Efficiency and Regionalization Grant Report

August 2019

The Selectboards of Bernardston and Leyden arranged a joint meeting of the four towns comprising the Pioneer Valley Regional School District (PVRSD), (Bernardston, Leyden, Northfield and Warwick) and invited the PVRSD School Committee, the respective Finance Committees, and the PVRSD superintendent to discuss the School Budget deficit, the prospects of updating the Regional Agreement which was last amended in 1991, and the need to identify and implement initiatives that results in a more affordable and manageable School District budget over time.

It was agreed that the best way to accomplish the above was to appoint a committee, which later became known as the HEART Committee (Honest Education and Retaining Trust), with its primary purpose focused on exploring potential options and making recommendations that would promote a more viable and sustainable School District budget going forward. Three representatives were appointed from each town along with three School Committee members while the superintendent served as an ad hoc member (Addendum A).

Members of the HEART Committee appointed a chair, established its name and agreed a facilitator would be beneficial to its work. To this end, the towns of Leyden and Bernardston applied for funding through the Franklin Regional Council of Governments (FRCOG) for facilitation services. Funding for a facilitator in the amount of $6,000 was secured and Community Action of Franklin Hampshire County was chosen to facilitate.

With the assistance of the facilitator a mission, vision, and purpose were developed and the name of the committee was formally established as HEART, as noted above. Additionally, the Committee explored other district’s initiatives in implementing cost saving measures, researched/discussed efficiencies and economy of scale collaboration and supported further research pursuant to the benefits of expanding the existing regional school district or the formation of a new one (Addendum B).
That research revealed that other districts received grants through the Division of Local Services, specifically the Efficiency and Regionalization (E&R) Grant Program. The Towns of Warwick and Northfield applied for the E&R Grant Program and secured $25,000 on behalf of the HEART Committee.

An RFQ was developed by the Northfield on behalf of the HEART Committee and all proposals received were rejected per Mass General Law 30 B section 9. This was followed by a Sole Source Procurement (Addendum C) and The Abrahams Group was awarded a consultation Agreement on June 21, 2018. (Addendum D).

Mark Abrahams, Stephen Hemman, and Mac Reid provided the deliverables contained in the Sole Source Justification Agreement. A Financial Baseline Analysis was conducted to determine the present and future costs of the Pioneer Valley Regional School District (PVRSD) and public presentations were provided for the communities and the School Committee (Addendum E-1, E-2; F).

Additionally, the HEART Committee sponsored a meeting for all rural school districts with a focus on re-envisioning sustainable rural schools in the Commonwealth. A summary of suggestions and ideas are included in Addendum F-1.

A series of Working Meetings were held with the HEART Committee and the consultants to update the Regional Agreement (RA), deleting obsolete or restrict language, adding language to conform with state regulations, and addressing issues, such as the closure of school(s) (Addendum G-1, G-2; H). The Consultants developed a School Choice Survey with the Superintendent responsible for its dissemination (Addendum I-1 & I-2). The results of the survey can be found in Addendum J-1; J-2.

The HEART Committee recommended amendments to the RA and voted to forward those recommendations in the form of a final amended Regional Agreement document to the School Committee for their review and vote and in turn would be forwarded to the towns for voter approval at their respect Town Meetings (Addendum K; L-1; L-2).

Additionally, upon reviewing the data, the consultants suggested potential strategies for the School Committee to consider in realizing more efficiencies in its operation and the merits of researching the potential benefits of regionalizing with another school district, sharing administrative services and utilizing technology
and the sharing of staff in forming collaborative endeavors to provide other educational opportunities for students.

Although the original task of the HEART committee has been concluded, there remains much work to be done to make the district affordable and sustainable for the towns and the District. A summary of deliverables by The Abrahams Group pertaining to the work of the HEART Committee’s focus on the Regional Agreement is noted in Addendum M.

As an aside, it should be noted that the towns of Gill and Montague applied for an E&R grant and included the PVRSD, after a vote of the PVRSC to support the exploration of further regionalization and sharing services. Although the scope of this research was beyond the realm of the HEART Committee, there remains strong interest of some members that this possibility be thoroughly investigated and if deemed beneficial, pursued with the towns and state.

