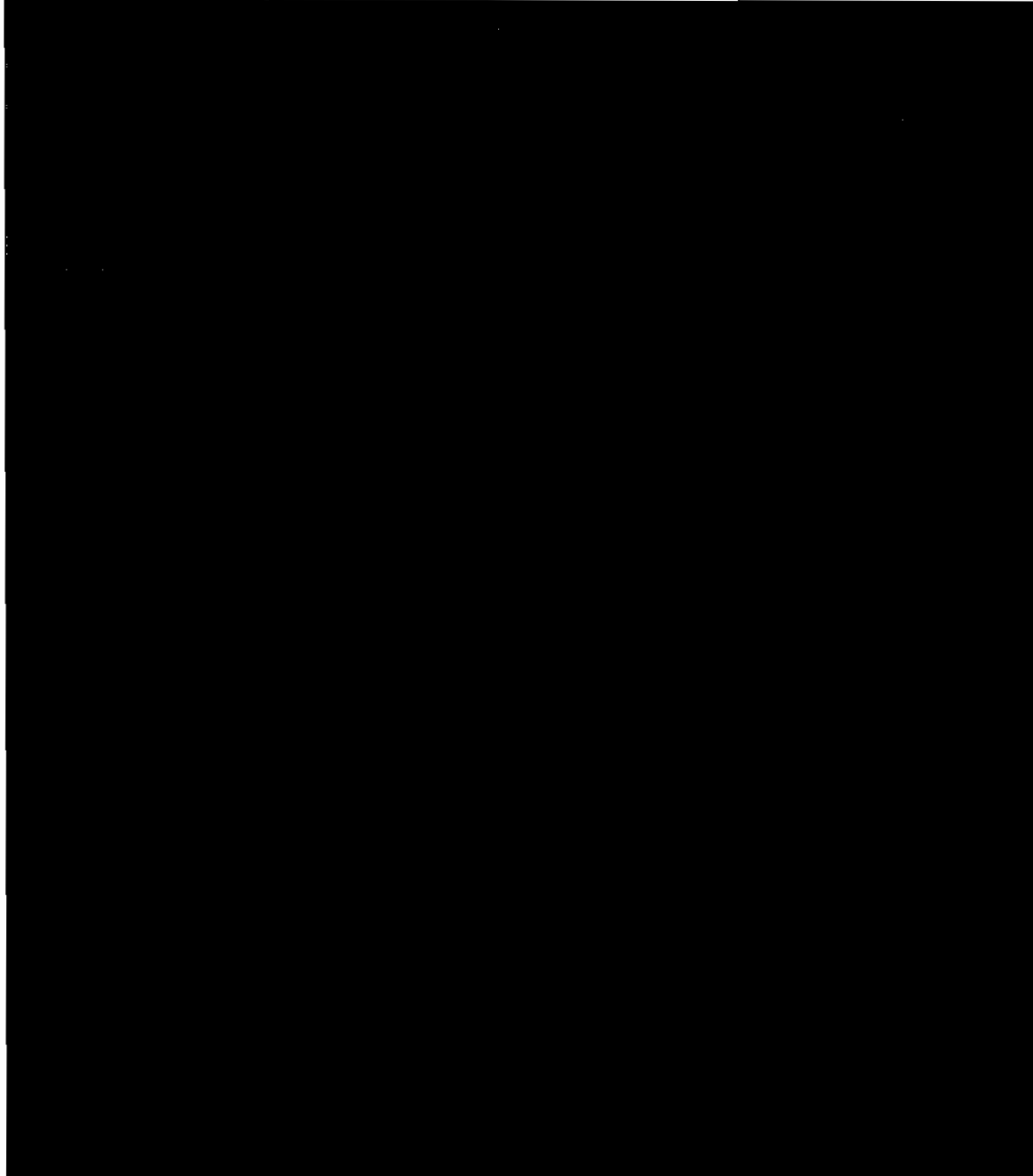
Text Gradient



Guided Reading Level Chart

Grade Level	Fountas and Pinnell Levels	DRA 2 Levels
1	D	6
1	E	8
1	F	10
1	G	12
1	H	14
1 - 2	I	16
2	J	18
2	K	20

2	L	24
2 - 3	M	28



Name/Date _____

Teacher/Grade _____

DRA2 BRIDGE CONTINUUM

	INTERVENTION	INSTRUCTIONAL	INDEPENDENT	ADVANCED
Reading Engagement				
Wide Reading	1 Title(s) below grade level; limited reading experiences and book knowledge	2 2–3 titles slightly below grade level; some reading experiences	3 At least 4 titles from 2–3 genres or multiple books from 1 genre; generally on-grade-level texts	4 Wide variety of titles across 3 or more genres; many on- and above-grade-level texts
Self-Assessment/Goal Setting	1 No strengths and/or goals related to the reading process; no real plan	2 General strengths and goals (e.g., read more); general plan	3 At least 1 specific strength and goal related to the reading process; relevant plan	4 2–3 specific strengths and goals related to the reading process; 2–3-step plan
Score	2 3	4 5	6 7	8
Oral Reading Fluency				
Expression	1 Monotone; very little expression	2 Some expression that conveys meaning	3 Expression reflects mood, pace, and tension at times	4 Expression reflects mood, pace, and tension most of the time
Phrasing	1 Mostly word-by-word	2 Inappropriate pauses; shorter phrases most of the time	3 Generally appropriate pauses; heeds most punctuation; longer, meaningful phrases most of the time	4 Appropriate pauses; heeds all punctuation; consistently longer, meaningful phrases
Rate	1 64 WPM or less	2 65–79 WPM	3 80–115 WPM	4 116 WPM or more
Accuracy	1 94% or less	2 95%	3 96%–98%	4 99%–100%
Score	4 5 6	7 8 9 10	11 12 13 14	15 16
Comprehension				
Use of Text Features	1 Very little or no description of the setting and character(s)	2 Partial description of the setting and/or character(s); general statements	3 Accurate description of setting and character(s) with some specific details	4 Effective description of the setting and characters with specific details
Questioning/Prediction	1 Unrelated predictions or no response	2 At least 1 reasonable prediction related to the text	3 At least 2 reasonable predictions that go beyond the text read aloud	4 3 thoughtful predictions that go beyond the text read aloud
Scaffolded Summary	1 1–2 events in own language and/or copied text; may include incorrect information	2 Partial summary; generally in own language; some important characters/events; may include misinterpretations	3 Summary in own language; includes most of the important characters' names, some details, and many of the important events in sequence from the beginning, middle, and end	4 Well-organized summary in own language; includes all important characters' names, specific details, and all important events from the beginning, middle, and end
Literal Comprehension	1 Little information from the text and/or incorrect information	2 Partial information from the text; may include misinterpretation	3 Information from the text that accurately responds to question(s) or prompt(s)	4 All important information from the text that effectively responds to question(s) or prompt(s)
Interpretation	1 Limited or no understanding of important text implication(s)	2 Partial understanding of important text implication(s); little or no detail	3 Understands important text implication(s); relevant supporting details	4 Insightful understanding of important text implication(s); important supporting details
Reflection	1 Insignificant or unrelated message or event; no reason for opinion or no response	2 Less significant message or event and general reason(s) for opinion	3 Significant message or event and a relevant reason for opinion	4 Significant message or event and reason(s) for opinion that reflect higher-level thinking
Score	6 7 8 9 10 11	12 13 14 15 16	17 18 19 20 21 22	23 24

Choose three to five learning/teaching activities on the *DRA2* Focus for Instruction on the next page.

DRA2 FOCUS FOR INSTRUCTION**READING ENGAGEMENT****Wide Reading**

- ☐ Teach student strategies to select appropriately leveled texts for independent reading
- ☐ Introduce student to reading materials from a variety of genres and purposes
- ☐ Teach strategies to build reading stamina
- ☐ Create structures and/or routines to support reading at home
- ☐ Develop and monitor clear expectations for amount of independent reading
- ☐ Teach student how to use a reading log to monitor book selection and set reading goals

Self-Assessment/Goal Setting

- ☐ Model and discuss strategies good readers use
- ☐ Help student identify 1–2 reading goals and a plan of action to improve reading
- ☐ Support revision of ongoing reading goals

ORAL READING FLUENCY**Expression and Phrasing**

- ☐ Model and teach reading in longer, meaningful phrases with appropriate expression
- ☐ Have student practice appropriate expression with familiar texts
- ☐ Have student participate in choral reading and/or reader's theater
- ☐ Teach student to heed punctuation

Rate

- ☐ Provide materials and time for repeated readings and timed readings to increase reading rate
- ☐ Give opportunities for student to read lower-level and/or familiar texts at an appropriate rate

Accuracy: Word Analysis

- ☐ Support and reinforce self-corrections of miscues
- ☐ Model and support how to take words apart (e.g., onset and rime, syllables) to problem-solve unknown words
- ☐ Teach how to use word chunks and analogies to problem-solve unknown words
- ☐ Provide spelling activities and word sorts to help student recognize patterns in words

COMPREHENSION**Use of Text Features**

- ☐ Provide opportunities for student to discuss what he or she knows about the characters based on title and book cover, as well as opening paragraphs and texts read aloud
- ☐ Teach student how to describe characters using information from fiction text features (e.g., title, illustrations, and text)

Questioning/Prediction

- ☐ Provide opportunities for student to discuss what he or she knows about the characters and setting based on title and book cover, as well as opening paragraphs and illustrations of texts read aloud
- ☐ Teach how to make and confirm predictions prior to and during reading
- ☐ Model and support using background information to make meaningful predictions
- ☐ Model and support using knowledge of text structures/genre characteristics to make predictions

Scaffolded Summary

- ☐ Share and identify characteristics of good summaries
- ☐ Model and co-construct written summaries of texts read aloud
- ☐ Model and support how to distinguish between more important and less important ideas and details
- ☐ Model and support how to write a summary in one's own words
- ☐ Teach student how to use a graphic organizer as an aid to creating a summary
- ☐ Teach student how to identify story elements (e.g., characters, setting, plot)
- ☐ Provide time for student to practice oral and written summaries

Literal Comprehension

- ☐ Show student how to use key words to identify specific information from the text
- ☐ Provide opportunities for student to answer and construct literal questions
- ☐ Help student locate and record specific details
- ☐ Teach student how to use and construct graphic organizers to keep track of story information

Interpretation

- ☐ Teach and share examples of inferences
- ☐ Model and teach students how to think about *Why?* questions while and after reading a text
- ☐ Model and teach how to support inferences with examples from the text
- ☐ Give student opportunities to respond to and construct inference questions orally and in writing

Reflection

- ☐ Help student identify important information and/or key vocabulary in a variety of texts
- ☐ Provide opportunities to identify and discuss the most significant message or event in a story
- ☐ Provide opportunities to discuss theme/most important idea of stories read aloud
- ☐ Demonstrate and teach student how to support opinion with details from the text





























OTHER

AMC Anywhere™ - Class Instruction Report

Counting Objects - Task 1

Teacher:

Date Range: 08/01/2011 - 01/12/2012

Counting Objects - Task 1: Counting an Unorganized Pile						
		Counting an Unorganized Pile to				
Student	Date	4	7	12	21	32
Working on Numbers to 12						
	01/03/2012				I-	
Working on Numbers to 21						
	12/06/2011					I-
	12/07/2011					P
	12/15/2011					P
Working on Numbers to 32						
	12/23/2011					
	10/25/2011					
	01/05/2012					
	12/06/2011					
Ready to Apply						
	12/07/2011					
	12/15/2011					
	10/13/2011					
	10/13/2011					
	10/14/2011					
	01/03/2012					
	12/07/2011					
	12/07/2011					
	10/25/2011					
	10/19/2011					
	10/19/2011					
	12/15/2011					

APS MCAS 2011

Conant

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/ Failing		Students Included	CPI SGP	Included In SGP
	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE			
GRADE 03 - READING	87	61	25	11	62	50	9	30	4	9	68	94.1	N/A
GRADE 03 - MATHEMATICS	90	66	25	14	65	52	6	25	4	10	68	95.2	N/A
GRADE 04 - ENGLISH LANGUAGE ARTS	71	53	15	10	58	43	22	35	7	12	72	88.5	69.5
GRADE 04 - MATHEMATICS	65	47	34	15	31	32	30	42	6	11	71	88.6	82.0
GRADE 05 - ENGLISH LANGUAGE ARTS	88	57	37	17	51	50	10	24	1	9	70	95.7	53.0
GRADE 05 - MATHEMATICS	80	59	44	25	36	34	16	26	4	15	70	91.4	63.0
GRADE 05 - SCIENCE AND TECH/ENG	83	50	23	14	60	36	16	36	1	15	70	93.6	N/A
GRADE 06 - ENGLISH LANGUAGE ARTS	88	68	47	17	41	51	8	23	4	9	74	95.3	56.0
GRADE 06 - MATHEMATICS	93	58	73	26	20	32	5	25	1	16	74	97.6	82.0
ALL GRADES - ENGLISH LANGUAGE ARTS	83	69	31	17	52	52	12	23	4	8	284	93.4	58.5
ALL GRADES - MATHEMATICS	82	58	45	24	37	34	14	27	4	15	283	92.8	68.0

Douglas

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/ Failing		Students Included	CPI SGP	Included In SGP
	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE			
GRADE 03 - READING	89	61	18	11	71	50	12	30	0	9	68	96.3	N/A
GRADE 03 - MATHEMATICS	81	66	32	14	49	52	18	25	1	10	68	93.4	N/A
GRADE 04 - ENGLISH LANGUAGE ARTS	76	53	13	10	63	43	24	36	0	12	75	93.3	53.5
GRADE 04 - MATHEMATICS	76	47	34	15	42	32	24	42	0	11	74	92.8	71.0
GRADE 05 - ENGLISH LANGUAGE ARTS	92	67	36	17	56	50	8	24	0	9	73	97.3	69.0
GRADE 05 - MATHEMATICS	90	58	53	25	37	34	8	26	1	15	73	96.2	73.0
GRADE 05 - SCIENCE AND TECH/ENG	82	50	34	14	48	36	16	36	1	15	73	92.8	N/A
GRADE 06 - ENGLISH LANGUAGE ARTS	93	68	32	17	61	51	7	23	0	8	74	98.3	43.0
GRADE 06 - MATHEMATICS	94	58	59	26	35	32	4	25	1	16	74	97.3	71.5
ALL GRADES - ENGLISH LANGUAGE ARTS	87	69	25	17	62	52	13	23	0	8	290	96.3	57.0
ALL GRADES - MATHEMATICS	85	58	45	24	40	34	13	27	1	15	289	95.0	71.0

Gates

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/ Failing		Students Included	CPI SGP	Included In SGP
	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE			
GRADE 03 - READING	80	61	17	11	63	50	19	30	1	9	70	93.6	N/A
GRADE 03 - MATHEMATICS	86	66	20	14	66	52	14	25	0	10	70	96.1	N/A
GRADE 04 - ENGLISH LANGUAGE ARTS	80	53	25	10	55	43	13	35	7	12	75	90.0	71.0
GRADE 04 - MATHEMATICS	76	47	44	15	32	32	21	42	3	11	75	91.3	82.0
GRADE 05 - ENGLISH LANGUAGE ARTS	94	67	49	17	45	50	4	24	1	9	73	97.3	74.0
GRADE 05 - MATHEMATICS	88	59	52	25	36	34	11	26	1	15	73	95.5	66.0
GRADE 05 - SCIENCE AND TECH/ENG	79	50	42	14	37	36	18	36	3	15	73	92.8	N/A
GRADE 06 - ENGLISH LANGUAGE ARTS	93	68	39	17	54	51	6	23	1	9	72	97.6	64.0
GRADE 06 - MATHEMATICS	89	58	65	26	24	32	11	25	0	16	72	95.5	75.0
ALL GRADES - ENGLISH LANGUAGE ARTS	87	69	33	17	54	52	10	23	3	8	290	94.6	69.0
ALL GRADES - MATHEMATICS	85	58	46	24	39	34	14	27	1	15	290	94.6	74.0

APS MCAS 2011

McCarthy-Towne

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/ Failing		Students Included	CPI SGP	Included in SGP
	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE			
GRADE 03 - READING	74	61	17	11	57	50	23	30	3	9	70	90.7	N/A
GRADE 03 - MATHEMATICS	73	66	19	14	54	52	26	25	1	10	70	91.1	N/A
GRADE 04 - ENGLISH LANGUAGE ARTS	64	53	13	10	51	43	31	35	6	12	71	86.3	49.0
GRADE 04 - MATHEMATICS	60	47	13	15	47	32	36	42	4	11	72	85.1	38.0
GRADE 05 - ENGLISH LANGUAGE ARTS	87	67	23	17	64	50	11	24	3	9	74	94.3	45.5
GRADE 05 - MATHEMATICS	74	59	39	25	35	34	20	26	5	15	74	88.9	47.5
GRADE 05 - SCIENCE AND TECH/ENG	65	50	18	14	47	36	30	36	5	15	74	85.8	N/A
GRADE 06 - ENGLISH LANGUAGE ARTS	84	68	24	17	60	51	9	23	7	9	75	94.0	47.0
GRADE 06 - MATHEMATICS	72	58	40	26	32	32	19	25	9	16	75	88.3	76.0
ALL GRADES - ENGLISH LANGUAGE ARTS	77	69	19	17	58	52	18	23	4	8	290	91.4	47.0
ALL GRADES - MATHEMATICS	70	58	28	24	42	34	25	27	5	15	291	88.3	50.5

Merriam

Grade and Subject	Proficient or Higher		Advanced		Proficient		Needs Improvement		Warning/ Failing		Students Included	CPI SGP	Included in SGP
	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE	SCHOOL	STATE			
GRADE 03 - READING	86	61	18	11	68	50	11	30	3	9	66	95.1	N/A
GRADE 03 - MATHEMATICS	94	66	42	14	52	52	5	25	2	10	66	98.5	N/A
GRADE 04 - ENGLISH LANGUAGE ARTS	72	53	5	10	67	43	25	35	3	12	75	89.0	36.0
GRADE 04 - MATHEMATICS	79	47	26	15	53	32	20	42	1	11	74	82.9	61.5
GRADE 05 - ENGLISH LANGUAGE ARTS	78	67	28	17	50	50	21	24	1	9	72	93.1	54.0
GRADE 05 - MATHEMATICS	86	59	60	25	26	34	10	26	4	15	72	94.1	74.0
GRADE 05 - SCIENCE AND TECH/ENG	63	50	25	14	38	36	35	36	3	15	72	85.4	N/A
GRADE 06 - ENGLISH LANGUAGE ARTS	93	68	35	17	58	51	4	23	3	9	98	96.7	54.0
GRADE 06 - MATHEMATICS	89	58	52	26	37	32	6	25	5	16	97	94.3	61.0
ALL GRADES - ENGLISH LANGUAGE ARTS	83	69	23	17	60	52	14	23	3	8	311	93.6	50.0
ALL GRADES - MATHEMATICS	86	58	45	24	41	34	10	27	3	15	309	94.8	64.0

Acton Health Insurance Trust Report

John Petersen

The Trust met on December 22nd, 2011

- Approved management discussion for the FY11 Audit.
- Approved HIT report for Town of Acton annual report.
- Cook & Co. FY12 Cash Flow Report (Jan) shows that the trust has a negative cash flow of \$110K ytd, -1% (this is net of amounts that are due from reinsurance, \$490K, and ERRP, \$110K).
- The merits of updating the HIT bylaws were discussed. No action is recommended at present due to unknowns associated with health care plan design changes.
- The trustees will consider an annual benchmarking of health insurance plan design(s) offered by the trust against the Chapter 69 state benchmark that will be published each June.