Additionally, the four towns of PVRSD voted at their Annual or Special Town Meetings to create a regional school district planning committee in accordance with MGL Chapter 71, section 14 for the possibility of merging the school district into one larger district comprising multiple towns.

Appendix 1 provides a list of approved invoices relating to the scope of work executed in fulfilling the deliverables outlined in the grant.

Please note the final amount expended is $___________. Appendix 2.
Town of Bernardston  
Board of Selectmen

MEETING MINUTES: for the meeting of February 1, 2017.

Select Board Members Present:  
Andrew Girard, Chairman  
Robert R. Raymond  
Stanley Garland

Others Present:  
(see attached)

Chairman Andrew Girard called the meeting to order at 6:02 pm.

Andrew announced the meeting is being broadcast by BNCTV.

Warrants (week ending January 27th)
Andrew asked for a motion to approve the Payroll Warrant in the amount of $32,277.58. 
Motion by Bob, second by Stan. Motion carried.

Andrew requested a motion to approve the Vendor Warrant in the amount of $68,376.91. 
Motion by Bob, second by Stan. Motion carried.

Minutes
  • Regular Meeting, January 18, 2017. Motion by Bob to approve as written, second by Stan. Motion carried.
  • Special Meeting, January 25, 2017. Motion by Bob to approve as written, second by Stan. Motion carried.
  • Executive Session, January 26, 2017. Motion by Bob to approve as written, second by Stan. Motion carried.

Calendar & Announcements
Bob read aloud the events and activities in Town for the near future.

Citizen’s Concerns – None

Appointments – None
New Business

Master Plan Implementation Committee
Seven (7) names have been forwarded for consideration to serve on the Master Plan Implementation Committee: Wendy Abramson (Agricultural Commission), Bill Hill (Conservation Commission), Chris Wysk (Planning Board), Jane Dutcher (Finance Committee), Will Pratt (Board of Health), John Lepore (Master Plan Steering Committee) and Celt Grant (citizen.). It is suggested the MPIC members serve 3-year terms and the committee size be no more than 9 to allow for 2 additional members to be appointed at-large. Bob motioned to appoint the names announced by Andrew to the Master Plan Implementation Committee each with a 3-year term and the MPIC have a membership of no more than 9, second by Stan. Motion carried.

PVRSD HEART Committee
Andrew summarized the meeting held on January 25th, where PVRSD member town representatives in attendance agreed to appoint an additional member to the HEART Committee for a total of 3 from each member PVRSD town. Stan said he would like to see a member from the community that has no association with the school system to promote objectivity. Bob said the FY18 budget is expected to be less than FY17 due to declining enrollment and reduction in staff. How that translates into a FY18 assessment for Bernardston remains to be seen. The Board decided to make an appointment at the next meeting February 15th after receiving inquiries from the public to serve. Bob said Joseph Arsenault who was not appointed originally in favor of Jack Killeen and Robert Keir could be a choice if there was no interest otherwise.

Hillside Pizza Liquor License Application
Hillside Pizza has applied for Beer & Malt restaurant license and is seeking approval from the local licensing authority, the Board of Selectmen. There are no issues with license quotas for this type of license in Bernardston. Stan motioned to approve the application, second by Bob. Motion carried and an ABCC Form 43 was signed by all 3 Board members. The application will now be sent to the ABCC for further vetting and approval. This could take some time.

Drug Kiosk
Police Chief James Palmeri reported to the Board the success of a no questions asked policy of receiving an unwanted prescription medicine program via a drop box at the Police Station. A total of 36lbs of has been collected to date. The Chief’s correspondence is attached herein as part of the minutes.
Notice of Tax Title Taking
The Treasurer passed on notice of a recent tax title taking of 4 acres of open land at an address of 879 Huckle Hill Rd. The taking was executed as of January 18th. The Town is required to wait 12-months before considering a public auction.

Trash Compactor Bin
Gary Wetherby reports a trash compactor bin requires repair due to corrosion of the rails. The unit has been taken out of service by the FCSWMD due to its condition. Repair of the bin would be approx. $2,500. A new bin is $7,000. While the bin is under repair, the Town can rent a bin from the hauler at $50 per month. Motion by Bob to authorize repair of the bin from the recycling revolving fund, second by Stan. Motion carried.