Robert Evans provided an overview of the Health Insurance Trust to the collaborative working group on December 28th.

Next Meeting: January 26th, 2012 at 8 a.m.



Acton Leadership Group Meeting

January 12, 2012

5:00 PM

Town Hall, Faulkner Hearing Room 204

Bart Wendell Facilitating

----- Agenda Topics -----

Comments

----- Agenda Topics -----		
		<u>Comments</u>
1. Approve Minutes of December 8, 2011	General Discussion	
2. Review FY 13 Plan	Town and School Staff will present Plan	Reach Consensus on: 1) Reserve Assumptions 2) Expense Assumptions and Split 3) OPEB 4) Revenue Use
3. Update on Regional School Status	Xuan Kong	
4. Update on Minuteman Regional	Dore' Hunter	
5. Public Comments	ALL	
6. Next Meetings: January 26, 2012 (Tentative) February 9 and 28 March 8 and 22 (Tentative)		
7. Adjourn		

ALG Minutes 12/08/11 draft # 3)

Present: Bart Wendell, facilitator; Mike Gowing, Pam Harting-Barat, BoS; John Petersen, Xuan Kong, SC; Doug Tindal, Pat Clifford, FC; Dore Hunter, MMT; Steve Ledoux, John Murray, Steve Mills and Don Aicardi, staff.

Audience: Kim McCosker, SC, Steve Noone, Clint Seward, FC; Allen Nitschelm, Richard Calandrella & Chas. Kadlec, AVG.

1. Minutes of 11/10/11 were accepted with one minor typo correction and the addition of OPEB, after Ch.69.

3. Update of FY 12 revenue

Steve M: In the past the schools have used the federal stimulus money to pay forward bills. This has worked and allowed the schools to return money to reserves. With the current trending of the budgets things will be much tighter and there will not be the \$4-500k so they will not be paying bills forward. Last week AB was \$300k to the good and APS a bit less.

Steve L: Take our information from the spreadsheet. Rep. Cory Atkins told him to expect a 10% cut in local aid. He has not heard this information from any other source.

Mike suggested people look at the report from the Mass Taxpayers Association

Bart: Any Comments?

John P asked if it was difficult to get into the budget hearings at the Gardner Auditorium (State House) He was told that they are usually packed & to get there early.

Pat C: Asked if the 10% number included school aid. No one knew.

4. Review of ALG spreadsheet --Don & John M

a. review of revenue & expense projections b. Reserve use discussion c. OPEB discussion d. Tax to the max discussion

Extra info: Town of Acton multi-year plan (ALG plan) & percentage change detail for municipal budget

Don explained that he & John M. have worked together on the plan. He started to delineate the changes from last meeting.

As requested: the reconciliation of the debt shift from APS to the town \$390k---was carried forward for FY 13, 14 & 15

The APS number is not hard---it will come for the Jan. sheet---estimate for level service will be @ \$150k which is a 4% increase

Acton's portion of AB has changed due to the changes in enrollment averages. The shift has lowered Boxboro's portion, Acton has to assume a \$300k increase. The APS numbers are in flux & are being "scrubbed"

Municipal---detail sheet: John M: a 3.5% increase; approximately \$600k for nursing service---\$200k for this year, \$400k for FY 13

Transportation enterprise fund: tax subsidy is going away cost will go from \$75k to \$246k; it all adds up to 5.75%---less than level service. Not included is the \$ 700k request for four patrol officers; capital bonding could ease the situation. The two big drivers are nursing service and transportation. Reserves will be \$200k higher for nursing service.

Don: Districts have opportunity for \$3M in Ed Jobs money. Reserves for APS/AB is \$19k higher

Page 3 Full tax to capacity---\$798k under

JM: DOR did not certify values---BOS vote on classification was not held

SL: The DOR has certified only 140 or the 350 towns

Pat will we try to capture the unused levy capacity?

JM The anticipation is to go to the full limit as well as unused capacity

Don (back to school revenues) We are showing an \$85k supplemental from lotteries--- do not count on it in FY 13. For Ch. 70 we are assuming that the Gov. will fully fund at the Foundation amount for APS/AB—inflation factor is important. Roger Hatch (DOE) confirmed that inflation will go from the 2.5% we are now using to 3.6%

Reserve page: Town Meeting votes were used; using anticipated free cash—also includes the \$200k for Nursing Service; beginning reserve position \$9.3M; use \$1.892M; replenishment \$813k—leaving \$8,220M

Took \$253k to return to Boxboro

Bart: any questions about reserve use? There were general kudos for the work done by Don & John M

Don asked about the need for a Minuteman Tech line & it was agreed to add one to the spreadsheet. The assessment for Acton is @\$30k.

Pat: asked that the amount of the HIT reserve be indicated---as it acts as a subsidy for all budgets

b. Reserve Use

Xuan—APS is “comfortable with \$2M use of reserves rather than the \$1M suggested by the FC—there is a lot of catching up to do. OPEB is a big liability APS has no concrete position

JP: OPEB is on the agenda, I do hope the FC has finished their analysis, then we can figure out what needs to be done [take it back to boards]

Doug T.FC feels that the question of sustainability [of the budgets] needs part of our thought process as we prepare budgets for the next few years. We sometimes use the word “reserves” carelessly. After all it is an amalgam of free cash/E&D and more stable funds like NESWC. In the last few years we have reduced this fund from over \$5M to \$2.4M so it is ½ gone and not likely to be replenished again. In this sense our “reserves” are really more like a “slush fund” rather than monies consciously set aside for future needs. So, for budgeting purposes it is appropriate to ask how much money do we reliably have every year that we can call reserves? The FC thinks we need to slow down and deal with some of the big number problems, especially OPEB. How much is enough for OPEB--\$5m /year as the consultants suggest, or some lesser amount? Will the State [come to the rescue] and restructure the problem. Can we really in good conscience afford to take \$5m from an \$80m budget? The FC concluded that there are three possibilities 1. Do nothing 2. Pay it off at the full recommended amount or 3. Do something serious, but incremental. We believe that the first two possibilities would be wrong. The FC believes that we need to choose as “politically cognizable” number which is big enough to get everyone’s attention on the OPEB problem, but not so large as to really do any damage in this recession year. We chose \$500k knowing that while that \$500k is 1/10 of what the consultants say we need to begin to retire the debt, it is nonetheless large enough to be recognized as a first step. Our message is to slow down [in spending] & think about sustainability of the budgets---the real problems will come next year and in later years where we are already showing deficits in the \$4-\$6M range.

JP: question: use of reserves or net use of reserves—will the \$500k come from the \$1m?

DT: the whole is \$1.5m inclusive of OPEB. I don’t want to get down into picking out specific issues, there are some things the FC thinks are out of control like OPEB. Other items that are potential targets such as nursing, transportation, lower fields and the like, but it is our position that choosing which items need to be aggressively dealt with is a function of the boards and executives of the town and schools. We aren’t presuming to pick targets but rather just trying to set the overall limits to what is prudent spending.

Bart: Is the question \$2m or \$1.5m use of reserves?

There was a discussion about the level of reserve use.

****It was agreed that ALG members would discuss the levels with their boards as well as the OPEB liability. It was also agreed that somewhere OPEB should be added to the spreadsheet on its own back page and become an action item on future ALG agendas.

JP suggested that the Town follow Bob Evan's (of FC) suggestion & invest the money in accounts where there was a decent rate of return.

Pat. C said that trust funds were statutorily defined and they were limited to where the money could be placed

Steve L suggested that there might need to be some PR about the OPEB well before Town meeting so that voters know about the situation & it does not come as a surprise.

John P. Noted that the report for the OPEB liability had inflation at 10% where in fact it was 3%.

Bart noted the hour & asked what should be done in the last 20 minutes Bart suggested Tax to the Max & polled those at the table.

Steve M. wanted \$2m in reserve use not \$1.5---(tax to the max)

Pat the FC is OK with 2.5% increase but not with recapturing the \$293k---we can recapture at a later time.

JP The schools have no position on OPEB so it could be \$0---but we do have uses for the additional capacity

JM: the plan with current expenses is \$2.4m in the hole. Because we budgeted for less in local aid than came in we expect \$5-\$800k of untaxed capacity

Xuan: for the past three years we have kept the budgets at level service. We have used the reserves based on the FC's recommendations. There are structural deficiencies that need to be addressed. I know how much it will cost but for the sake of the kid's education, we need to spend the money. OPEB has been accumulating for many years---trying to offset the costs by cutting current services---I am not sure that this is the best use of the tax money. Use other revenue sources such as an override to fund OPEB should be considered as well.

Doug: I agree with the sentiment ---every year we don't fund retirement from the money for current use we are just putting the costs on the future kid. The number is so big because year after year we've failed to fund it in the past.

Bart: are we going to need extra meetings? ---there was no agreement

Xuan: AB study committee wants to put a place holder on the warrant to get the sense of the Town Meeting about regionalizing the elementary schools. ---that was agreed

John M: Good news---Acton has been on Moody's watch list for a possible down grade. Yesterday they came back with the AAA rating.

Bart: Next meeting Jan 12 at 5 PM

There was unhappiness from the audience that for the second time, there was not a public comment period.

Bart apologized but said time ran out.

Ann Chang

Minuteman Regional Vocational Technical School District

About Minuteman

Minuteman is a four-year public high school serving the member towns of: Acton, Arlington, Belmont, Bolton, Boxborough, Carlisle, Concord, Dover, Lancaster, Lexington, Lincoln, Needham, Stow, Sudbury, Wayland, and Weston. Minuteman combines rigorous academics in preparation for college with relevant career and technical programs.

Acton Enrollment

As of October 1, 2011 twenty-five (25) high school students and five (5) post graduate students were enrolled at Minuteman providing a full time equivalent (FTE) of thirty (30) residents of Acton.

Minuteman experienced a 7% increase in the Freshman Class resulting in the largest freshman class in 12 years. The "Benefits of Minuteman" are clear:

- **Experience the Modern American High School.** Minuteman offers a distinctly modern learning experience where students venture beyond a traditional high school curriculum to explore their interests and discover their passion, whether that's Bio-technology, Robotics, Environmental Technology, or something else entirely from among our twenty majors.
- **Believe in Yourself.** Students graduate from Minuteman with an enduring self-confidence that they can achieve anything they set out to do, no matter how high the hurdle, how long the road, how loud the skeptics.
- **Prepare for College and Life.** Minuteman equips students with the academic foundation and study skills to succeed in college *and* the industry certifications and acumen to succeed in business, affording every student a unique flexibility upon graduation to pursue their dreams.
- **Learn from Experts.** Minuteman's teachers are demonstrated experts in their respective fields, injecting a depth of knowledge and experience into their classes that is rarely found in public or private schools.
- **Be More Than Just Another Student.** There is no such thing as "just another student" at Minuteman – instead, teachers and staff personally invest themselves in truly knowing each student and working closely with them to realize their full, individual potential.
- **Make a Fresh Start.** From their very first day of school, Minuteman students are given the opportunity to make a fresh start among new friends and new teachers who will see them as they are and not as who they once were.

Acton-Boxborough Regional High School and Minuteman Half Day Program

Minuteman offers a unique program allowing juniors and seniors, who have passed the MCAS, enrollment on a half day-every day basis in a career major. This allows a student to graduate from Acton-Boxborough Regional High School and receive a competency certificate from Minuteman. Currently, no Acton students participate.

Minuteman offers 'Post Graduate' programs to Acton residents of any age who are seeking to enhance their skill development. Post-Graduate Students are charged tuition to offset operating costs.

2011 Acton Graduates and Awards

Miria de Souza, Health Occupations
Devin Howell, Environmental Technology
Alyson Williams, Retail Marketing/Banking

At the 2011 graduation, Alyson Williams received the Academic Achievement Award in Physical Education and Portfolio Award. Miria de Souza received the Acton Boxborough Rotary Club Award and the Mass. Secondary School Administrators Association Award.

Skills USA

<u>Student</u>	<u>Competition Category</u>	<u>State Results</u>
Henry Maynard	Programming & Web	1 st Place

Class of 2011 Graduate Achievement Highlights

- 73% college bound or advanced Technical Training, 12% career bound and 4% military. Overall, graduates achieved an 89% positive placement rate.
- 100% of Dental graduates passed the National Dental Board examination.
- 90% of Early Education and Care program completers were certified by the Massachusetts Department of Early Education and Care.
- 78% of Cosmetology graduates passed State Board examinations.
- Health Occupation graduates achieved 78% in college acceptance.
- 86% of Environmental Technology graduates earned the Massachusetts Grade II Municipal Wastewater Treatment Plant Operator License.
- Valedictorian Michael Breen, Biotechnology graduate from Bolton attending University of Rochester in Rochester, NY. Salutatorian Benjamin Basseches, Pre-Engineering graduate from Lexington attending Brown University in Providence, RI.

Capital Projects

- Lexington Water Department is requiring replacement of several major components of the school's water supply system. This work will be completed in December 2011; estimated total cost of \$120,000 is covered out of our FY12 budget.
- An emergency \$475,000 capital project was successfully completed. Lexington issued an order at the end of June 2011 in regards to the area of the school known as the Trades Hall. The order restricted access and occupancy to the Trades Hall immediately. Minuteman had to obtain a waiver from DCAM to hire a design architect, demolish the interior area and rebuild the area under current building codes in order to open school in the fall.
- MSBA Update: Minuteman is in the "pipeline" of the Vocational School Repair and Renew program announced by the State Treasurer's office in 2010. The Feasibility Study financing was unanimously approved by all 16 member towns in 2010. The School Building Committee will review various models to accommodate member community enrollment, as well as various levels of non-member enrollment. A final project model is expected by 2014.

Curriculum and Instruction

- Since 2008, all 9th grade students to have English and Math every day, rather than a "week-on-week-off" schedule, thus providing more consistent and concentrated instruction as well as project-based learning.
- The Educational Program planning process has identified several new programs that offer students increased choices in career majors, including Criminal Justice/Bio-Security, Animal Science and the Technical Theater Arts. Two programs phased out in 2010 included Office Technology and Auto Body Repair. Drafting and Design Visual Communications will be phased out by 2014.

Professional Development

- The Minuteman staff have created academic and Career and Technical Education (CTE) goals that emphasize formative assessment practices, teacher-to-teacher peer observations, Executive Function support, Reading Consultancies, and Academic-Career and Technical curriculum integration. The integration of technology to enhance student learning is an ongoing commitment.

Student Access, Participation and Support

- An Executive Function initiative was launched last year. Minuteman provides students with resources to enhance their planning and organization skills.
- Minuteman continues to support a full-time Reading Specialist. In addition to working with the students on his own caseload, he consults with academic and CTE teachers toward the development and application of a school-wide reading program.
- The Special Education department successfully implemented the Student Learning Center (SLC). The SLC allows students to understand their disability, develop skills, and techniques to minimize the impact of the student's disability, and to promote independence and personal responsibility. The SLC supports the transition to college.
- Minuteman offers 16 sports with three levels (Varsity, Junior Varsity and Freshman) throughout the school year. Over the past 7 years the number of participants has doubled in many of the sports offered. Students have more than 20 clubs and activities.

- The Minuteman Parent Association (MPA) meets monthly and supports all aspects of the Minuteman community. In addition, the *Grant-a-Wish* program supports numerous initiatives and incentives for student achievement.

Town of Acton Multi-Year Plan
Prepared for Annual Town Meeting by the Acton Leadership Group

1/11/2012

Town of Acton Revenues					
	FY11	FY12	FY13	FY14	FY15
	Recap	Recap			
A. Revenues (GROSS)					
Tax Levy (excluding debt exclusion)	\$62,108	\$63,781	\$66,398	\$68,499	\$70,653
State Aid	\$12,010	\$12,075	\$12,600	\$13,230	\$13,891
EdJobs (Acton share of APS & ABRSD for school use in FY13)	\$0	\$0	\$745	\$0	\$0
Local Receipts	\$3,788	\$3,906	\$3,980	\$4,080	\$4,182
Debt Exclusion	\$3,098	\$3,073	\$3,034	\$2,928	\$2,902
SBAB Reimbursement	\$1,009	\$1,009	\$1,009	\$1,009	\$1,009
Total Revenues (including debt)	<u>\$82,012</u>	<u>\$83,845</u>	<u>\$87,766</u>	<u>\$89,745</u>	<u>\$92,637</u>
B. Debt Exclusion Debt Service					
APS School Debt Exclusion	\$619	\$611	\$615	\$614	\$616
Public Safety Facility Debt Exclusion	\$394	\$483	\$473	\$462	\$451
Municipal Debt Exclusion	\$492	\$378	\$343	\$244	\$230
JHS/SHS Debt Exclusion	\$1,593	\$1,601	\$1,604	\$1,608	\$1,605
SBAB Reimbursement-Parker/Damon	\$1,009	\$1,009	\$1,009	\$1,009	\$1,009
Total Debt Exclusion/SBAB	<u>\$4,107</u>	<u>\$4,082</u>	<u>\$4,043</u>	<u>\$3,937</u>	<u>\$3,911</u>
C. Available Town Revenues (NET) (A - B)	\$77,905	\$79,762	\$83,723	\$85,809	\$88,726
Town of Acton Expenditures					
Town of Acton Municipal Budget	\$24,545	\$25,061	\$25,936	\$28,136	\$29,619
Nursing Enterprise Fund Tax Subsidy	\$0	\$0	\$600	\$0	\$0
Transportation Enterprise Fund Tax Subsidy	\$0	\$75	\$246	\$0	\$0
FY11 ATM Article 13 (April 2010) & STM (June 2010)	\$151	\$0	\$0	\$0	\$0
FY11 Acton Municipal Capacity Not Utilized	(\$11)	\$0	\$0	\$0	\$0
+ Transfer to Acton Municipal for APS Debt	\$309	\$309	\$203	\$198	\$132
+ Transfer to Acton Municipal for COPS	\$70	\$72	\$0	\$0	\$0
Total Municipal Allocation	<u>\$25,064</u>	<u>\$25,517</u>	<u>\$26,985</u>	<u>\$28,334</u>	<u>\$29,751</u>
Percentage change year-to-year		1.81%	5.75%	5.00%	5.00%
Acton Public Schools Allocation	\$26,289	\$26,495	\$27,469	\$28,432	\$29,929
- Transfer to Acton Municipal for APS Debt	(\$309)	(\$309)	(\$203)	(\$198)	(\$132)
- Transfer to Acton Municipal for COPS	(\$70)	(\$72)	\$0	\$0	\$0
Total APS Allocation	<u>\$25,910</u>	<u>\$26,114</u>	<u>\$27,267</u>	<u>\$28,630</u>	<u>\$30,061</u>
Percentage change year-to-year		0.79%	4.41%	5.00%	5.00%
Town of Acton Portion of ABRSD Allocation	\$28,849	\$29,207	\$30,717	\$32,253	\$33,866
Percentage change year-to-year		1.24%	5.17%	5.00%	5.00%
Total Minuteman Allocation	\$608	\$777	\$839	\$876	\$916
Acton Share of Trade Hall Remediation Project			\$29		
Percentage change year-to-year		27.80%	7.94%	4.50%	4.50%
Other Post Employment Benefits (OPEB) Trust Contribution	\$0	\$0	\$0	\$0	\$0
Town of Acton			\$0	\$0	\$0
Town of Acton Portion of ABRSD Contribution			\$0	\$0	\$0
Non-Recurring Expenses from Special Town Meeting Votes		\$0	\$0	\$0	\$0
Oct 25 2010 Caouette Land Purchase	\$170				
Oct 12 2010 Caouette Land Purchase	\$257				
June 14 2010 FY09-10 Fire	\$86				
Article 23 ATM Bridge Work	\$210				
Article 12 Police Sup Past Due	\$31				
D. Town of Acton Expenditures (NET)	\$81,184	\$81,615	\$85,808	\$90,094	\$94,594
E. Subtotal Town of Acton Projected Balance	(\$3,279)	(\$1,853)	(\$2,085)	(\$4,285)	(\$5,868)
F. Use of Reserves (TOTAL)	\$3,278	\$1,853	\$1,892	\$2,052	\$2,052
G. Total Town of Acton Projected Balance	(\$1)	\$0	(\$193)	(\$2,233)	(\$3,816)

Town of Acton - Tax Impact					
	FY11	FY12	FY13	FY14	FY15
	Recap				
Existing Valuation ('000s)	\$3,640,774	\$3,640,774	\$3,664,283	\$3,687,253	\$3,687,253
New Growth value ('000s)		\$23,509	\$22,969	\$22,354	\$22,354
Total Valuation ('000s)	<u>\$3,640,774</u>	<u>\$3,664,283</u>	<u>\$3,687,253</u>	<u>\$3,709,606</u>	<u>\$3,709,606</u>
Tax Rate	\$18.08	\$18.50	\$19.01	\$19.44	\$19.44
SF Value	\$500,492	\$500,492	\$500,492	\$500,492	\$500,492
SF Tax Bill	\$9,048	\$9,261	\$9,516	\$9,728	\$9,728
% Change	3.16%	2.35%	2.76%	2.23%	2.23%
\$ Change	\$277.08	\$212.66	\$255.18	\$211.93	\$211.93

Highly volatile numbers
Subject to change

Updated ALG 1/11/2012

8 of 16

Summary - Changes from Previous Version dated 7/20/11

1/11/12 12:18 PM

Location of Change (Sheet)	Subject Title	Amount	Explanation of why assumption changed	Date of Change	Proposer
Revenues-Local Receipts	Motor Vehicle Excise Tax	(\$40)	Revised FY12 Estimates Based on final FY11 estimates	20-Jul-11	John Murray
Revenues-Local Receipts	Fees	\$186	Revised FY12 Estimates Based on final FY11 estimates	20-Jul-11	John Murray
Revenues-Local Receipts	Investment Income	(\$20)	Revised FY12 Estimates Based on final FY11 estimates	20-Jul-11	John Murray
		7/20/2011 Meeting			
		\$126			
Acton FY12 Cherry Sheet-Revenues	Chapter 70	\$104	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Charter Tuition Reimbursements	(\$0)	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	School Lunch	\$1	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Unrestricted General Government Aid	\$110	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Police Career Incentive	(\$10)	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Veterans Benefits	\$2	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Exemptions: Vets, Blind, Surviving Spouses & Elderly	\$2	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	State Owned Land	\$5	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Revenues	Public Libraries	\$1	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
		7/20/2011 Meeting			
		\$214			
Acton FY12 Cherry Sheet-Charges	Mosquito Control Projects	\$1	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	Air Pollution Districts	\$0	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	Metropolitan Area Planning Council	\$0	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	RMV Non-Renewal Surcharge	\$0	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	MBTA	\$2	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	Regional Transit	\$0	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	School Choice Sending Tuition	(\$5)	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
Acton FY12 Cherry Sheet-Charges	Library and School Lunch Direct Aid (Cherry Sheet Offsets)	(\$2)	Reflecting Final Acton FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
		7/20/2011 Meeting			
		(\$2)			
ABRSD FY12 Cherry Sheet-Revenues	Chapter 70	\$111	Reflecting Final ABRSD FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
ABRSD FY12 Cherry Sheet-Revenues	Regional School Transportation	\$70	Reflecting Final ABRSD FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
ABRSD FY12 Cherry Sheet-Revenues	Charter Tuition Reimbursements	\$4	Reflecting Final ABRSD FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
ABRSD FY12 Cherry Sheet-Revenues	Charter School Sending Tuition	(\$14)	Reflecting Final ABRSD FY12 Cherry Sheets (released July 11, 2011)	20-Jul-11	Don Alcardi
		7/20/2011 Meeting			
		\$172			
	Revenues Increase/(Decrease) since last meeting?	\$510			
ABRSD FY13 Cherry Sheet-Revenues	Chapter 70	\$61.9	Reflects % Change for Acton Portion of AB Revenue from 79.81% to 80.67%	11/22/2011	Don Alcardi
ABRSD FY13 Cherry Sheet-Revenues	Charter Tuition Reimbursements	\$0.4	Reflects % Change for Acton Portion of AB Revenue from 79.81% to 80.67%	11/22/2011	Don Alcardi
ABRSD FY13 Cherry Sheet-Revenues	Charter School Sending Tuition	(\$3.0)	Reflects % Change for Acton Portion of AB Revenue from 79.81% to 80.67%	11/22/2011	Don Alcardi
Town of Acton Municipal Budget	+ Transfer to Acton Municipal for APS Debt	(\$106.0)	Reflects drop in APS Debt After FY12	11/22/2011	Don Alcardi
Acton Public Schools Allocation	+ Transfer to Acton Municipal for APS Debt	\$106.0	Reflects drop in APS Debt After FY12	11/22/2011	Don Alcardi
Town of Acton Portion of ABRSD Allocation	Acton Portion of APS	\$418.0	Reflects % Change for Acton Portion of AB Expenditures from 79.81% to 80.67%	11/22/2011	Don Alcardi
Reserves	Acton Portion of Certified E&D	\$6	Reflects % Change for Acton Portion of AB Revenue from 79.81% to 80.67%	11/22/2011	Don Alcardi
Acton FY13 Cherry Sheet-Revenues	Chapter 70	\$213	Reflects change in Foundation Budget formula for Inflation Factor from 2.5% to 3.6%	11/22/2011	Don Alcardi
ABRSD FY13 Cherry Sheet-Revenues	Chapter 70	\$100	Reflects change in Foundation Budget formula for Inflation Factor from 2.5% to 3.6%	11/22/2011	Don Alcardi
ABRSD & APS FY13 Federal Grants	EdJobs	\$19	Reflects final federal EdJobs number due to additional \$2.9 million made available	12/5/2011	Don Alcardi
		12/8/2011 Meeting			
		\$815			
APS FY13 Budget	FY13 APS Investment Budget	(\$9.0)	Reflects FY13 APS Investment request	1/4/2012	Don Alcardi
AB FY13 Budget	FY13 AB Investment Budget	(\$379.0)	Reflects FY13 AB Investment request	1/4/2012	Don Alcardi
FY13 Minuteman Allocation	FY13 Minuteman Allocation	\$27	Reflects current estimate for Minuteman plus \$27,000 for Trade Hall Remediation	1/4/2012	Don Alcardi
Total Revenue	FY13 Estimated Tax Levy Base	\$22	Reflects technical change post recap submittal	1/4/2012	Don Alcardi
		1/12/2012 Meeting			
		(\$339)			

Updated ALG 1/11/2012

Revenues

Tax Levy

	FY11 Recap	FY12 Recap	FY13	FY14	FY15
Base	\$ 61,044	\$ 63,020	\$ 64,998	\$ 67,048	\$ 69,149
Unused Levy Capacity	(293)	(601)			
2 1/2%	\$ 1,526	\$ 1,576	\$ 1,625	\$ 1,676	\$ 1,729
New Growth	\$ 449	\$ 402	\$ 425	\$ 425	\$ 425
Prior Year Overlay Deficit	\$ (6)				
Overlay	\$ (612)	\$ (616)	\$ (650)	\$ (650)	\$ (650)
Total Tax Levy (excluding debt exclusion)	\$ 62,108	\$ 63,781	\$ 66,398	\$ 68,499	\$ 70,653
Debt Exclusion	\$ 3,098	\$ 3,073	\$ 3,034	\$ 2,928	\$ 2,902
Total Tax Levy (including debt exclusion)	\$ 65,206	\$ 66,854	\$ 69,432	\$ 71,427	\$ 73,555

Tax Impact

	FY11 Recap	FY12	FY13	FY14	FY15
Existing Valuation ('000s)	\$ 3,640,774	\$ 3,640,774	\$ 3,663,014	\$ 3,686,088	\$ 3,708,441
New Growth value ('000s)		\$ 22,240	\$ 23,074	\$ 22,354	\$ 21,867
Total Valuation ('000s)	\$ 3,640,774	\$ 3,663,014	\$ 3,686,088	\$ 3,708,441	\$ 3,730,308
Tax Rate	\$ 18.08	\$ 18.42	\$ 19.01	\$ 19.44	\$ 19.89
		1.89%	3.22%	2.23%	2.35%
SF Value	\$ 500,492	\$ 500,492	\$ 500,492	\$ 500,492	\$ 500,492
SF Tax Bill	\$ 9,048	\$ 9,219	\$ 9,516	\$ 9,727	\$ 9,956
% Change		1.89%	3.22%	2.23%	2.35%
\$ Change		\$ 171	\$ 297	\$ 212	\$ 229

Debt Exclusion & SBAB Income

Debt on APS
Debt on JHS/SHS
Total Debt Incurred
Debt on PSF

Total Debt Exclusions

SBAB Reimbursement - Parker Damon

Total Debt Exclusions + SBAB Reimb

FY11 Recap	FY12 Recap	FY13	FY14	FY15
\$619	\$611	\$615	\$614	\$616
\$1,593	\$1,601	\$1,604	\$1,608	\$1,605
\$394	\$378	\$343	\$244	\$230
\$492	\$483	\$473	\$462	\$451
\$3,098	\$3,073	\$3,034	\$2,928	\$2,902
\$1,009	\$1,009	\$1,009	\$1,009	\$1,009
\$4,107	\$4,082	\$4,043	\$3,937	\$3,911

\$2,481

Other Post Employment Benefits (OPEB) Trust Contribution

Town of Acton

Town of Acton Portion of ABRSD Contribution

Total OPEB Trust Contributions

FY11 Recap	FY12 Recap	FY13	FY14	FY15
\$0	\$0	\$0	\$0	\$0
\$0	\$0	\$0	\$0	\$0
\$0	\$0	\$0	\$0	\$0

Revenues

State Aid

Cherry Sheet

Regional Revenue (Acton Share)

Total State Aid

	FY11 Recap	FY12 Recap	FY13	FY14	FY15
\$	6,261	\$ 6,190	\$ 6,448	\$ 6,770	\$ 7,109
\$	5,749	\$ 5,885	\$ 6,152	\$ 6,460	\$ 6,783
\$	12,010	\$ 12,075	\$ 12,600	\$ 13,230	\$ 13,891

Acton

Chapter 70

SFSE Stimulus

Subtotal Ed Aid

Charter Tuition Reimbursements

School Lunch

Lottery, Beano & Charity Games

General Fund Supplemental to Hold Harmless Lottery

Additional Assistance

Unrestricted General Government Aid

Unrestricted General Government Aid-Supplemental

Police Career Incentive

Veterans Benefits

Exemptions: Vets, Blind, Surviving Spouses & Elderly

State Owned Land

Public Libraries

Subtotal-Other

Mosquito Control Projects

Air Pollution Districts

Metropolitan Area Planning Council

RMV Non-Renewal Surcharge

MBTA

Regional Transit

Special Education

School Choice Sending Tuition

Subtotal-Less Assessments

Library and School Lunch Direct Aid (Cherry Sheet Offsets)

Net Cherry Sheet-Town of Acton

Acton-Boxborough

Chapter 70

Regional School Transportation

Charter Tuition Reimbursements

Charter School Sending Tuition

School Choice Sending Tuition

Net Cherry Sheet-Acton Portion of Acton/Boxborough

FY09 Cherry Sheet	FY10 Cherry Sheet	FY11 Cherry Sheet	FY12 Cherry Sheet FINAL	FY13 Estimate
\$5,228,141	\$5,123,578	\$5,160,527	\$5,188,231	\$5,446,398
\$0	\$357,131			\$0
\$5,228,141	\$5,480,709	\$5,160,527	\$5,188,231	\$5,446,398
\$11,331	\$5,967	\$3,880	\$9	\$9
\$12,013	\$12,013	\$9,996	\$11,212	\$11,212
\$1,484,039	\$0	\$0	\$0	\$0
\$227,222	\$0	\$0	\$0	\$0
\$29,696	\$0	\$0	\$0	\$0
\$0	\$1,232,453	\$1,183,155	\$1,097,608	\$1,097,608
\$0	\$0	\$0	\$0	\$0
\$118,000	\$18,748	\$9,245	\$0	\$0
\$8,286	\$20,782	\$35,498	\$42,560	\$42,560
\$38,932	\$37,687	\$38,099	\$36,566	\$36,566
\$62,997	\$56,752	\$51,904	\$53,760	\$53,760
\$33,363	\$25,937	\$25,729	\$25,780	\$25,780
\$2,025,879	\$1,410,339	\$1,357,506	\$1,267,495	\$1,267,495
(\$52,897)	(\$53,264)	(\$52,842)	(\$54,053)	(\$54,053)
(\$6,571)	(\$6,601)	(\$6,749)	(\$7,048)	(\$7,048)
(\$6,034)	(\$6,159)	(\$6,270)	(\$6,461)	(\$6,461)
(\$8,820)	(\$9,740)	(\$8,860)	(\$14,520)	(\$14,520)
(\$107,610)	(\$108,703)	(\$107,508)	(\$107,393)	(\$107,393)
(\$22,908)	(\$23,481)	(\$24,068)	(\$24,670)	(\$24,670)
\$0	(\$1,056)	\$0	\$0	\$0
(\$15,006)	(\$7,650)	(\$15,000)	(\$15,000)	(\$15,000)
(\$219,840)	(\$225,654)	(\$221,297)	(\$229,147)	(\$229,147)
\$7,034,180	\$6,665,394	\$6,261,011	\$6,189,587	\$6,447,754
\$5,413,736	\$5,305,461	\$5,492,159	\$5,622,000	\$5,888,910
\$622,353	\$488,864	\$479,959	\$513,212	\$513,212
\$113,901	\$63,297	\$87,963	\$34,542	\$34,542
(\$328,937)	(\$281,507)	(\$311,279)	(\$284,542)	(\$284,542)
\$5,821,053	\$5,576,115	\$5,748,802	\$5,885,212	\$6,152,122

Assumes Full Foundation Funding

5%

\$258,167

Percentage of

Acton Portion

80.67%

81.0%

80.67%

80.67%

\$266,910

Revenues

Local Receipts

Excise Taxes
Fees
Miscellaneous Non-Recurring
Investment Income
Total Local Receipts

	FY11 Recap	FY12 Recap	FY13	FY14	FY15
\$	2,515	2,600	2,600	2,665	2,732
\$	999	1,101	1,210	1,240	1,272
\$	84	86	-	-	-
\$	190	120	170	174	179
\$	3,788	3,906	3,980	4,080	4,182

Variance to
FY12 Projected?