BES Use
The Franklin County Cheerleader Association is seeking approval of the Board to use the BES cafeteria Wednesdays from February 8th to Spring 2017 on a weekly basis. Bob Clancy, BES Principal, has signed off on the request. So moved by Stan, second by Bob. Motion carried.

Board of Health Clerk
Stan asked for clarification of the BOH Clerk line item as it appeared it was running out of money. Bob said there was an alternate method of paying the Clerk position but could recall the mechanics of the funding. The Town Coordinator will check with the Town Accountant.

Old Business
Town Hall Furnace
G&L Energy Services provided a certification of completion for the Town Hall furnace replacement project to the Selectmen for signature. A walk around inspection was conducted by G&L and Sandri Energy on January 18th. A final invoice of $29,760.00 was processed this warrant cycle. Motion to sign the certificate of completion by Stan, second by Bob. Motion carried.

Voting Machine
Town Clerk Paul Luther plans to borrow a new voting machine for the May 1st election without obligation to purchase the same as he discussed with the Selectmen on January 18th. Paul will reconsider if there is an objection by the Board. There is no objection.
Comcast
The meeting with Comcast has been moved to March 15th and has been formally recognized by Comcast. This meeting is in regards to a service issue with a resident on Huckle Hill Rd.

Town Coordinator Report
Hugh Campbell reported on the following:

Selectmen’s Annual Report 2016
A list of topics was handed out for the Board to consider for the 2016 Annual Report. The Board also accepted the proposed cover photo of the stone arch railroad bridge over Fall River with an Amtrak train crossing the same.

Town Hall floors
Jeff Gale inspected the Town Hall floors recently and will provide a quote to plug the holes in the floors where the old radiators were removed.

Cushman Library
Dead River has scheduled installation of a new oil tank at Cushman Library February 9th.

Adjournment
With no further business to be discussed, Stan made a motion to declare the meeting adjourned at 6:43pm, Bob seconded. Motion carried.

Attest: Hugh Campbell, Town Coordinator

________________________, Chairman
Andrew I. Girard  Stanley D. Garland  Robert R. Raymond

Executive Session
Andrew stated the Board will be convening Executive Session. He asked for a motion to go to into Executive Session pursuant to MGL Chapter 30A Section 21 (6.) Stan motioned to do so, second by Bob. Andrew asked for a roll call vote: Stan aye, Bob aye, Andrew aye. Andrew announced the Board will not be reconvening into Open Session upon conclusion.
HEART Committee Background

The Honest Education and Retaining Trust Committee, the HEART Committee, formed in February of 2017 after the Bernardston board of selectmen called a meeting of concerned citizens, educators, and town government members on January 25, 2017. At the time, selectmen suggested that the District Agreement that frames how the towns in the Pioneer district collaborate to education our children might need to be revised to meet the district’s current challenges. With declining enrollment and increased costs, continuing to finance the excellent education system we’ve built and collaborated on, guided by our District Agreement, has become increasingly difficult. The HEART committee came together in the hope that with a diverse membership of educators, town officials, and concerned citizens, we could come up with some ideas and solutions including but not limited to recommended revisions to the District Agreement.

The committee has met bi-monthly since February of 2017 and is guided by the following statement of purpose:

The HEART Committee (Honest Education and Retaining Trust) serves as a bridge between the towns (Bernardston, Leyden, Northfield and Warwick) and the Pioneer Valley Regional School District with its primary purpose of recommending and advocating for changes that promote high quality educational services for all students in a manner that is sustainable and affordable. These recommendations and changes may include, but are not limited to, the provisions of the District Agreement.

The HEART Committee is committed to reaching out and communicating with various stakeholders within the respective towns and working collaboratively to support, not supplant, the work of existing entities (i.e. School Committee, Boards of Selectmen, etc.) and to openly explore creative options, including those that address efficiencies and economies of scale for member towns and the regional school district.

Finally, the HEART Committee anticipates serving in an advocacy role that supports regional and state-wide efforts to increase revenues and manage the escalating expenses associated with operating a high performing school district.