Motor Vehicle Excise
Penalties and Interest on Taxes and Excises
Payments In Lieu of Taxes
Other Charges For Services
Fees
Misc
Other Departmental Revenue
Licenses and Permits
Fines and Forfeits
Fees
Investment Income
Miscellaneous Non-Recurring
Local Receipts-TOTAL

FY08 Recap	FY09 Recap	FY10 Recap	FY11 Recap	FY12 Recap
\$2,690,300	\$2,865,000	\$2,514,503	\$2,514,503	\$2,600,000
\$140,200	\$180,000	\$148,573	\$148,573	\$106,500
\$11,500	\$11,500	\$11,934	\$11,934	\$11,800
\$115,800	\$125,000	\$23,779	\$23,779	\$19,800
\$338,100	\$360,000	\$0	\$0	\$0
\$0	\$0	\$37,050	\$0	\$0
\$93,100	\$135,000	\$765,587	\$667,872	\$900,600
\$177,700	\$200,000			
\$127,600	\$160,000	\$146,812	\$146,812	\$62,100
\$1,004,000	\$1,171,500	\$1,133,735	\$998,971	\$1,100,800
\$723,700	\$360,750	\$190,210	\$190,210	\$120,000
\$0	\$0	\$0	\$83,919	\$85,547
\$4,418,000	\$4,397,250	\$3,838,448	\$3,787,603	\$3,906,347

FY12 Projected
\$2,600,000
\$148,573
\$0
\$23,779
\$0
\$0
\$891,080
\$146,811
\$1,210,243
\$170,000
\$0
\$3,980,243

FY13 Projected
\$2,600,000
\$148,573
\$0
\$23,779
\$0
\$0
\$891,080
\$146,811
\$1,210,243
\$170,000
\$0
\$3,980,243

\$0

\$0

\$0

\$0

A. Beginning Reserve Position

Certified Free Cash From Last Fully Completed Fiscal Year
Free Cash Voted Oct. 12, 2011 STM Vote
Free Cash Voted Oct. 25, 2011 STM Vote
Free Cash Voted Nov. 30, 2011 STM Vote

For FY12 Use (thru June 30, 2010 close)	For FY13 Use (generated thru FY11 close)	For FY14 Use Estimated	For FY15 Use Estimated
\$4,650 (\$257) (\$170)	\$5,933	\$5,555	\$4,893

Subtotal Certified Free Cash

\$4,224	\$5,933	\$5,555	\$4,893
\$2,435	\$1,859	\$1,468	\$943
\$1,366	\$1,507	\$1,197	\$882
\$8,025	\$9,300	\$8,220	\$6,718

NESWC Available Balance
Action Portion of Certified E&D from Last Fully Completed Fiscal Year
Total- Beginning Reserve Position

B. Actual Annual Use Of Reserves Used In Budget

Certified Free Cash
ANTICIPATED-Certified Free Cash for Nursing Enterprise at April, 2012 Town Meeting
NESWC
Action Portion of Certified E&D

FY12 Budget-FINAL	FY13 TBD	FY14 Estimated	FY15 Estimated
\$1,000	\$680	\$912	\$912
\$0	\$200	\$0	\$0
\$576	\$391	\$525	\$525
\$277	\$621	\$615	\$615
\$1,853	\$1,892	\$2,052	\$2,052

Total- Actual Annual Use of Reserves Used In Budget

Annual Percentage Of Reserves Used to Support Annual Budget?

2.27%	2.21%	2.28%	2.17%
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C. Assumption of Reserve Replenishment Generated In Prior Fiscal Year

Townwide Fiscal Year Turnbacks & Excess Revenues
Town Savings from Reducing Action Portion for ABRSD By Close of FY12 (5% Cap)
Unused Warrant Articles, Land Titles
NESWC
Anticipation of Returning Action Portion of ABRSD E & D By Close of FY12 (over 5% Cap)
ABRSD Fiscal Year Turnbacks-Action Portion

(thru June 30, 2011 close)	(thru June 30, 2012 close)	(thru June 30, 2013 close)	(thru June 30, 2014 close)
\$2,709	\$250	\$250	\$250
\$0	\$252	\$0	\$0
\$0	\$0	\$0	\$0
\$0	\$0	\$0	\$0
(\$253)	\$0	\$0	\$0
\$672	\$311	\$300	\$300
\$3,128	\$813	\$550	\$550

Total- Assumption of Reserve Replenishment

D. Year End Available Balance (A Minus B Plus C)

Free Cash
NESWC
DOR Certified E&D Available Balance-Action Portion
Total-Year End Available Balance

Thru Close of FY11; (Available for FY13)	Thru Close of FY12; (Available for FY14)	Thru Close of FY13; (Available for FY15)	Thru Close of FY14; (Available for FY16)
\$5,933	\$5,555	\$4,893	\$4,231
\$1,859	\$1,468	\$943	\$418
\$1,507	\$1,197	\$882	\$567
\$9,300	\$8,220	\$6,718	\$5,216
7.87%	9.78%	7.76%	

Projected Year End Available Balance As A Percentage of Annual Budget?

John Murray

From: Kaufman, Natalie (HOU) [Natalie.Kaufman@mahouse.gov] on behalf of Atkins, Cory (HOU) [cory.atkins@mahouse.gov]
Sent: Thursday, January 12, 2012 12:28 PM
To: Kaufman, Natalie (HOU)
Subject: FY '13 REVENUE ESTIMATE

Dear Town and School Officials,

You know what I know when I know it.

Cory Atkins

From: State House News Service [<mailto:news@statehousenews.com>]
Sent: Thursday, January 12, 2012 11:19 AM
To: news@statehousenews.com
Subject: PATRICK, LEGISLATIVE LEADERS AGREE ON FY '13 REVENUE ESTIMATE



PATRICK, LEGISLATIVE LEADERS AGREE ON FY '13 REVENUE ESTIMATE

By Michael Norton
STATE HOUSE NEWS SERVICE

STATE HOUSE, BOSTON, JAN. 12, 2012.....Legislative leaders and the Patrick administration have agreed to base their fiscal 2013 budget bills on the expectation that taxpayers will generate \$21.95 billion in taxes, according to a State House source.

That's a 6.9 percent increase over the original estimate used to build this year's state budget.

Patrick administration officials in October increased their estimate of expected fiscal 2012 tax collections to \$21.01 billion and the projected tax take for next fiscal year is 4.5 percent more than that figure.

While the collection estimate is a major variable in the budget every year – it largely determines the extent of budget investments and reductions – a potentially greater variable next fiscal year is the level of federal aid, with state officials saying they're uncertain how deficit reduction efforts in Washington will affect bottom line budget decisions.

Patrick and his budget deputies have made most of their major fiscal 2013 budget decisions and municipal officials expect the governor to discuss his local aid plans late next week. Patrick plans to release his full fiscal 2013 spending plan on Jan. 25, two days after he delivers his State of the State address.

State law calls for legislative leaders and budget officials in the executive branch to agree on a tax revenue estimate each year by Jan. 15. The estimates are usually off the mark, often by hundreds of millions of dollars, but serve as a starting point for budget deliberations, which over the years have come to feature passage of numerous midyear spending bills, such as a \$131 spending bill that was being teed up Thursday morning by the House Ways and Means Committee.

The fiscal 2013 tax revenue estimate reflects the impact of a pair of tax cuts that took effect on Jan. 1 – a 0.05 percentage point reduction in the personal income tax and a 0.25 percentage point cut in the state corporate tax. The income tax cut is estimated to be worth between \$111 and \$117 million in revenue.

State officials have warned that despite an expected increase in tax collections, residents should brace for additional budget cuts due to continued high demand for government safety net and entitlement programs, such as Medicaid.

[Kyle Cheney and Matt Murphy contributed reporting.]

FY13 Straw Man Proposal for Acton Leadership Group Meeting, January 12, 2012

GOAL: To create a format for the Committee to discuss and reach consensus on the overarching issues of operating budgets, use of reserves and OPEB.

Starting Point Assumption To Balance FY13 budget:

1. Assumes current Acton Municipal budget as proposed in December, 2011
2. Assumes current Acton School budget as proposed in January, 2012
3. Assumes current Acton portion of Acton/Boxborough School budget as proposed in January, 2012
4. Assumes \$500,000 into OPEB Reserve for FY13
5. In order to balance FY13 as assumed above, use of reserves would be \$2.585

Address Future Contingencies:

A. State Aid Changes:

If Total Revenue at Town Meeting is assumed to be higher than the assumptions in the current ALG plan, those additional revenues would be directed towards increasing OPEB reserve for FY13; and/or to lower the use of reserves.

If Total Revenue at Town meeting is assumed to be lower than the assumptions in the current ALG plan, reductions up to \$500,000 would be expected to be made from operating budgets or OPEB by an agreed proportion; any required reductions higher than \$500,000 would be reviewed by ALG.

B. Health Insurance Savings:

FY13 Health Insurance Savings, should they materialize above what is currently reflected in the Operating Budget (4% increase in rates), would be directed from the operating budgets towards increasing the OPEB reserve for FY13.

C. Continuing Review of Operating Budgets:

Whatever potential savings materialize from the review of the FY13 operational budgets by the Board of Selectmen and the Acton School Committee and Acton/Boxborough Regional School Committee during their FY13 budget deliberations should be directed towards increasing OPEB reserve for FY13; or to lower FY13 use of Reserves.

D. Nursing & Transportation Enterprise Fund Tax Subsidy:

If withdrawn before, or not approved at annual Town Meeting, those savings should be directed to lower FY13 Reserve usage.

Town of Acton Finance Committee

FY2012 Finance Committee Point of View with Respect to the 2012 Budget Planning Process

"The Cross Current Point of View"

Background

Intent

- ❑ This memorandum is intended to describe the Town of Acton Finance Committee's Point of View ("POV") with respect to planning for the FY2013 Town and School Budgets.
- ❑ As with prior FinCom Points of View, we invite comments back from the relevant operating boards and administrators.
- ❑ This POV has a name: "The Cross-Current Point of View." The rationale for its naming is detailed below, but, at the highest level, the name is due to the extraordinary political and economic swings that are occurring globally and nationally, which impact our own local fiscal planning.

The Overall Economy

- ❑ While the economy is technically not in a recession, economic and job growth is anemic. These are the first and most prominent of the cross-currents:
 - The unemployment rate is lower than at the same point as last year, but still high;
 - GDP growth is positive, but not increasing to targeted goals;
- ❑ A similar cross-current is that Federal deficits are decreasing, but remain at historically high amounts.
- ❑ The failure of the recent Congressional Super Committee to craft a deficit reduction program is a predictive event that gridlock will continue in Washington through the elections next year. In other words, we should not count on Congress to come up with a mature solution to national deficits.
- ❑ And, finally, on a global level, the worldwide debt crisis has emerged as a significant potential threat to the international economy, and is a threat to banks, to the Euro, and to economic growth in all countries.
- ❑ Consumer confidence has been on an upward trend for calendar year but October's index reversed trend and declined. Consumer spending appears to be trending up. ("Black Friday," so called, posted record volume of sales.)
- ❑ Consumer debt has declined over the last three years as households align debt levels with reduced incomes; this portends the opportunity for a consumer driven recovery.
- ❑ In contrast, fewer new households have been generated as recent college graduates opt to live at home in the face of uncertain employment, high debt loads and underemployment. The "failure to launch" phenomenon impacts overall consumer spending.
- ❑ Inflation is not a major factor in our current deliberations. All borrowing rates, including for municipal obligations, are at historic lows.

State of Massachusetts Fiscal Picture

- ❑ Fighting against the tide, the Massachusetts economy is performing better than the nation as a whole, with lower unemployment rates and increasing revenue.
- ❑ Overall, the picture has improved from last year, but budget pressures remain.
- ❑ The latest Massachusetts Department of Revenue figures for the 4 ½ months of the fiscal year ending November 15, 2011, show an increase of year over year revenue of 5.8%, which is good news as it reflects strengthening economic activity. The same report shows a shortfall against the "benchmark"

numbers, which are essentially a forecast for the year. So, the cross-currents are on display here: revenues increasing year over year revenue, but below benchmark.

- ❑ Pressure on Cherry Sheet revenues will continue, but the Governor and other leaders at the State House avow (and have demonstrated over the last few years) a strong commitment to funding education through Chapter 70 school aid.
- ❑ State leaders believe that the introduction of casino gambling will provide significant new revenue, although, even if true, the degree and timing of the revenues are not certain.
- ❑ From a public policy standpoint, the sea-change with respect to the rights and privileges of public employees took hold in Massachusetts last year, most dramatically demonstrated by the cooperative agreement with respect to health care insurance for public employees, commonly referred to as Chapter 69. (We discuss this in more detail below.)
- ❑ In prior POV's we noted the lagging relationship between GDP growth and State Aid. This has proven out as State Aid is now increasing year over year as GDP growth has returned. (Please see at the end of this POV an up to date chart, entitled "Change in GDP vs. Change in State Aid" for some historical perspective.)

A Comment on FY2012

As with FY2011, revenues for FY2012 have exceeded budgeted amounts. Also, due to a technical calculation and reporting error, ABRSD has excess E&D funds. Obviously, state law must be followed and, as this is very detailed, FinCom defers to the operating entities to inform all about what are the obligations and opportunities with respect to the excess E&D funds. At this writing, FinCom is not clear about the full range of opportunities within the scope of the law, but believes the following principles should be followed.

1. All funds are the collective funds of the citizens and taxpayers of Acton (and Boxborough as it relates to ABRSD) and do not "belong" to any operating entity.
2. The budgets as voted at Town Meeting should not change.
3. To the extent that there are excess funds, and permissible by law, the priority uses of the excess funds should be:
 - a. Lowering of the tax rate, or
 - b. Flow to free cash.
4. Should the operating entities have an alternate plan, it is vital to bring it before the FinCom and seek FinCom's approval as this is purely a financial matter.

Point of View with Respect to Acton's FY 2013 Budget

Current Reserves Assumptions

The following assumptions with respect to reserves were used in creating this document. Because DOR has not yet certified either the Free Cash or Regional E&D balances, we are using the estimates provided in the ALG plan dated November 10, 2011, and will update once certified amounts are available.

Reserve	Amounts from FY2011 POV (for Reference Only)	Approximate Amount for FY2012
Free Cash	\$4.7 million	\$5.4 million
NESWC Fund Balance	\$2.4 million	\$1.9 million
NESWC Environmental Damages Fund	\$1.0 million	\$1.0 million

E&D	\$1.44 million (Acton's share, including additional transportation aid for FY2011)	\$1.5 million
Overlay Undeclared Surplus	\$0	Estimate not available
Allocation of Free Cash from October 2010 Special Town Meeting	(\$0.316) million	\$0
Total Reserves	\$9.224 million	\$9.003 million

There are some other atypical sources of restricted funds that should be noted. While the ARRA Federal Grant money has been allocated, approximately \$726k of EdJobs Grant funding is still available.

The Health Insurance Trust remains in excellent financial condition. The latest report is as follows:

1. On a modified cash-flow basis, FY2012 shows a loss of \$350k year to date (about 2% negative).
2. Enrollment is stable; more than 90% of active employees are enrolled in HMO plans.
3. For FY2011, expenses were \$14.4 million; revenues were \$15.1 million.
4. The draft audit for FY2011 showed a large increase in the trust unrestricted assets, \$650k, to total \$3.61 million.
5. Exclusive of Incurred but Not Recorded (IBNR) expenditures, the trust has over 25% unrestricted assets as a proportion of expenses.
6. The Trust commissioned a study, performed by Segal, which showed that modification of our plan designs to mimic a GIC reference design has the potential to reduce premiums about 8%.

The Current State of Acton Finance

- ☐ The financial management of the Town and Schools is well respected, as manifested by the AAA bond rating from Standard & Poor's Ratings Service.
- ☐ The Town of Acton's overall financial position is strong, due to prudent cost and expenditure controls.
 - ☐ The slate of major capital investments occurred in the late 90's and early 00's, so major infrastructure is in good condition and in the immediate term capacity is adequate. The continuing investment via Community Preservation Act funding is a relief valve for what otherwise might increase pressure for capital investment.
- ☐ With respect to the balance sheet, Acton is in strong shape with substantial reserves. Balance sheet sources of cash, such as free cash, E&D and NESWC fund balances continue to provide latitude with respect to financial decisions.
- ☐ Somewhat contrary to expectations, the State government has been a steady and reliable source of revenue, especially with respect to education funding, during the recent period of low economic growth. Nonetheless, state aid levels are still well below 2006-07 levels.
- ☐ Conversely, uncertainty and volatility are high with respect to Federal funding sources, as Congressional leaders seem unable to create a clear plan for funding the amount of expenditures they have voted to spend.
- ☐ It is worth noting that the school system again received more Chapter 70 funding than we projected.
- ☐ Additionally, as noted above, a technical calculation error has resulted in E&D balances being greater than the statutory limit by an amount of \$313k.
- ☐ With respect to the income statement:

- Revenue from property taxes remains steady with no major delinquency trends appearing.
 - With respect to Fees collected, the trend is positive and in excess of the amounts budgeted last year.
 - Cost and spending control is a continuous focus. Each operating entity is managing budgets conservatively and has been able to absorb significant unpredictable disruptions to date including Tropical Storm Irene and the Halloween Nor'easter.
 - Significant collective bargaining agreements were completed this past year. Some issues remain open, but, for budgetary purposes, this provides compensation certainty for the next couple of years.
- ❑ The full effect of GASB 45's reporting requirements have taken hold. As required by this accounting rule, our Town is now in receipt of a report from an actuarial firm which projects future costs for Unfunded Actuarially Accrued Liabilities ("UAAL"), including those for Other Post-Employment Benefits ("OPEB" or in English language, "Retiree Health Insurance Costs"). While the liability is not new, the reporting of it is relatively recent.
 - ❑ As of June 30 2010 the audited financial statements of the Town and ABRSD showed OPEB liabilities of \$5,655,692 and \$5,057,161 respectively. These numbers represent the difference between what we pay for retiree health costs and what we need to be setting aside for those costs in the future. This is not the cost of future service, it is the cost of the promises we made to employees for service already performed. These are legitimate liabilities and are completely unfunded.
 - ❑ According to the report from The Segal Company, our actuary consulting firm, UAAL numbers are \$43.6 million for ABRSD and \$57.3 million for the Town.

Overall FY2013 Budget Planning

- ❑ The cross-currents impact planning for FY2013. There is a need for a variety of sometimes offsetting financial activities. FinCom recommends a rebalancing of service delivery and costs with a triaging goals of *covering* preexisting liabilities, *investing* in our current programs and *sustaining these services* going forward
- ❑ The focus for FY2013 must continue to be on control of labor costs, in their totality.
- ❑ From a financial standpoint, it is clear and simple that the fiscal management tool of Chapter 69 should be adopted. FinCom also endorses conversations and public meetings among the Boards and other interested groups for the purpose of sharing information and developing a clearer understanding of Chapter 69.
- ❑ Our community must begin to address the UAAL for OPEB costs. This liability has always existed (once included in public employee contracts), so it is not new. But, the growth curve is very steep and a clear plan to manage these liabilities must be put in place, beginning in FY2013 and not a minute later.
- ❑ As such, we recommend the establishment of an OPEB Trust for retiree health insurance benefits and begin to fund the ARC at a demonstration, but meaningful, level. We recommend \$500,000 as a starting number.
- ❑ The FinCom recommends a total reserve usage for FY2013 not to exceed \$1.5mm. This is a significant decrease from previous years, given the projected \$7.3 million in Tier 1 reserves.
- ❑ As in the private sector, programs that are not performing, i.e. not meeting financial expectations should be very carefully analyzed. For example, continued shortfalls in revenues available to the Nursing Service should be monitored with a specific proposal available not later than Annual Town Meeting to restructure, discontinue, or fund sustainably. For example, continued shortfalls in revenues available to the Nursing Service should be monitored with a specific proposal available not later than Annual Town Meeting to restructure, discontinue, or fund sustainably.

- ❑ There is no need for an operating override and no other override (capital or debt exclusion) is on the immediate horizon. Certain CPA related projects are of a size and duration that bonding, should they be approved, would be appropriate given the historically low interest rates and the desire to match the duration of assets and liabilities.
- ❑ Capital plans should focus on maintaining existing assets and, if essential, should be funded within Proposition 2 ½ limits

Driver Expectations

Unlike in the recent past, “budget drivers” are not as impactful. This year is a year of “choice.” This year, we have the choice of where our dollars should go:

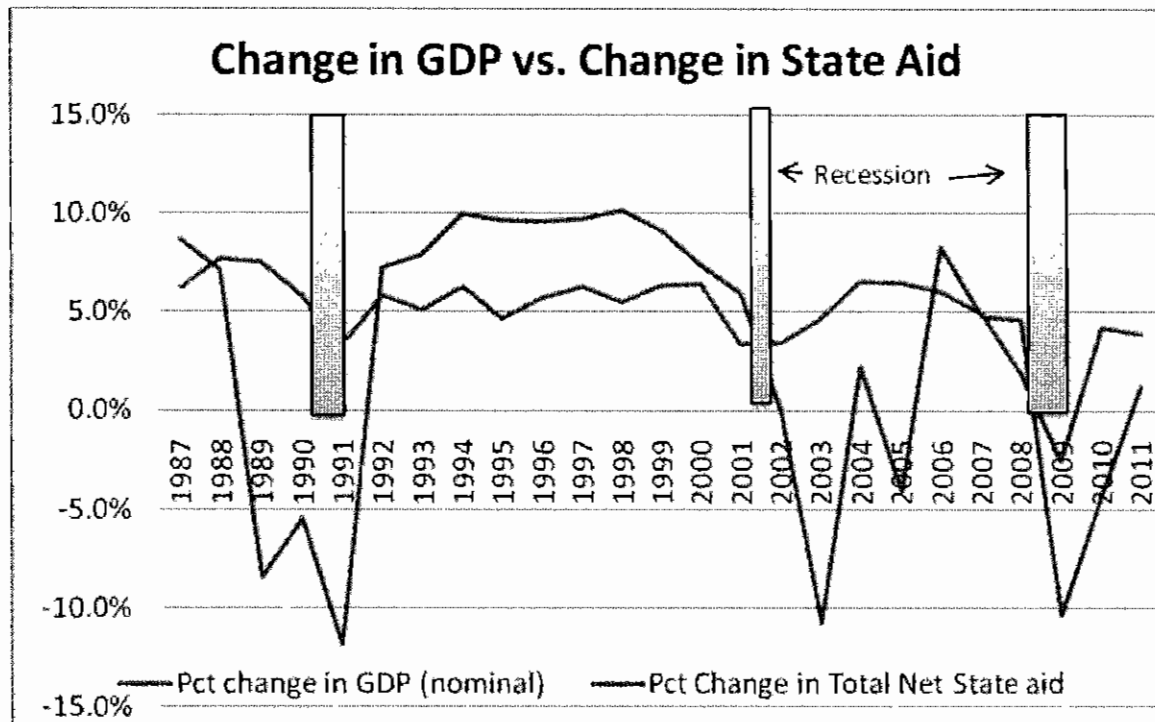
- ❑ Labor Costs. Given the recent contract settlements, the cost of an individual employee is well-known. Total compensation must be managed in the context of those contracts, but certainty exists to a greater deal than in the past.
- ❑ Personnel. Growth in personnel for both major operating entities should be tied into the settlements of labor negotiations. With limited dollars available for labor costs, any increase in individual compensation will need to be offset by changes in other elements, such as headcount.
- ❑ Chapter 70 funding has been steady. At this time, local aid allocated via the Chapter 70 formula should be budgeted at the same formulaic level for FY2013.
- ❑ Health insurance expense. The Trustees of the Health Insurance Trust believe that underlying health inflation is running at about 4%. We do not have any information to contradict this assumption about costs, although the Trust itself is in strong financial position. As with last year, this could be an area of savings as certainty increases.

Revenue Split

- ❑ The revenue split in place should be maintained.
- ❑ School population numbers are trending down, which may impact the split in the future.

Citizen Expectations with respect to Taxes and Services

- ❑ Revenue from property taxes is our most stable source. For 3 of the last 5 years, we have not raised taxes to the 2 ½% level.
- ❑ Given the UAAL, at this time, it is not prudent to consider a taxation level below the 2 ½% trigger point.
- ❑ In view of the magnitude of the OPEB liability and its impact on all future budgets, citizens should understand that the current revenue sources, including property taxes, will not continue to support the current service level. Inherent in this imbalance will be choices among current services, proposed increases in service and raising additional revenues.
- ❑ In contrast, for the current FY2012, it is possible that another reduction in the tax levy is still an opportunity, given the E&D over funding.
- ❑ It is likely that taxpayers will continue to face difficulty in paying taxes, so all abatement programs must be actively advertised.



BUDGET DAY - Saturday 1/28/12, RIGJHS Library (prelim agenda 1/13/12)

7.3.3

Time	Subject Area	Presenter(s)
9:00	Introduction	Dr. Mills
9:15	Finance	Don Aicardi
9:30	Pupil Services	Liza Huber
10:15	Human Resources	Marie Altieri
10:30	BREAK	
10:45	Curriculum/Technology	Deb Bookis & Amy Bisiewicz
11:15	High School & Junior High	Alixé Callen & Craig Hardimon
noon	LUNCH	
12:45	Facilities	J.D. Head
1:00	Finance	Don Aicardi
1:15	Community Ed	Erin Bettez
1:30	AB Budget Discussion/Q & A	
1:45	AB Adjourns	
1:45	APS	Deb Bookis, Mark Hickey, Diana Woodruff, & Principals
		Liza Huber & Principals
		Dr. Mills & Principals
2:30	APS Budget Discussion/ Q & A	Dr. Mills
3:00	Close	

Acton Public School District

School Committee Meeting
January 19, 2012

FY'13 Budget Review

Use of Reserves

Use of Acton Reserves

Acton is committed to using reserves to help maintain its operating budgets until economy improves.

Many financially knowledgeable citizens are concerned with this practice.

Use of Acton Reserves

Acton has worked very hard to build its reserves.

Acton continued to use reserves when the economy slowed in 2007 and started to contract in 2008.

Acton maintained services and its school systems when local receipts dropped and state aid was cut.

Acton is committed to using reserves to help maintain its operating budgets until economy improves.

Many financially knowledgeable citizens are concerned with this practice.

Use of Acton Reserves

Acton is committed to using reserves to help maintain its operating budgets until economy improves.

Many financially knowledgeable citizens are concerned with this practice.

By living within Prop. 2 ½ revenue, by using available federal grants, and using reserves, Acton's services have not seen severely eroded and its school system remains strong.

When the economy improves, local receipts should return to pre-recession levels which should aid efforts to lower reserve use.

Expenditure levels will need to find a revised, nuanced relationship between Acton municipal and schools and addressing (for the first time) our long-term OPEB liability.

A delicate balance between declining use of reserves, improving local receipts, unrestricted state aid and eventually, new casino aid that will eventually flow to municipalities, will have to be struck in the next several years.

Use of Acton Reserves

FY'11

Acton Share of ABRSD E&D	\$748k
NESWC	\$800k
Free Cash (Non-Recurring)	\$753k
Free Cash-Budget Supporting	<u>\$1.0m</u>
TOTAL USED:	\$3.2m

Use of Acton Reserves

FY'12

Acton Share of ABRSD E&D	\$277k
NESWC	\$576k
Free Cash-Budget Supporting	<u>\$1.0m</u>
TOTAL USED:	\$1.853m

Use of Acton Reserves

FY'13 Proposed (Current ALG Plan)

Acton Share of ABRSD E&D	\$621k
NESWC	\$391k
Free Cash-Nursing Enterprise Support (TBD at April 2012 Town Meeting)	\$200k
Free Cash-Budget Supporting	<u>\$680k</u>
CURRENT TOTAL:	\$1.8m

Use of Acton Reserves

From FY'11 Actual to FY'13 Proposed

FY'11 For Budget Operating: \$2.5m

FY'12 For Budget Operating: \$1.85m

FY'13 For Budget Operating (Current): \$1.6m

Review of Total Reserves

Beginning Balance of Reserves

Entering FY'12: \$8.3m

ESTIMATED: Beginning Balance of
Reserves Entering FY'13: \$9.7m*

*DOR certified Free Cash, Friday, December 2,
2011; E&D by February, 2012

APS FY'13 Preliminary Budget

Decisions That Are Keeping Us All
Awake At Night

APS FY'13 Preliminary Budget

What is the appropriate amount of reserves that is prudent for use in this year's budget?

What about use in future budgets?

Will we still be able to replenish at the current rate?

APS FY'13 Preliminary Budget

Cognizant of reserve use, what is the amount above level service that we are willing to support this year - how much of the FY'13 Investment Budget should be approved?

APS FY'13 Preliminary Budget

How solid are our FY'13 revenue estimates?

Tax levy currently at full allowable amount

Local Receipts trends?

Governor's State Budget - January 25th

APS FY'13 Preliminary Budget

New Kid In Town: OPEB Liability

Should an OPEB trust be created?

If so, how much for this year?

Long Term View: Beginning to Address
OPEB Liability While Understanding That It
Will Compete Against Our Future Needs
While We Continue to Put Money Into The
Trust

APS FY'13 Preliminary Budget

Long Term Financial Spending Trends:
Future Deficits Look Troubling...

Are those estimates of revenue and
spending trends alarmist or dead on?

Can we maintain services, continue to lower
our reserves, and begin to address our
OPEB Liability all at the same time if
spending trends turn out to be high?

APS FY'13 Preliminary Budget

Last Week's Proposal To ALG
Intended To:

- a) Promote Debate,
- b) Highlight Tradeoffs,
- c) Review Mutual Concerns
- d) Position Acton for Endgame

APS FY'13 Preliminary Budget

December 8, 2011 ALG Spreadsheet Deficit:
(\$532k)

January 11, 2012 ALG Spreadsheet Deficit:
(\$193k)

APS FY'13 Preliminary Budget

Proposal allowed all preliminary budgets (Municipal and Schools) to stand as is for the moment;

Would establish \$500k for OPEB liability;

Would increase on paper the use of reserves from \$1.8m to \$2.6 m in order to balance before State budget comes out on January 25th;

THEN, AT THE END OF JANUARY.....

APS FY'13 Preliminary Budget

If State Aid were to come in lower than estimated, reductions from operating budgets and/or OPEB contribution up to \$500k; if higher than \$500k, would return to ALG for direction;

Health Insurance design changes could be directed towards OPEB, not added to operating budgets;

All positive revenues and/or spending reductions would be focused towards lowering use of reserves or towards OPEB; not added to operating budgets.

APS FY'13 Preliminary Budget

GOAL OF PROPOSAL: Roadmap For The Next Month

Find balance ...

- 1) 1st Down Payment for OPEB liability;
- 2) Continue process of full review by interested committees of investment budgets;
- 3) Maintain sensitivity to reserve use

APS FY'13 Preliminary Budget

Coming Attractions:

MMA Annual Conference-Gov's Patrick's First
Hint of FY'13 Budget: Friday, January 20th;

Review of FY'13 Budgets Continues By APS
and ASRSD Committees;

Review of FY'13 Budgets By Acton Fin Com;
Health Insurance Design Changes?;

“Budget Saturday” Review of APS & ABRSD
FY'13 Preliminary Budgets: January 28th

APS FY'13 Preliminary Budget

APS FY'13 Budget

APS FY'13 Preliminary Budget

Direction for FY'13:

- 1) Calculate Level Service with eye on all possible savings;
- 2) Investment Budget linked to Long Range Strategic Plan.

APS FY'13 Preliminary Budget (in thousands)

	APS
FY'12 Final	\$26,113
FY'13 Preliminary Budget	\$27,266
\$ Change from Final FY'12	\$1.152
% Change from Final FY'12	4.41%

APS Preliminary Budget FY'13 Estimate

APS Level Service Budget (December, 2011) 3.3%

APS Level Service Budget (Jan 12) 2.56%

Investment Budget Recommendations 1.85%

FY'13 APS Preliminary Budget 4.41%

FY'13 APS Preliminary Budget

FY'13 Investment Budget Requests

FY'13 APS Preliminary Budget

Investment Budget Requests

Staff: \$108,000 In Classroom Assistants
(\$21,600 per school)
.4 FTE ELE teacher (\$26k)
1.0 FTE SPED Teacher New Resource Room at
Douglas (\$56k)
1.0 FTE Music Specialist (\$45k)
1.0 FTE Physical Ed (\$58k)
.6 FTE Art Specialist (\$43k)

Other: .5 FTE Budget Analyst (\$30k)
Health Insurance For Six Potential New Positions **EST**
(\$89k)

TOTAL: \$487k

Current Unaddressed Needs

APS Personnel Needs Not Yet Included in FY'13 Level Service (Prioritized)

Total Cost

- **K-6 ELA Coordinator/Literacy Coach**
Salary and Benefits \$70K
- **K-6 School Psychologists**
Salary and Benefits \$80K
- **.6 FTE Ed Tech Support (Conant, McCarthy Towne, and Merriam)**
Salary and Benefits \$112K
- **.5 FTE Desktop Support**
Salary and Benefits \$30K
- 1 Additional Day for Professional Development** \$75k

School Committee FY'13 Budget Schedule

Upcoming Schedule

Balance of School Committee FY'13 Budget Schedule

- 1/19/12 Discussion of preliminary budget with APS School Committee
- 1/28/12 Joint School Committee Saturday All-Day Session with presentations by school leaders; Selectmen / Finance Committee / public at large all encouraged to attend
- 2/2/12 AB Regional School Committee budget hearing (required by law) - *Possible Budget Vote*
- 2/16/12 APS School Committee budget hearing (required by law) - *Possible Budget Vote*
Possible Joint School Committee meeting if vote needed on Regional budget/assessments (2/18/12 is deadline to vote according to Regional Agreement)

Saturday, January 28th

9 a.m. – 3 p.m.

R.J. Grey Junior High Library

School Department Budget Presentation

9:15	Budget Overview.....	Don Aicardi
9:30	Pupil Services.....	Liza Huber
10:15	Human Resources.....	Marie Altieri
10:45	Technology/Curriculum...	Amy Bisiewicz & Deb Bookis
11:15	Junior & Senior High	Alix Callen & Craig Hardimon
12:00	Lunch	
12:45	Facilities.....	JD Head
1:00	Finance.....	Don Aicardi
1:15	Community Education...	Erin Bettez
1:45	APS.....	Deb Bookis
		Mark Hickey & Diana Woodruff
		Liza Huber
		Damian Sugrue
		Christopher Whitbeck
		Lynne Newman
		David Krane
		Edward Kaufman
2:30	General Discussion	

Personnel Office
Acton Public Schools
Acton-Boxborough Regional Schools

TO: Acton Public School Committee
DATE: January 19, 2012
FROM: Marie Altieri
SUBJECT: Classroom Availability Projections

Please see the attached chart which shows projections for classroom availability 2010 – 2020. In the next ten years, we project that we will be able to reduce ten sections, resulting in 9.5 available classrooms. Three of those classrooms will become available at Merriam as the “fourth” Merriam sections graduate; two of them will become available at Gates as we make room for Art and Music; and there will be 4.5 additional classrooms where we have not yet determined the school. In this period of time, class sizes will be reduced from a K-6 average of 23.2 to a K-6 average of 21.8. There will be a brief presentation of this information at your meeting on Thursday night.