Community Best Practices Grant Planning:

- Over time the HEART committee has identified the need for data to inform future district-wide decisions related to reducing expenses and minimizing cost increases while maintaining quality. As a citizen- based, volunteer committee, we also acknowledge the lack of time and expertise that committee members themselves can bring to this work.
TOWN OF NORTHFIELD

www.northfieldma.gov
69 MAIN STREET NORTHFIELD, MASSACHUSETTS 01360-1017
Willie Morales MPP Town Administrator
admin@northfieldma.gov
413.498.2901 x115

August 22nd 2017

Director of Special Initiatives Division of Local Services Department of Revenue
PO Box 9569 Boston, MA 02114

RE Northfield Voted Community Compact Scope of Work

Dear Mr Powers,

The Northfield Board of Selectmen voted the scope for the scope of work herein attached below:

Northfield Warwick Community Compact Statement of Work Project Managers:
Tracy Rogers and Sue O'Reilly McRae Sponsor: MA Dept of Local Services (DLS)

Revision History Revision date Revised by 7/23/17
Tracy Rogers

Description of change reduced amount of meeting facilitation support Removed Clean Sites and Plant Trees projects

Purpose

Northfield and Warwick, with assistance from the MA Dept of Local Services, wants to implement the local government best practices of Regionalization/Shared Services
Scope  Regionalization/Shared Services (Support HEART Committee)

All project tasks

Who is responsible

Due date

Task description

1. Issue bid for data analysis services
   Town of Northfield
   8/31/17

2. Review data and choose firm
   HEART Committee
   9/15/17

3. Execute contract with data analysis firm
   Town of Northfield.
   9/22/17

Town of Northfield
9/30/17

5.

4. Contract with The Mediation and Training Collaborative to continue to provide facilitation services with remaining grant funds
   Work with data analysis firm to collect and analyze data and produce a written

6. Recommendations presented to the
   School Committee
7. Hold public

HEART Committee
1/31/18

HEART Committee
2/28/18
HEART Committee
4/30/18

Out of scope activities that are critical to the success of the project
1. The School Committee agrees to adopt some or all of the Committee's recommendations.

Deliverables
Research completed on ways to provide quality education at a more sustainable cost for its member towns. Feedback collected from residents of member towns. A list of recommendations written by a data analysis firm guided by the HEART Committee presented to the Pioneer Valley Regional School Committee. The recommendations vetted by the School Committee are presented to the four member towns for annual town meeting votes if necessary.

Cost Estimates
Cost Type
Amount

Labor hours

External costs
Labor (consultants, contract labor) Data Analysis Labor (consultants, contract labor)
- Meeting Facilitation Supplies Advertising
approx $20,000 approx $5,000

Schedule Overview

Estimated Project Completion Date: 4/30/2018 Impact of Late Delivery:
The four towns will have to wait until annual town meeting in 2019 to vote to approve the Committee's recommendations.

Measures of Success
The project will be judged complete and successful when:

1. Recommendations are presented to the School Committee.
2. Changes needing a vote of member towns are placed on annual town meeting warrants.

TOWN OF NORTHFIELD

www.northfieldma.gov

69 MAIN STREET NORTHFIELD MASSACHUSETTS 01360 1017

Willie Morales M.P P Town Administrator

admin@northfieldma.gov
413 498 2901 x115

Major Responsibility or Contribution
Work with data analysis firm to research education best practices and make recommendations to the School Committee.

Provide funding and technical assistance

Stakeholder Analysis

Name & Role
HEART Committee Customer MA Dept. of Local Services Sponsor Willie Morales
Northfield town administrator Management

Manage contracts and expenses

Assumptions

Assumption: The School Committee is open to recommendations. Impact if assumption is incorrect: The recommendations may not make it past the School Committee to its member towns or will make it to the towns' annual town meetings but will lack the support necessary to pass.

Assumption: The Committee can hire a data analysis firm for approximately $20,000 to provide it with enough data analysis support that recommendations can be made to the School Committee. Impact if assumption is incorrect: The Committee will have to decide if it...
wants to redistribute the grant funds and/or ask the four District towns to commit funds to support the project.

Best Regards,

Willie Morales, M.P.P Town Administrator
Consultation Agreement Between the Town of Northfield and The Abrahams Group

THIS AGREEMENT made as of the 21st day of June, 2018, is by and between the Town of Northfield, hereinafter called the TOWN, and The Abrahams Group, hereinafter called the CONSULTANT.

WHEREAS, the TOWN has entered into an Agreement The Abrahams Group to conduct an Efficiency and Regionalization Study of the Pioneer Valley Regional School District to develop plans for increased operational efficiencies and potential regionalization among the Gill Montague and Franklin County Tech districts and

WHEREAS, professional services relating to the implementation of the project are sought to assist the TOWN in the timely achievement of the project objectives.

NOW, THEREFORE THE PARTIES HERETO DO AGREE AS FOLLOWS:

1. ENGAGEMENT OF CONSULTANT: The TOWN hereby engages the CONSULTANT to perform the services set forth herein and the CONSULTANT hereby accepts the engagement.

2. SCOPE OF SERVICES: The CONSULTANT shall perform the necessary services as described in the attached Scope of Work.

3. RESPONSIBILITY OF THE TOWN: The TOWN shall assume responsibility for assisting the CONSULTANT insofar as possible for the purpose of efficiency and furnishing the CONSULTANT with information needed to satisfactorily complete the services.

4. REPORTING: The CONSULTANT will submit written reports to the TOWN on the status of professional services as specified in the scope of Work or at other times as required by an information request or reporting requirement by the HEART Committee.

5. TIME OF PERFORMANCE: The services of the CONSULTANT are to
commence on or about June 25, 2018
and shall be undertaken and completed in sequence as to assure their expeditious completion. All services required hereunder shall be completed no later than August 1, 2019.

6. COMPENSATION: The TOWN will pay the CONSULTANT a total fee from project grant funds in amount not to exceed $20,000.00, based on a mutually agreed upon invoice procedure.

7. WITHDRAWAL: Either the TOWN or the CONSULTANT may withdraw from this agreement for cause upon 15 days written notice. In case of withdrawal, all finished and unfinished material shall become the property of the TOWN. In the event of termination, the CONSULTANT will be compensated for services provided to the date of termination.

8. AMENDMENTS: This agreement may be amended as agreed to in writing by the signatories hereto.

9. NON-DISCRIMINATION: The CONSULTANT shall not discriminate against any employee or applicant for employment because of race, color, religion, gender, gender identity, sexual orientation, disability, handicap, or national origin.

10. INDEMNIFICATION: To the extent allowable by law, the CONSULTANT shall indemnify, defend, and hold the TOWN harmless from and against any and all claims, demand, liabilities, actions, causes of actions, cost and expenses caused by or arising out of or in connection with the services performed or delivered under this Agreement by reason of acts, inactions, omissions, negligence, reckless or intentional misconduct of the CONSULTANT their agents or employees.

11. CERTIFICATE OF INSURANCE: The CONSULTANT must provide the TOWN with a Certificate of Insurance General Liability, if applicable, and Worker's Compensation.

12. FORM W-9: The CONSULTANT must provide the TOWN with a
13. **CONFLICT OF INTEREST**: The CONSULTANT shall adhere to the mandates of the Massachusetts Conflict of Interest Statute

14. **COPYRIGHT**: No material prepared in whole or in part under this agreement shall be subject to copyright in the United States of America or in any other country. All material produced under the terms of this agreement is public property and cannot be copyrighted by either the CONSULTANT or the TOWN.

15. **SEVERABILITY**: If any provision of this Agreement is held invalid, the remainder of the agreement shall not be affected thereby, and all other parts of this agreement shall nevertheless be in full force and effect.

16. **ASSIGNMENT**: This Agreement may not be assigned by either party.

17. **GOVERNING LAW**: This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts.

18. **ENTIRE AGREEMENT**: This Agreement represents the entire understanding of the parties with respect to the subject matter address herein and supersedes and cancels all previous agreements between the parties.