Classroom Availability Projections 2010-2019

Jan 19, 2012

Year	Kinder garten	Number of Kindergartens	Kindergarten Class Size	Total K-6 Enrollment	Total Number of Sections	Average Class Size	Additional/Reduced Classrooms	Available Classrooms	Use For Extra Classrooms
2010-2011	328	16	20.5	2507	108	23.2	Four Sections Merriam Grades K, 1, 6	None	
2011-2012	301	15	20.1	2448	107	22.9	Four Sections Merriam Grades 1, 2	One at Merriam	Merriam Before/After School Prog
2012-2013	288	15	19.2	2435	107	22.8	Four Sections Merriam Grades 2, 3	One at Merriam	
2013-2014	276	14	19.7	2397	106	22.6	Four Sections Merriam Grades 3, 4 Two Sections Gates K	One at Merriam 1/2 Day at Gates	
2014-2015	277	14	19.8	2372	105	22.6	Four Sections Merriam Grades 4, 5 Two Sections Gates K, 1	One at Merriam One and 1/2 at Gates	Gates Art OR Music
2015-2016	273	14	19.5	2329	104	22.4	Four Sections Merriam Grades 5, 6 Two Sections Gates 1, 2 Two Sections K School TBD	One at Merriam Two at Gates 1/2 Classroom TBD	Gates Art and Music
2016-2017	258	14	18.4	2255	102	22.1	Four Sections Merriam Grade 6 Two Sections Gates 2, 3 Two Sections K, 1 School TBD	Two at Merriam Two at Gates One and 1/2 TBD	One and 1/2 available for All Day K OR SpEd OR Ext Day OR Computer Lab
2017-2018	263	14	18.8	2190	100	21.9	Two Sections Gates 3, 4 Two Sections K, 1, 2 School(s) TBD	Three at Merriam Two at Gates Two and 1/2 TBD	Two and 1/2 TBD
2018-2019	270	14	19.3	2150	99	21.7	Two Sections Gates 4, 5 Two Sections K, 1, 2 , 3 School(s) TBD	Three at Merriam Two at Gates Three and 1/2 TBD	Three and 1/2 TBD
2019-2020	275	14	19.6	2134	98	21.8	Two Sections Gates 5, 6 Two Sections K, 1, 2 , 3, 4 School(s) TBD	Three at Merriam Two at Gates Four and 1/2 TBD	Four and 1/2 TBD

*All enrollment numbers are based on Ashton Projections Plus Projected Staff Children

Personnel Office
Acton Public Schools
Acton-Boxborough Regional Schools

TO: Acton Public School Committee
DATE: January 19, 2012
FROM: Marie Altieri
SUBJECT: Potential Acton Students Enrolling in Boxborough

Please see the attached memo which describes the potential for Acton families to transfer or enroll in Boxborough's Blanchard elementary school. The memo was sent by principals to all current APS families last week. In addition, at the January 10, 2012 kindergarten information night, this was part of the presentation to new parents, and along with the other handouts, these families received the memo. The deadline to notify us is Wednesday January 18. As of today, Tuesday January 17, there are four children who would like to consider this option.

1 Kindergarten
1 Third Grade
2 Fourth Grade

We will continue to keep you posted about levels of interest as we go through the kindergarten enrollment process.

Dear Parents,

January 10, 2012

Depending on available seats, we may be able to allow some Acton elementary students to enroll in Boxborough's Blanchard Elementary School in certain grade levels for the 2012-2013 school year. Blanchard would be an option in addition to Acton's five elementary schools. If students do enroll, they will be able to attend Blanchard through sixth grade and then come to R. J. Grey for Jr. High School. If you think that this might be an option that you would be interested in, please fill out the form below and mail it to the address listed by January 18, 2012, or send an email to Marie Altieri at maltieri@mail.ab.mec.edu with the information. This will not be binding, but will be a way for us to gauge interest. We will notify you with next steps.

Student's Name: _____

Date of Birth: _____

Grade Level 2012-2013: _____

Siblings: (Indicate Grade Level for 2012-2013 year. Put a checkmark next to any/all whom you would consider enrolling in Blanchard.

Name: _____ Date of Birth: _____ Grade: _____

Name: _____ Date of Birth: _____ Grade: _____

Name: _____ Date of Birth: _____ Grade: _____

Parent(s)/Guardian(s) Names: _____

Phone Number(s): _____

Email Contacts: _____

Email by **January 18, 2012** to Marie Altieri at maltieri@mail.ab.mec.edu or Mail to
Marie Altieri
Acton-Boxborough Regional Schools
Central Office
16 Charter Road
Acton, MA 01720

**Seats Available for 2012-2013
Blanchard Memorial School, Boxborough**

Grade Level	Current est. enrollment for 2012-13	Seats available	Est. Total enrollment
Kindergarten	unknown	unknown	unknown
Grade One	19, 19, 20	none	19, 19, 20
Grade Two	17, 17, 17	3 seats	18, 18, 18
Grade Three	18, 18, 18	3 seats	19, 19, 19
Grade Four	21, 22, 23	none	22, 22, 22
Grade Five	16, 16, 17, 17	10 seats	19, 19, 19, 19
Grade Six	25, 25, 25	none	25, 25, 25
If we do not eliminate a section of Grade 6			
	18, 19, 19, 19	5 seats	20, 20, 20, 20

This would allow 21 students from APS to enroll.

APS SC

12/9/11

3 of 4

Acton Public Schools
Class Size Projections
2012-2013

	Number of Students	Number of Sections	Average Class Size	Range
Kindergarten	287	15	19.1	19
Grade One	322	15	21.5	21-22
Grade Two	357	16	22.3	22-23
Grade Three	372	16	23.3	23-24
Grade Four	361	15	24.1	24
Grade Five	358	15	23.9	24
Grade Six	378	15	25.2	25-26

Merriam School

Eleven Charter Road, Acton, MA 01720

Telephone: 978-264-3371

Email: mmcdowell@mail.ab.mec.edu

Dr. Stephen Mills
Superintendent of Schools
16 Charter Road
Acton Public Schools
Acton, MA 01720

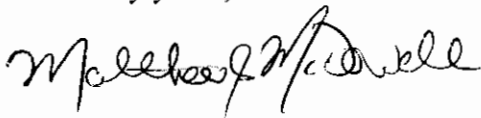
December 14, 2011

Dear Dr. Mills,

The Merriam School has received a grant in the amount of \$1,000 from IBM. IBM gives Community Grants to schools and other organizations where one or more employees volunteer at least 40 hours in a calendar year. We identified a parent who had done this combining time spent in classrooms and in computer lab, on field trips, and working as a room parent. It is our intention to use this money for a combined professional development initiative with our colleagues at McCarthy-Towne School.

Please present this gift to the School Committee for their approval at the next School Committee meeting. Thank you.

Sincerely yours,

A handwritten signature in black ink, appearing to read 'Matthew McDowell', written in a cursive style.

Matthew McDowell
Assistant Principal
Merriam School

McCarthy-Towne School

Eleven Charter Road, Acton, MA 01720

Telephone: 978-264-3377 FAX: 978-264-4098

Email: mmcdowell@mail.ab.mec.edu

Dr. Stephen Mills
Superintendent of Schools
16 Charter Road
Acton Public Schools
Acton, MA 01720

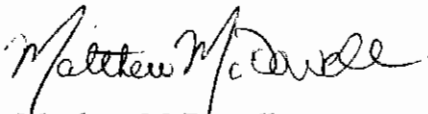
December 14, 2011

Dear Dr. Mills,

The McCarthy-Towne School has received a grant in the amount of \$1,000 from IBM. IBM gives Community Grants to schools and other organizations where one or more employees volunteer at least 40 hours in a calendar year. We identified a parent who had done this combining time spent in classrooms and in computer lab, on field trips, and working as a room parent. It is our intention to use this money for a combined professional development initiative with our colleagues at Merriam School.

Please present this gift to the School Committee for their approval at the next School Committee meeting. Thank you.

Sincerely yours,



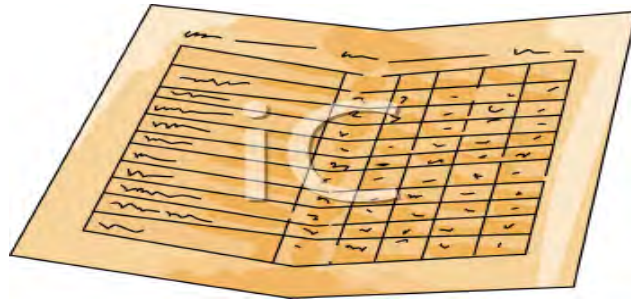
Matthew McDowell
Assistant Principal
McCarthy-Towne School

**MONTHLY REPORTING OF
ELL STUDENT POPULATION**

Acton Public Schools
January 1, 2012

Category	Total as of 12/1/2011	Additions	Subtractions	Total as of 1/1/2012
Conant	27	0	0	27
Douglas	28	0	-6	22
Gates	4	0	0	4
McCarthy-Towne	22	+1	0	23
Merriam	28	0	-2	26
APS TOTAL	109	+1	-8	102

OnTeam Winter 2011 – 2012



I CAN..... The Theme for Empowerment & Achievement *How do we get there through the Progress Report?*

Dear Parents and Guardians,

Happy New Year! As your child moved through the bustling times of the holiday season, I am hopeful that you had an opportunity to observe the skills gained during the school year and how they were integrated into everyday conversations and activities within your home. This is a tribute to you – for providing an atmosphere that reinforces good behavior, skills in thinking, and a place, which is comfortable to talk and feel safe.

Similarly, our schools have an equal obligation and are accountable to you as parents and guardians for the same type of training and modeling. The OnTeam Winter 2011-2012 newsletter gives us an opportunity to reflect on how learning is best integrated across settings, and address some issues that move us forward in sustaining better communication with the home. An improved sense of reporting both internally within the schools as well as externally to the home offers a seamless way of openly communicating regarding student achievement. Both systems are important in reaching our district SMART goal in formative assessment. How do we know our children are learning? How do students optimally achieve success in curriculum and demonstrate mastery of instruction by incorporating specialized instruction?

Most students in special education attend regular education classes and receive instruction and support from specialists and clinicians in a variety of settings. Parents and guardians have the opportunity to discuss progress of their child with the teacher, specialist, clinician, or administrator at anytime, formally and/or informally. Sometimes, parents of students with special needs choose to wait and examine progress reports (required by the IDEA regulations), that are shared on the same schedule as building based report cards. Specifically, this progress report articulates your child's progress, measured against his/her accomplishment of the goals and objectives set forth in the IEP. What is sometimes less obvious is the requirement that special education and regular education teachers should be collaborating regarding these reports and figuring out how each student's goals are met in the regular education classes. We are taking steps to consider how we can improve the integration of the progress report, so that parents and

guardians can readily monitor how these skills are applied to regular education classes. We are further taking steps to ensure that required accommodations are implemented in the regular education curriculum and specialized instruction; from an ideal point of view, a child's application of skills is applied in all settings, automatically. Although we have many progress reports that fully integrate all requirements, I believe we can improve on our reporting system.

We want parents to understand how their child is progressing toward the annual goals outlined in the IEP, and to determine whether the progress is sufficient to meet those goals. These goals are achieved through the sharing of progress reports that are collaboratively discussed with regular and special education teachers.

For example, an IEP objective may indicate that a 4th grade student will use graphic organizers to write a 5-paragraph report in science by sequencing sentences with a topic sentence, supporting sentences, and a conclusion, as part of the student's overall communication goal. That annual goal is supported through the special education teacher with benchmarks or rubrics through good instruction. The regular education teacher, also aware of the IEP goal, works to that end with the student and others on that written language goal. But, in this diagnostic teaching model, the child needs assistance to develop an outline or graphic organizer to enhance learning. Once developed, the student can proceed with some assistance and feedback. The student moves from a written outline (with support) to independently developing his/her own written outline. Although this is an oversimplification, I simply want to make a point here. The student receives specifically designed instruction in special education because he/she has a disability in writing and/or executive functioning. That instruction is applied and reinforced in regular education. The skills of the regular education teacher are imperative because the techniques that are used with this child can be applied to all children in the classroom. Graphic organizers, written outlines, practice, are all instructive aides to reach mastery of the regular education curriculum. When we add the content of science, its frameworks and standards, we have a student who can access the knowledge of content areas and through the cooperative working efforts of regular and special education teachers, we can help a child compete in a regular education classroom with his peers. Those regular education teachers are really instructional clinicians because they daily assess and strategize ways to help children achieve in the classroom through effective instruction, accommodations and modifications, whenever and wherever necessary. That mastery assumes written back up through the progress report by answering the question of how well the child must perform to achieve the goals stated through the IEP process. These evaluation criteria are measurable, outlined by the IEP Team, including the home, with down to earth criteria (80% accuracy, 16 out of 20 words correct, with guided support, independently, etc.)

In other words, the goal is for special and regular education teachers to review the IEP goals and objectives, collaborate on the challenges of newly learned strategies in regular and special education, share how these strategies support the special education child (and others in regular education), and implement these strategies by measuring the effectiveness of class work and assignments, supplemented by ways of assessing mastery

(tests, portfolio, writing journal, production of a science report, etc. and standardized assessments through the IEP process {evaluation instruments} or high stakes testing).

Federal law indicates that all students should participate in the regular education curriculum, i.e., the same curriculum in which their non-disabled students are learning. The IEP does not design a specific curriculum; it designs the services that are necessary to make documented and measurable progress in regular education.

What can parents do?

- It is always helpful to become better informed about the regular education curriculum, as well as the Massachusetts Curriculum Frameworks <http://www.doe.mass.edu/frameworks/current.html> With this level of understanding, Team members become much more instrumental in discussing how a student can participate in the regular education classroom. The emphasis is on “CAN”.
- Bring questions to the meeting such as: How do you measure my child’s progress in regular education based upon the IEP goals and objectives? How does the regular education classroom teacher implement those goals in the regular education classroom? How are they measured? What accommodations and/or modifications are required? Where does my child fit into the demands of the curriculum? Is my child meeting the classroom standard? Is my child on track for meeting grade level requirements/diploma requirements?

What can we (the school) do?

- We want to enhance our progress reports that are jargon-free, helpful to parents, and integrate special and regular education objectives, while fulfilling our responsibilities under the regulations.
- We will review the progress reporting system by randomly selecting teams and their progress reports to ensure that there are interconnections between the goals of the IEP and how they are implemented in the regular education classroom. Students in the regular classroom who have IEP goals can maximize and integrate the above strategies (example used in fourth grade) by using the regular education curriculum.
- Should we identify inconsistencies in reporting in any of our schools, we will enhance our training and discussions with our staff based upon this data.

In summary, the progress report is a mechanism that serves as a measurement of IEP goals. But, we must go beyond that yardstick and provide a written platform for integrating these goals into the regular education curriculum. Whereas the underlying assumptions of collaboration and cooperation between regular and special education are expected, we will plan to offer discussion and further training for those areas that will enhance that vision.

We believe all children can learn to the best of their abilities and demonstrate those skills in regular education classrooms with special education support. Every child must have the opportunity to participate, observe, investigate, inquire, compare and contrast data,

and explore. We want to create a learning environment that encourages collaborative learning in our competitive society so that our children are able to learn throughout their lives. Ultimately, we want them to love learning, despite the challenges.

A special thank you is given to our Special Education Parent Advisory Council who earmarked this area for discussion through the Parent Survey, 2011.

Happy New Year,

Liza Huber

Director of Pupil Services



Co-Chair: Nancy Sherburne (978) 635-0968 nsherburne@mindspring.com

Co-Chair: Bill Guthlein (978) 263-0610 guthw@aol.com

AB SpEd PAC Website <http://www.abspedpac.org>

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	ORIGINAL APPROP	TRANSFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED

1005 GENERAL FUND SCHOOL							

01 SALARIES, TEACHING	12,068,520	51,100	12,119,620	4,935,865.16	7,162,463.66	21,291.18	99.8%
02 SALARIES, PRINCIPALS	722,790	0	722,790	387,687.30	335,072.70	30.00	100.0%
03 SALARIES, CENTRAL AD	409,758	0	409,758	228,015.06	195,246.81	-13,503.87	103.3%
04 SALARIES, SUPP STAFF	3,058,357	96,900	3,155,257	1,396,686.13	1,724,786.10	33,784.77	98.9%
06 SALARIES, BUILDINGS	254,609	0	254,609	167,563.69	101,063.90	-14,018.59	105.5%
07 SALARIES, CUSTODIAL	636,492	0	636,492	321,473.99	248,127.93	66,890.08	89.5%
08 SALARIES, HOME INSTR	1,019	0	1,019	.00	.00	1,019.00	.0%
09 SALARIES, SUBSTITUTE	375,375	-2,000	373,375	144,130.52	5,584.10	223,660.38	40.1%
10 FRINGES, COURSE REIM	17,000	0	17,000	8,644.00	6,436.84	1,919.16	88.7%
11 FRINGES, HEALTH INSU	3,697,937	-29,000	3,668,937	2,101,425.57	.00	1,567,511.43	57.3%
16 INSTRUCTIONAL SUPPLI	243,860	500	244,360	135,959.38	24,468.86	83,931.76	65.7%
17 INSTRUCTIONAL TEXTBO	81,613	2,000	83,613	46,669.59	4,591.38	32,352.03	61.3%
18 INSTRUCTIONAL, LIBRA	16,425	0	16,425	5,911.91	2,029.29	8,483.80	48.3%
19 OTHER, CAPITAL OUTLA	272,850	-7,500	265,350	187,999.00	9,124.46	68,226.54	74.3%
OTHER, MAINTENANCE B	212,003	0	212,003	115,232.91	14,167.18	82,602.91	61.0%
OTHER, MAINTENANCE O	93,828	0	93,828	48,152.50	16,744.64	28,930.86	69.2%
26 OTHER, LEGAL SERVICE	58,000	0	58,000	21,470.00	1,250.00	35,280.00	39.2%
27 OTHER, ADMIN SUPPLIE	197,464	5,000	202,464	95,184.11	26,243.26	81,036.63	60.0%
29 OTHER, CUSTODIAL SUP	46,700	0	46,700	50,734.48	.00	-4,034.48	108.6%
30 OTHER, SPED TRANSPOR	510,715	0	510,715	510,715.00	.00	.00	100.0%
31 OTHER, STUDENT TRANS	349,236	0	349,236	218,536.60	7,014.68	123,684.72	64.6%
32 OTHER, TRAVEL	14,638	0	14,638	9,121.06	125.00	5,391.94	63.2%
33 OTHER, SPED TUITION/	1,920,318	-25,000	1,895,318	614,217.25	1,291,097.76	-9,997.01	100.5%
34 OTHER, UTILITIES	854,212	-92,000	762,212	275,772.60	21,800.14	464,639.26	39.0%
TOTAL GENERAL FUND SCHOOL	26,113,719	0	26,113,719	12,027,167.81	11,197,438.69	2,889,112.50	88.9%
GRAND TOTAL	26,113,719	0	26,113,719	12,027,167.81	11,197,438.69	2,889,112.50	88.9%