IN WITNESS thereof, the TOWN and the CONSULTANT have executed this agreement as of the date above written TOWN:

By:

Date: June 21, 2018

Bernard R. Kubiak, Interim Administrator

**CONSULTANT**: By: Mal al

Mark Abrahams Principal, Abrahams Group

pato 6/21/2018

**Pioneer Valley Regional School District**
SCOPE OF WORK EFFICIENCY AND REGIONALIZATION GRANT STUDY

1. Project Overview
The Town of Northfield and The Town of Warwick have received an Efficiency and Regionalization grant from the Massachusetts Department of Revenue on behalf of Pioneer Valley Regional School District (PVRSD) to develop plans for increased operational efficiencies and potential regionalization among the Gill Montague and Franklin County Tech districts.

This group seeks consultant services to assist with the following: the analysis of options, the development of plans, engagement with community, and the recommendation of solutions. These solutions are intended to advance a high quality education while ensuring financial sustainability for our communities.

The four areas of focus identified by the HEART Committee are: 1) school closing analysis, 2) sustainable models of administrative structure for the PVRS district, 3) data gathering and analysis of the impact of school choice and charter on the district, and 4) recommendations for the updating of the PVRS District Agreement.

The Town of Northfield is the awarding and contracting authority for this procurement. The selected consultant must be able to begin work immediately and work must be targeted for completion by August 1, 2019.

Key elements for which consultant services are sought are listed below:

Modeling Consultant will model different scenarios for PVRSD, including the following:

1. School Closing Analysis analysis of the impact of closing one or two of the smallest schools in the PVRS district: Pearl Rhodes Elementary School in Leyden and Warwick Community School in Warwick.

Costs and benefits of closing one or both schools. Costs and benefits associated with the following such as: Impact on transportation times; are there rules and limits? Can towns be in the district for high school and have separate, independent elementary schools? If the district wants to close a school, what options does the town have to still have an elementary school and remain in the district?
Deliverables: a district-wide stakeholder meeting to gather community input as part of analysis and a district wide stakeholder meeting as part of results dissemination after analysis. Documentation of analysis shared with stakeholders.

Models of Administrative Structure given PVRSD’s current financial constraints and reduced enrollment, what administrative structure is recommended?

Deliverables: Provide models that include cost/benefit analysis for sharing administration with Gill Montague Regional School District and/or Franklin County Tech and for PVRSD without shared administration positions.

The consultant will explore several theoretical models. While it is expected that these are not the only possible future states, they will provide a continuum of possibilities from which recommendations can be drawn. Each option will be evaluated within several broad domains of consideration. These include: Quality of education. How will the model impact the quality of education delivered and, corresponding, student outcomes?• Financial (Economic). How does the model impact district and town finances? Logistical/Organizational. What are the logistical and organizational considerations of the model? Regulatory/Legal. What regulatory and legal considerations are present for each model? Political/Social. What are the political and/or social implications of the model? Contractual. What are the contractual considerations that need to be addressed?

Data Gathering & Analysis:

Analysis of the impact of school choice and charter on the district. Analysis of why students are choosing out of the district and why students are choosing into the district. Also, what would the impact of school closure be on school choice families? Once students are accepted they are students of the district; if there is limited space due to school consolidation what’s the impact on school choice families and what’s our obligation?
**Deliverables:** development of a survey tool to be used to gather and report data

4 Upgrading the PVRSD District Agreement The research, data gathering and modeling involved in this grant process may result in necessary changes to the district agreement. The consultant will outline necessary changes. The HEART Committee will function as an amendment committee and will support the dissemination of information related to District Agreement changes during the Department of Secondary and Elementary Education (DESE) and Town Meeting amendment process.

**Deliverables:** consultants will assist the HEART Committee in developing an updated District Agreement that will satisfy the legal requirements of DESE and will be ready for the district's annual 2019 meetings.

**Additional Deliverables:**

**Ongoing Communication:** Biweekly phone/email check in with the HEART Committee on progress on goals.

**Meetings:** Up to 3 evening public meetings with the PVRS School Committee and the PVRS community.

**Summary Report for the Department of Revenue:** consultant will provide the HEART Committee with a summary of analysis and data gathering, a description of community engagement in the study, and recommendations for next steps. *This summary report will be provided to the Department of Revenue no later than August 1, 2019.*

**Other Requirements:**

a) The Town of Northfield may cancel this contract, in whole or in part, at any time whenever such an act is deemed in its best interest. b) The Town of Northfield reserves the right to waive any informalities or to reject any and all quotes/proposals if it deems so to be in the Pioneer Valley
Regional School's best interest.

Recognizing the complexity of requested analysis, it is fully expected that subcontractors with specific experiences may be utilized. If any part of the scope of services under this agreement is to be completed by a subcontractor, the consultant will provide a complete description of the services to be subcontracted for along with a complete description of the qualifications and capabilities of the subcontractor. As part of the agreement, The Town of Northfield reserves the right to approve or disapprove any and all such subcontractors and to revoke any approval previously given. This project is being funded through the Fiscal Year 2018 & 2019 Community Compact Efficiency and Regionalization Grant. An award made under this agreement will be subject to the terms and conditions of the grant award.

The Town of Northfield is an Affirmative Action/Equal Opportunity Employer

g) The consultant has been selected by The Town of Northfield without regard to race, color, gender, gender identity, sexual orientation, disability, age, religion, political affiliation, or national origin. 
h) Any questions pertaining to this contract should be directed in writing to Tracy Rogers, Selectboard Chair Town of Northfield, at trogers.northfield@gmail.com, or Michele Giarusso, Chair of the HEART Committee at mgiarusso578@gmail.com

1) The fee for professional services and expenses is $20,000.00

2. Sharing of documents associated with this agreement may be addressed to:

HEART Committee c/o Northfield Board of Selectmen 69 Main Street Northfield, MA, 01360 Attention: Tracy Rogers

TOWN OF NORTHFIELD

www.northfieldma.gov

69 MAIN STREET NORTHFIELD, MASSACHUSETTS 01360 1017

Bernard Kubiak Interim Administrator

admin@northfieldma.gov

413.498 2901 x115
Sole Source Justification: Abrahams Group

Contract amount: $20,000.00

The Abrahams Group has particular expertise in the area of school finance, given the experience of its principal, Mark Abrahams, CPA. Mr. Abrahams has conducted numerous school audits, written extensively on school finances and provided training on Chapter 70 and other school funding legislation. At present he is serving as the fiscal overseer to two school systems.

The Abrahams Group was recently awarded a contract for similar services through a competitive procurement process with the Gill-Montague School District.

A discussion with the Community Compact staff, the time frame and amount of the grant all were considered in offering the contract to Abrahams Group.
Pioneer Valley RSD
FINANCIAL BASELINE ANALYSIS
NOVEMBER 19, 2018 COMMUNITY FORUM
Introduction

Gill-Montague contracted with The Abrahams Group and MARS to:

- **Goals** - Consultant will confirm and formalize the group’s goals, further refining and articulating intended outcomes. This will include definition and consensus on educational quality indicators.

- **Modeling** – Consultant will model different scenarios for the three districts, including the following:
  - “do nothing model” – a baseline starting with the FY19 budget for the three districts projected through FY 2023
  - a continuum of collaboration between GMRSD and FCTS, from shared staff, to shared student programs, to the creation of a comprehensive school on two campuses.
  - a continuum of collaboration between GMRSD and PVRSD, from shared central office administration, to superintendency union, to regionalization of the districts
  - collaboration among G-MRSD, FCTS, and PVRSD for shared staff and/or specialized student programs.

These models will examine educational, financial logistical / organizational, regulatory/legal, and political/social considerations.

- **Recommendations** – Consultant will develop a set of recommendations based on the benefits/barriers of each model (or combination thereof) to be presented to and considered by the districts. This will include an engagement plan (communication, sharing, input) and an implementation timeline with key tasks and resources articulated.
Introduction

The HEART Committee contracted with The Abrahams Group and MARS for the following:

- **School Closing Analysis** - analysis of the impact of closing one or two of the smallest schools in the PVRS district: Pearl Rhodes Elementary School in Leyden and Warwick Community School in Warwick.

- **Models of Administrative Structure** – given PVRSD’s current financial constraints and reduced enrollment, what administrative structure is recommended?