** END OF REPORT - Generated by Denise Kelly **

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	ORIGINAL APPROP	TRANSFERS/ ADJUSTMENTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED

1005 GENERAL FUND SCHOOL							

05 SW SPECIAL EDUCATION							

05010501 52401 SPED LEGAL SERVICES	38,000	0	38,000	8,750.00	1,250.00	28,000.00	26.3%
11040501 51502 PS SECRETARY	71,443	0	71,443	38,208.00	33,089.14	145.86	99.8%
14040501 51411 SPED CHAIRPERSON	94,760	0	94,760	50,829.10	43,930.90	.00	100.0%
14040524 51419 COORDINATOR	27,917	0	27,917	14,974.40	12,942.10	.50	100.0%
14050503 51433 SUMMER PROGRAM STIP	65,000	-25,893	39,107	30,231.10	.00	8,875.44	77.3%
14050504 51615 SUMMER SPED ASST	65,000	22,218	87,218	87,218.46	.00	.00	100.0%
14050505 52468 TRANSLATION	10,000	0	10,000	3,725.50	6,274.50	.00	100.0%
14050509 54305 SPED TEXTBOOKS	2,371	0	2,371	2,439.70	.00	-68.70	102.9%*
14050510 54302 OCCUPATIONAL THERAP	822	0	822	846.93	.00	-24.93	103.0%*
14050511 52409 IN SERVICE CONFEREN	1,152	0	1,152	2,181.50	200.00	-1,229.50	206.7%*
14050518 52427 PUBLIC TUITION	0	0	0	4,300.00	.00	-4,300.00	100.0%*
050520 51409 REFERRAL TO SPECIAL	30,000	0	30,000	10,769.02	.00	19,230.98	35.9%
050521 52443 SPED REFERRAL TO SP	104,586	25,000	129,586	60,491.50	76,322.98	-7,228.48	105.6%*
14050521 52452 SUMMER PROGRAM, CS	25,000	-25,000	0	.00	.00	.00	.0%
14050522 52462 PS SEC 504 CONTR SV	996	0	996	.00	.00	996.00	.0%
TOTAL SW SPECIAL EDUCATION	537,047	-3,675	533,372	314,965.21	174,009.62	44,397.17	91.7%

18 SPECIAL EDUCATION							

05051801 52416 SPED INDEP EVALUATI	4,840	0	4,840	761.50	3,602.00	476.50	90.2%
05051802 52404 SPED PERIODICALS/SU	780	0	780	589.72	.00	190.28	75.6%
05051802 52406 SPED POSTAGE	2,614	0	2,614	2,159.97	454.03	.00	100.0%
05051802 52407 SPED INSVC CONFEREN	341	0	341	341.00	.00	.00	100.0%
05051802 52408 SPED TRAVEL - LOCAL	176	0	176	72.31	.00	103.69	41.1%
05051802 52410 SPED DUES & FEES	296	0	296	496.00	65.00	-265.00	189.5%*
05051802 52455 SPED MNT COPY EQUIP	3,371	0	3,371	721.93	1,953.07	696.00	79.4%
05051802 52456 SPED MNT OFFICE EQU	275	0	275	.00	.00	275.00	.0%
05051803 54301 SPED OFFICE SUPPLIE	3,402	0	3,402	3,331.22	546.76	-475.98	114.0%*
05051804 58708 SPED OUTLAY EQUIP	20,715	0	20,715	6,348.61	766.39	13,600.00	34.3%
05051805 52424 MEDICAID SERVICES	1,040	0	1,040	.00	.00	1,040.00	.0%
05051806 52413 SPED MEDICAL SERVIC	2,421	0	2,421	1,097.48	.00	1,323.52	45.3%
05051807 52425 SPED TUITION - CASE	375,715	0	375,715	16,000.00	375,715.00	-16,000.00	104.3%*
05051808 52426 SPED TUITION PRIVAT	1,052,704	0	1,052,704	185,813.23	590,831.60	276,059.17	73.8%
05051808 52465 CIRCUIT BREAKER TUI	-347,500	0	-347,500	.00	.00	-347,500.00	.0%*

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	ORIGINAL APPROP	TRANSFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED
05051810 52430 CO: SPED CASE TRANS	510,715	0	510,715	510,715.00	.00	.00	100.0%
06041801 51408 SPED TEACHER	298,055	0	298,055	114,526.50	183,242.50	286.00	99.9%
06041802 51418 SPEECH TEACHER	79,581	0	79,581	30,608.00	48,972.97	.03	100.0%
06041803 51624 SPED EDUCATION ASST	186,499	0	186,499	80,479.89	109,654.15	-3,635.04	101.9%
06051801 54305 RES TEXTBOOKS	521	0	521	734.74	.00	-213.74	141.0%
06051802 54332 EDUC NEEDS SUPPLIES	575	0	575	443.56	.00	131.44	77.1%
06051802 54333 SPEECH SUPPLIES	429	0	429	227.85	.00	201.15	53.1%
07041801 51408 SPED TEACHER	163,901	0	163,901	70,214.50	93,685.50	1.00	100.0%
07041802 51418 SPEECH TEACHER	95,315	0	95,315	36,659.60	58,655.40	.00	100.0%
07041803 51624 SPED EDUCATION ASST	87,754	0	87,754	25,678.46	47,728.74	14,346.80	83.7%
07051801 54305 RES TEXTBOOKS	521	0	521	539.10	.00	-18.10	103.5%
07051801 54334 EDUC NEEDS TEXTS	330	0	330	619.85	.00	-289.85	187.8%
07051802 54332 EDUC NEEDS SUPPLIES	575	0	575	116.60	265.00	193.40	66.4%
07051802 54333 SPEECH SUPPLIES	423	0	423	330.20	.00	92.80	78.1%
08041801 51408 SPED TEACHER	211,774	0	211,774	81,850.00	130,959.94	-1,035.94	100.5%
08041802 51418 SPEECH TEACHER	53,341	0	53,341	20,953.80	33,526.20	-1,139.00	102.1%
08041803 51624 SPED EDUCATION ASST	114,614	0	114,614	60,990.50	82,628.52	-29,005.02	125.3%
08051801 54305 RES TEXTBOOKS	521	0	521	1,093.06	.00	-572.06	209.8%
08051802 54332 EDUC NEEDS SUPPLIES	479	0	479	347.90	.00	131.10	72.6%
08051802 54333 SPEECH SUPPLIES	429	0	429	.00	.00	429.00	.0%
09041801 51408 SPED TEACHER	276,769	0	276,769	107,700.00	172,319.96	-3,250.96	101.2%
09041802 51418 SPEECH TEACHER	89,745	0	89,745	35,855.50	53,889.50	.00	100.0%
09041803 51624 SPED EDUCATION ASST	94,024	0	94,024	43,092.38	57,904.14	-6,972.52	107.4%
09051801 54334 EDUC NEEDS TEXTS	622	0	622	622.38	.00	-.38	100.1%
09051802 54330 RESOURCE SUPPLIES	479	0	479	474.80	18.91	-14.71	103.1%
09051802 54333 SPEECH SUPPLIES	429	0	429	436.56	.00	-7.56	101.8%
10041801 51408 SPED TEACHER	306,797	0	306,797	117,998.80	188,798.20	.00	100.0%
10041802 51418 SPEECH TEACHER	79,357	0	79,357	30,521.90	48,835.10	.00	100.0%
10041803 51624 SPED EDUCATION ASST	217,561	0	217,561	97,254.56	128,461.01	-8,154.57	103.7%
10051801 54334 EDUC NEEDS TEXTS	622	0	622	673.06	.00	-51.06	108.2%
10051802 54332 EDUC NEEDS SUPPLIES	571	0	571	587.65	.00	-16.65	102.9%
10051802 54333 SPEECH SUPPLIES	429	0	429	433.15	.00	-4.15	101.0%
14041801 51416 SPED OCCUP THERAPIS	219,597	0	219,597	86,467.91	132,656.89	472.20	99.8%
14041801 51417 PHYSICAL THERAPIST	78,784	0	78,784	30,301.90	48,483.10	-1.00	100.0%
14051801 51407 HOME INSTRUCT TEACH	1,019	0	1,019	.00	.00	1,019.00	.0%
14051803 54338 SPED EDUC SUPPLIES	3,104	0	3,104	3,441.60	.00	-337.60	110.9%
TOTAL SPECIAL EDUCATION	4,297,451	0	4,297,451	1,810,724.23	2,594,619.58	-107,892.81	102.5%

51 AUTISTIC SERVICES

14045101 51436 AUTISTIC COORDINATO	72,100	0	72,100	38,674.30	33,425.70	.00	100.0%
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	ORIGINAL APPROP	TRANFRS/ ADJUSTMTS	REVISED BUDGET	YTD EXPENDED	ENC/REQ	AVAILABLE BUDGET	PCT USED
14045102 51616 TRAINER	576,416	0	576,416	227,510.76	278,183.36	70,721.88	87.7%
14055103 52463 AUTISTIC CONTRACT S	1,106	0	1,106	.00	.00	1,106.00	.0%
TOTAL AUTISTIC SERVICES	649,622	0	649,622	266,185.06	311,609.06	71,827.88	88.9%
TOTAL GENERAL FUND SCHOOL	5,484,120	-3,675	5,480,445	2,391,874.50	3,080,238.26	8,332.24	99.8%
TOTAL EXPENSES	5,484,120	-3,675	5,480,445	2,391,874.50	3,080,238.26	8,332.24	
GRAND TOTAL	5,484,120	-3,675	5,480,445	2,391,874.50	3,080,238.26	8,332.24	99.8%

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MONTHLY ENROLLMENT
ACTON PUBLIC SCHOOLS
ACTON-BOXBOROUGH REGIONAL SCHOOLS
2011-2012 ACADEMIC YEAR

Levels	Sept. 1		Oct. 1		Nov. 1		Dec. 1		Jan. 1		Feb. 1		Mar. 1		Apr. 1		May 1		Jun 1	
	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C	A	B (1) C
K	297	59 5	302	294 59 7	301	293 58 7	300	292 58 7	299	295 56 7	302	293 56 7	302	293 56 7	302	293 56 7	302	293 56 7	302	293 56 7
1	333	53 5	338	333 53 5	341	334 51 8	342	334 52 8	342	337 52 8	345	342 52 8	345	337 52 8	345	342 52 8	345	337 52 8	345	342 52 8
2	355	54 7	362	354 54 7	361	355 54 7	362	355 54 7	362	360 54 7	367	362 54 7	367	360 54 7	367	362 54 7	367	360 54 7	367	362 54 7
3	351	68 2	353	351 68 2	353	352 67 2	354	353 66 2	355	353 66 2	355	353 66 2	355	353 66 2	355	353 66 2	355	353 66 2	355	353 66 2
4	351	66 2	353	351 66 2	353	355 66 2	357	354 66 2	356	355 66 2	357	356 66 2	357	355 66 2	357	356 66 2	357	355 66 2	357	356 66 2
5	370	75 5	375	369 75 5	374	371 75 5	376	372 75 5	377	376 75 5	381	377 75 5	381	376 75 5	381	377 75 5	381	376 75 5	381	377 75 5
6	359	85 4	363	361 84 4	365	361 84 4	365	362 84 4	366	363 84 4	367	366 84 4	367	363 84 4	367	366 84 4	367	363 84 4	367	366 84 4
K-6 Ungr.	0	0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0
In D. Pre-sch.	37	8 0	37	38 8 0	38	42 8 0	42	46 8 0	46	50 9 0	50	46 9 0	50	50 9 0	50	46 9 0	50	50 9 0	50	46 9 0
O.D. Pre-sch.	2	0 0	2	2 3 0	2	3 0 2	2	3 0 2	2	2 3 0	2	2 3 0	2	2 3 0	2	2 3 0	2	2 3 0	2	2 3 0
O.D. SPED K-6	12	4 0	12	13 4 0	13	13 4 0	13	13 4 0	13	13 5 0	13	13 5 0	13	13 5 0	13	13 5 0	13	13 5 0	13	13 5 0
A.P.S. Total	2467	472 30	2497	2466 474 35	2501	2478 470 35	2513	2483 470 35	2518	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35
7	391	71 7	469	391 71 7	469	390 71 7	468	390 72 7	469	389 72 7	468	389 72 7	468	389 72 7	468	389 72 7	468	389 72 7	468	389 72 7
8	404	71 9	484	408 71 9	488	409 71 9	489	409 71 9	489	409 71 9	489	409 71 9	489	409 71 9	489	409 71 9	489	409 71 9	489	409 71 9
J.H.S. Total	795	142 16	953	799 142 16	957	799 142 16	957	799 143 16	958	798 143 16	957	798 143 16	957	798 143 16	957	798 143 16	957	798 143 16	957	798 143 16
9	394	77 8	479	395 78 8	471	388 78 8	474	388 78 7	473	385 78 7	470	385 78 7	470	385 78 7	470	385 78 7	470	385 78 7	470	385 78 7
10	414	108 3	525	415 109 3	527	415 109 3	527	416 109 3	528	416 108 3	496	416 108 3	496	416 108 3	496	416 108 3	496	416 108 3	496	416 108 3
11	387	100 7	494	387 99 7	493	386 99 7	492	386 99 7	492	385 99 7	522	385 99 7	522	385 99 7	522	385 99 7	522	385 99 7	522	385 99 7
12	362	94 9	465	361 96 7	464	362 96 7	465	362 96 7	465	362 95 7	487	362 95 7	487	362 95 7	487	362 95 7	487	362 95 7	487	362 95 7
9-12 Ungr.	0	0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0
P.G.	0	0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0	0	0 0 0
H.S. Total	1557	379 27	1963	1548 382 25	1955	1551 382 25	1958	1552 382 24	1958	1548 380 24	1975	1548 380 24	1975	1548 380 24	1975	1548 380 24	1975	1548 380 24	1975	1548 380 24
Total JHS & HS	2352	521 43	2916	2347 524 41	2912	2350 524 41	2915	2351 525 40	2916	2346 523 40	2909	2346 523 40	2909	2346 523 40	2909	2346 523 40	2909	2346 523 40	2909	2346 523 40
O.D. SPED 7-12	44	13 0	57	44 12 0	56	43 12 0	55	43 12 0	55	43 13 0	56	43 13 0	56	43 13 0	56	43 13 0	56	43 13 0	56	43 13 0
Reg. Total	2396	534 43	2973	2391 536 41	2968	2393 536 41	2970	2394 537 40	2971	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40
A.P.S. Total	2467	472 30	2497	2466 474 35	2501	2478 470 35	2513	2483 470 35	2518	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35	2539	2504 474 35
Reg. Total	2396	534 43	2973	2391 536 41	2968	2393 536 41	2970	2394 537 40	2971	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40	2965	2389 536 40
Grand Total	4863	534 73	5470	4857 536 76	5469	4871 536 76	5483	4877 537 75	5489	4893 536 75	5504	4893 536 75	5504	4893 536 75	5504	4893 536 75	5504	4893 536 75	5504	4893 536 75

All Principals (2)

C. Bates

D. Aicardi

S. Mills

Distribution:

In D. = In District

Pre-School = SPED

A = ACTON

B = BOXBOROUGH

C = Choice/Staff/Tuition In

A. Bisewicz

M. Altieri

D. Bookis

In D. = In District

P.G. = Post Graduates

Ungr. = Ungraded

O.D. = SPED Out of District

O.D. = SPED Out of District

K. Nelson

D. Bookis

L. Huber

In D. = In District

P.G. = Post Graduates

Ungr. = Ungraded

O.D. = SPED Out of District

O.D. = SPED Out of District

E. Weiner

L. Huber

L. Huber

In D. = In District

P.G. = Post Graduates

Ungr. = Ungraded

O.D. = SPED Out of District

O.D. = SPED Out of District

Students other than Choice counted under column C:

Staff Students -

Tuition in Students -

Sped Tuition in Students

Acton-Boxborough Food Services



Serving Education Daily

**Acton Public Schools
Acton-Boxborough Regional School District
Food Service Department
16 Charter Road
Acton, MA 01720-2995
Phone # 1-978-264-4700x3221
Fax # 1-978-264-3340
Kirsten Nelson, Director**

To: Stephen Mills
From: Kirsten Nelson
Date: January 12, 2012
RE: FY'11 Food Service Department Reports for APS School Committee packet

Enclosed please find reports for the 2010-2011 school year.

- Cash report and balance
- Profit & loss statement
- Acton Public Schools July 10-June 11 Spreadsheet
- Three year comparison of Type A reimbursable meals served
- Classification of revenue
- Comparison of reimbursable meals and a la carte sales
- Total revenue

Acton Public Schools
Food Service Dept.
FY'11 Fund Report

Sales to Children				\$423,639.40
Sales to Adults				\$17,952.59
State and Federal Reimbursements Received				\$69,876.97
Total Receipts				\$511,468.96
Minus Total Expenditures				\$520,929.71
Increase or (Decrease)				(\$9,460.75)
Closing Fund balance June 30, 2010				\$87,426.99
Closing Fund Balance June 30, 2011				\$77,966.24

	A	B	C	D	E	F	G	H
1								
2								
3								
4								
5								
6								
7	INCOME:							
8								
9	1. Sales			\$434,515.21				
10	2.*Reimbursement earned			\$74,337.14				
11	3. Other income			\$7,076.78				
12								
13	TOTAL INCOME				\$515,929.13			
14								
15	EXPENSES:							
16	Cost of food used							
17	1.**Beginning inventory			\$5,252.56				
18	2.Plus purchases			\$157,088.20				
19	3.Total food available			\$162,340.76				
20	4.**Minus ending inventory			\$6,789.25				
21								
22	TOTAL COST OF FOOD USED				\$155,551.51			
23								
24	Cost of supplies used							
25	1.**Beginning inventory			\$3,375.31				
26	2.Plus purchases			\$17,341.97				
27	3.Total supplies available			\$20,717.28				
28	4.Minus ending inventory			\$4,065.94				
29								
30	TOTAL COST OF SUPPLIES USED				\$16,651.34			
31								
32	1.COST OF LABOR				\$270,574.06			
33	2.FRINGE BENEFITS				\$41,338.60			
34	3.OTHER EXPENSES				\$34,586.88			
35								
36	4.TOTAL EXPENSES				\$518,702.39			
37								
38	PROFIT OR (LOSS) FOR THE YEAR				(\$2,773.26)			
39								
40	*Reimbursement earned during the year but not completely received by June 30,2011							
41	**Inventories do not include the value of USDA Commodity foods.							
42	It only includes the amount paid for those commodities.							
43								
44								

Action Public Schools
Food Service Department
FY '11

July 10-June 11

	A	B	C	D	E	F	G	H	I	J	K	L	M
1													
2													
3													Bag Bal
4													\$87,426.99
5		REV	Reim Rcvd	Tot cash AV	Cst /Food	Cst/Supp	Labor	Fringe	Equipment	Other	Total Exp	NetP/L	
6	July '10	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$2,389.11	\$7,171.00	\$0.00	\$0.00	\$9,560.11	(\$9,560.11)	\$77,866.88
7	August	\$5,594.93	\$1,498.36	\$7,093.29	\$0.00	\$0.00	\$2,660.81	\$0.00	\$0.00	\$0.00	\$2,660.81	\$4,432.48	\$82,299.36
8	September	\$74,119.75	\$449.68	\$74,569.43	\$8,038.46	\$1,713.25	\$20,452.57	\$3,796.40	\$784.75	\$386.06	\$35,171.49	\$39,397.94	\$121,697.30
9	October	\$42,121.62	\$7,726.25	\$49,847.87	\$16,966.64	\$1,683.12	\$28,063.13	\$3,796.40	\$0.00	\$344.47	\$50,853.76	(\$1,005.89)	\$120,691.41
10	November	\$42,977.37	\$8,006.34	\$50,983.71	\$24,149.11	\$2,689.19	\$37,866.86	\$5,694.60	\$1,888.71	\$491.59	\$72,780.06	(\$21,796.35)	\$98,895.06
11	December	\$37,248.06	\$7,598.68	\$44,846.74	\$15,359.12	\$1,459.91	\$28,637.42	\$3,796.40	\$0.00	\$748.03	\$50,000.88	(\$5,154.14)	\$93,740.92
12	January	\$49,483.33	\$7,152.96	\$56,636.29	\$16,586.83	\$2,166.74	\$23,376.22	\$3,796.40	\$98.00	\$587.82	\$46,612.01	\$10,024.28	\$103,765.20
13	February	\$29,699.79	\$7,110.47	\$36,810.26	\$13,181.72	\$1,680.51	\$26,254.37	\$3,796.40	\$21,727.60	\$1,345.28	\$67,985.88	(\$31,175.62)	\$72,589.58
14	March	\$50,918.79	\$5,148.48	\$56,067.27	\$12,180.58	\$1,522.39	\$22,018.43	\$3,796.40	\$845.19	\$238.04	\$40,601.03	\$15,466.24	\$88,055.82
15	April	\$41,076.14	\$9,487.77	\$50,563.91	\$16,321.55	\$1,526.70	\$27,300.55	\$3,796.40	\$831.50	\$279.12	\$50,055.82	\$508.09	\$88,563.91
16	May	\$44,069.15	\$6,937.60	\$51,006.75	\$20,948.23	\$1,818.10	\$36,576.02	\$2,596.96	\$946.97	\$811.34	\$63,697.62	(\$12,690.87)	\$75,873.04
17	June '11	\$24,283.06	\$8,760.38	\$33,043.44	\$13,355.96	\$1,082.06	\$14,978.57	(\$698.76)	\$1,794.45	\$437.96	\$30,950.24	\$2,093.20	\$77,966.24
18													
19		\$441,591.99	\$69,876.97	\$511,468.96	\$157,088.20	\$17,341.97	\$270,574.06	\$41,338.60	\$28,917.17	\$5,669.71	\$520,929.71	(\$9,460.75)	
20													
21													
22	*Revenue includes student lunches, adult lunches and ala carte Sales												
23													
24	*Reimbursement monies received not earned												
25													
26	*Expenses include cost of food , cost of supplies, Labor, Fringe(Health) Benefits, Other (Maintenance of equipment, equipment purchase, phone,												
27	small wares												
28													
29													

Acton Public Schools
Food Service Dept.
3 year comparison of Type A Meals Served
FY11

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6						
7		2008-2009	2009-2010	2010-2011	Dif. 10-11	Dif. 10-11
8					From 09-10	From 08-09
9						
10	Enrollment	2,560	2,619	2,563	-56	3
11	July					
12	August			1,045	1,045	1,045
13	September	19,629	19,319	18,393	-926	-1,236
14	October	20,796	20,519	19,205	-1,314	-1,591
15	November	17,842	14,393	18,200	3,807	358
16	December	16,794	18,828	17,157	-1,671	363
17	January	17,894	20,107	16,828	-3,279	-1,066
18	February	16,749	14,368	13,196	-1,172	-3,553
19	March	23,201	25,620	22,699	-2,921	-502
20	April	16,248	16,358	16,355	-3	107
21	May	21,573	21,751	21,809	58	236
22	June	20,266	13,758	14,362	604	-5,904
23						
24	Total	190,992	185,021	179,249	-5,772	-11,743
25						
26	Percent Change Meals Served		-3.13%	-3.12%		
27			(price increase)			
28	Percent Change Enrollment		2.30%	-2.14%		

Acton Public Schools
School Lunch Program
Revenue-Reimbursement Report
2010-2011

	Lunch		Vending		Total Revenue
July	\$0.00		\$0.00		\$0.00
August	\$5,594.93		\$0.00		\$5,594.93
September	\$74,064.75		\$55.00		\$74,119.75
October	\$42,038.62		\$83.00		\$42,121.62
November	\$42,912.37		\$65.00		\$42,977.37
December	\$37,168.06		\$80.00		\$37,248.06
January	\$49,416.33		\$67.00		\$49,483.33
February	\$29,609.29		\$90.50		\$29,699.79
March	\$50,753.79		\$165.00		\$50,918.79
April	\$41,036.14		\$40.00		\$41,076.14
May	\$43,954.15		\$115.00		\$44,069.15
June	\$23,983.06		\$300.00		\$24,283.06
Totals	\$440,531.49		\$1,060.50		\$441,591.99
Reimbursements		State	Federal 11	Federal 4	Total Reimb.
Received					
July		\$0.00	\$0.00	\$0.00	\$0.00
August		\$1,498.36	\$0.00	\$0.00	\$1,498.36
September		\$54.86	\$123.12	\$271.70	\$449.68
October		\$965.63	\$2,194.94	\$4,565.68	\$7,726.25
November		\$1,008.26	\$2,210.78	\$4,787.30	\$8,006.34
December		\$955.50	\$2,124.62	\$4,518.56	\$7,598.68
January		\$900.74	\$1,955.16	\$4,297.06	\$7,152.96
February		\$883.47	\$1,851.72	\$4,375.28	\$7,110.47
March		\$692.79	\$1,478.98	\$2,976.71	\$5,148.48
April		\$1,191.70	\$2,639.18	\$5,656.89	\$9,487.77
May		\$858.64	\$1,826.66	\$4,252.30	\$6,937.60
June		\$1,144.97	\$2,370.40	\$5,245.01	\$8,760.38
					\$0.00
Totals		\$10,154.92	\$18,775.56	\$40,946.49	\$69,876.97
Total Revenue		\$441,591.99			
State Total		\$10,154.92			
Federal Total		\$59,722.05			
Grand Total		\$511,468.96			

Acton Public Schools
Food Service Department
Comparison of FY' 10 and FY'11 Student Revenue, Type A Meals and A La Carte Sales

	FY10	FY11	Type A Meal	FY 10	FY 11	Type A	FY 10	FY 11	ALA Carte	Total
	Type A Meal	Type A Meal	Percent	Type A	Type A	Revenue	A La Carte	A La Carte	Revenue	Revenue
	Served	Served	Change	Revenue	Revenue	Percent	& Vending	& Vending	Percent	Percent
						Change	Revenue	Revenue	Change	Change
July										
August	0	1,045	#DIV/0!	\$0.00	\$4,802.35	#DIV/0!	\$0.00	\$167.50	#DIV/0!	#DIV/0!
September	19,319	18,393	-4.8%	\$75,867.70	\$68,467.95	-9.8%	\$5,120.25	\$4,503.00	-12.1%	-9.9%
October	20,519	19,205	-6.4%	\$37,692.45	\$37,689.45	0.0%	\$3,502.75	\$3,332.75	-4.9%	-0.4%
November	14,393	18,200	26.5%	\$33,807.55	\$38,369.45	13.5%	\$2,596.25	\$3,094.75	19.2%	13.9%
December	18,828	17,157	-8.9%	\$35,454.30	\$33,217.25	-6.3%	\$3,023.25	\$2,727.00	-9.8%	-6.6%
January	20,107	16,828	-16.3%	\$49,585.75	\$44,504.64	-10.2%	\$3,471.25	\$3,000.25	-13.6%	-10.5%
February	14,368	13,196	-8.2%	\$29,956.55	\$25,861.41	-13.7%	\$2,599.25	\$2,205.45	-15.2%	-13.8%
March	25,620	22,699	-11.4%	\$54,555.80	\$45,197.25	-17.2%	\$4,322.55	\$4,073.00	-5.8%	-16.3%
April	16,358	16,355	0.0%	\$30,444.10	\$35,528.50	16.7%	\$2,604.25	\$2,800.00	7.5%	16.0%
May	21,751	21,809	0.3%	\$38,474.10	\$38,619.55	0.4%	\$3,649.00	\$277.25	-92.4%	-7.7%
June	13,758	14,362	4.4%	\$15,617.60	\$18,732.15	19.9%	\$3,009.25	\$2,973.50	-1.2%	16.5%
Total	185,021	179,249	-3.1%	\$401,455.90	\$390,989.95	-2.6%	\$33,898.05	\$29,154.45	-14.0%	-3.5%

8 of 8

[illegible]

Town of Acton MinuteVan Rail Shuttle Has New Rates and More Parking for 2012.


More options available for commuters.

Acton, MA, January 3, 2012 – The Town of Acton's MinuteVan Rail Shuttle is kicking-off 2012 with new rates and more parking options for commuters. The Rail Shuttle runs from off-site parking to the MBTA Commuter Rail Station in South Acton. For the past year the shuttle has been operating during peak commuting hours from the Municipal lot behind the West Acton Fire Station where there are 22 spaces available for commuters. Beginning on January 3, 2012 the Town will open a second off-site parking location in partnership with the Mount Calvary Church (472 Massachusetts Avenue). The Commuter Lot at the Mount Calvary Church is marked with signs and has 21 available spots. The updated 2012 schedule is available at www.minutevan.net. Please check the times in case you have an older paper brochure.

The Town has set the 2012 rate for an annual parking sticker/bus pass combination at \$250 for all commuters including both Acton residents and non-residents (non-resident rate was previously \$500). The rate for a monthly parking spot including shuttle access has been reduced from \$50/month to \$40/month. Day passes that include parking and the shuttle remain at \$3/day. Non-residents now also have the same option as residents to purchase a bus pass only (no parking included) for an annual rate of \$200. Day riders will continue to pay \$1 per trip (10-ride ticket books available) for a ride only with no parking. Annual passes can be ordered on-line at www.minutevan.net and monthly and daily passes are available directly from the driver. The Rail Shuttle is funded in part with a grant from the Boston Metropolitan Planning Organization and the Massachusetts Department of Transportation.


In addition to the Rail Shuttle the Town continues to operate the MinuteVan Dial-A-Ride service. The Dial-A-Ride operates anywhere within a 3.5 mile radius of Town Hall between 8:00 AM and 11:00 AM and again between 3:00 PM and 8:00 PM. Riders under the age of 12 must ride with an adult and riders aged 12-18 can ride alone with a parent/guardian's permission. Passengers must book trips with 24-hours notice by calling the dispatcher at 978-844-6809 or booking on-line at www.minutevan.net. The service has become tremendously popular and fills up on a regular basis so riders are encouraged to book trips as early as possible. The cost for trips within Acton is \$2/trip and out-of-town trips are \$4/trip.

For schedules rate and all program information, go to www.minutevan.net. Acton's Transportation Advisory Committee (tac@acton-ma.gov) is always interested in hearing how the MinuteVan services are working for you and if you have any suggestions for improvements.

From:  "Allen Nitschelm" <allen@thehomesteader.com> Fri, Dec 16, 2011 7:10:41 PM  

Subject: Fantasy numbers?

To:  jpetersen@mail.ab.mec.edu

Cc:  APS School Committee  <fincom@acton-ma.gov>

Attachments:  Attach0.html 3K

Dear John,

At Thursday's School Committee meeting, you stated that others should stop using "fantasy" numbers when describing reserve use. You said that the town did not "use" \$2 million of reserves in FY11. If one budgets \$2 million from reserves and returns \$2 million to reserves at the end of the year, then one hasn't "used" any money.

Looking at past use, you are correct. But from a budgetary point of view looking forward, you completely miss the point.

By using (say) \$2 million of reserves in FY13, you allow the operating entities to spend that money on operations. Should replenishment be less than \$2 million, you have an operating deficit and are thus "spending beyond your means."



Unless you believe that replenishment of reserves next year, **and every year thereafter**, is going to be \$2 million, then you are deficit spending, plain and simple (even if, in one year, reserves are fully replenished.)

The Finance Committee has stated at ALG that spending needs to slow down. By reducing proposed reserve use to \$1 million, as FinCom has recommended, one would reduce what the operating entities can budget for operating costs. This means lower budgets, lower spending and better financial management in future years.

The amount of reserve replenishment in FY11 is thus irrelevant to future budgets, other than to note that ending reserve balances were higher than expected.

Cordially yours,

Allen Nitschelm
Acton Forum

From: [REDACTED] "Allen Nitschelm" <allen@thehomesteader.com> Wed, Jan 11, 2012 1:02:58 ... 
Subject: New AF article
To: [REDACTED] <ALG@acton-ma.gov>
Cc: [REDACTED] <fincom@acton-ma.gov> [REDACTED] <bos@acton-ma.gov>  APS School Committee
Attachments: [REDACTED] Attach0.html 2K

Hi ALG members,

I was going to write you an email about an issue that was raised on budget Saturday, but my email turned into an article on Acton Forum instead. It is about how we need to address hiring new police officers. It specifically concerns the ALG.

<http://www.actonforum.com/blogs/allenn/how-increase-police-staffing-bad-economy>

Thanks,

Allen Nitschelm
Acton Forum

HOW TO INCREASE POLICE STAFFING IN THIS BAD ECONOMY

I attended part of the Saturday budget session held jointly by the Board of Selectmen and the Finance Committee on Jan. 7, 2012. I went to listen to Acton's FinCom talk about our OPEB obligation, but also heard about the new Senior Center proposal and Police Chief Frank Widmayer talk about police staffing.

Widmayer said that since around 1990, he has voiced concerns about inadequate police staffing and asked for an increase in patrol officers, yet not much progress has been made.

Widmayer said state and federal funding has decreased dramatically for things like community policing, and the recent economic crisis has led to an increase in certain crimes like domestic violence and robberies. When there is some natural disaster or local emergency, it is tough to respond properly with the size police force Acton has. In short, we need more officers.

An interesting conversation ensued. FinCom member Dong Tindal made an observation that he's attended several of these annual budget events and each time he hears the same thing: We need more police officers and we are understaffed. Tindal wondered why the town boards, who are not experts in police staffing, would listen to this year after year and take virtually no action to correct it. Do we know something that our police professionals do not? And why are we substituting our judgment for theirs on a matter of public safety?

Maybe we don't believe our own experts? So Tindal suggested we hire an outside expert to give us a recommendation, but Widmayer said we already did that in 1999. It seems the evidence and experts are on the same page.

There is a way to increase police staffing without raising taxes, and that is to bring back some balance to our "revenue split" between the town and schools. Acton has a budget of around \$80 million per year, with about two-thirds of that dedicated to school expenses. That means the rest of local town government is being funded by only one-third of our total revenues. This includes all of town hall, plus police, fire, and highway. There are very few cities and towns in Massachusetts that have a higher percentage of their budget going to their schools.

One of the Acton Leadership Group's (ALG) original charges was to decide the "split" between town and school. As Acton has developed, the schools have gobbled up more and more of the pie. Perhaps it is time to review the split.

With increasing school enrollment over the past years, this may have been a necessary development. But it may also be unsustainable forever. Can we continue to starve our public safety services for over 20 years?

A one-percent (1%) swing back to the town would allow the police department to hire approximately eight officers that the Police Chief says we need. This one-percent swing would result in \$800,000 more for the town and \$800,000 less for the schools.

One of my major concerns in town is controlling labor costs. The town has taken steps to try to limit the growth of salaries and benefits, while the schools have seemed almost unconcerned about the major long-term commitments they are making. They recently increased compensation for teachers roughly 5% a year for three years.

As the schools continue to spend our money, we are now possibly risking public safety. But it isn't fair to ask taxpayers to pay more. Instead, we need to bring back some balance to our revenue split and stop giving the schools a blank check on which they can write the latest teacher raise.

And if the schools insist on giving raises, it should not be funded by increased taxes or cannibalizing more from the town side of the budget. If they want to give out raises, they need to find reductions elsewhere in their budget. They have failed that standard in their latest contract negotiation and the municipal side and taxpayers should not have to continue to pay for that failure.