- **Analysis of the impact of school choice on the district.** Analysis of why students are choosing out of the district and why students are choosing into the district. Also, what would the impact of school closure be on school choice families? Once students are accepted they are students of the district; if there is limited space due to school consolidation what’s the impact on school choice families and what’s our obligation?

- **Updating the PVRSD District Agreement-The** research, data gathering and modeling involved in this grant process may result in necessary changes to the district agreement. The consultant will outline necessary changes. The HEART Committee will function as an amendment committee and will support the dissemination of information related to District Agreement changes during the Department of Secondary and Elementary Education (DESE) and Town Meeting amendment process.
Introduction

Today’s presentation includes the financial baseline

- The Do Nothing Scenario
- Projecting Pioneer Valley finances if the district “Does Nothing”
- Based on the FY19 budget
- Projections through FY23.

Today’s presentation also includes an update on the other scope of services for both the Gill Montague and HEART Committee (Pioneer Valley) scope of services.

Data has been compiled from the Districts and DESE and DOR websites and thus are considered public information, that again, needs to be validated.
Presenters

Mark Abrahams, The Abrahams Group

Steve Hemman, MARS
Baseline Methodology

- Based on the FY19 budget
- Worked with the Finance Director to develop and document assumptions to project FY20 – FY23
- Revenues and expenditures were projected by line-item through FY23
- Numbers may be off due to rounding
Pioneer Valley RSD Baseline
Pioneer Valley

Deficit

- Pioneer Valley’s financial numbers are not validated by DOR, DESE or a financial audit.

- Thus two scenarios are presented.
  - The first is based on the proposed legislation which allows the District to borrow up to $2 million over a 10-year period
  - The second is based on the District’s representation that the deficit is less than $600,000.
# Pioneer Valley Baseline

1. Based on a $2,000,000 Deficit Financing Bond, 10 Year, 5%

<table>
<thead>
<tr>
<th>Sources of Funds</th>
<th>FY19 Actual</th>
<th>Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Assessments</td>
<td>8,913,890</td>
<td>9,206,774</td>
<td>9,435,918</td>
<td>9,671,816</td>
<td>9,913,812</td>
<td>10,161,452</td>
</tr>
<tr>
<td>State Aid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter 70</td>
<td>4,128,881</td>
<td>4,148,841</td>
<td>4,174,182</td>
<td>4,195,842</td>
<td>4,222,664</td>
<td>4,246,905</td>
</tr>
<tr>
<td>Transportation</td>
<td>535,882</td>
<td>580,061</td>
<td>486,046</td>
<td>480,772</td>
<td>492,792</td>
<td>505,111</td>
</tr>
<tr>
<td>Charter School Reimbursement</td>
<td>102,994</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
</tr>
<tr>
<td>Medicaid</td>
<td>66,770</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
</tr>
<tr>
<td>Local Revenue</td>
<td>248,989</td>
<td>196,179</td>
<td>164,943</td>
<td>164,943</td>
<td>124,944</td>
<td>124,944</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>3,049</td>
<td>2,000</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
</tr>
<tr>
<td>Interest Income</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td>15,004</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Sources of Funds</td>
<td>14,015,260</td>
<td>14,223,865</td>
<td>14,334,600</td>
<td>14,605,465</td>
<td>14,844,521</td>
<td>15,128,922</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY19 Actual</th>
<th>Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>3,744,587</td>
<td>4,273,039</td>
<td>4,747,721</td>
<td>4,963,736</td>
<td>5,227,122</td>
<td>5,473,970</td>
</tr>
<tr>
<td>Bernardston</td>
<td>1,335,509</td>
<td>1,328,769</td>
<td>1,362,945</td>
<td>1,398,034</td>
<td>1,434,060</td>
<td>1,471,081</td>
</tr>
<tr>
<td>Leyden</td>
<td>509,190</td>
<td>455,607</td>
<td>469,240</td>
<td>477,281</td>
<td>486,836</td>
<td>500,307</td>
</tr>
<tr>
<td>Northfield</td>
<td>1,562,183</td>
<td>1,467,163</td>
<td>1,499,392</td>
<td>1,538,027</td>
<td>1,577,607</td>
<td>1,618,431</td>
</tr>
<tr>
<td>Warwick</td>
<td>796,240</td>
<td>650,379</td>
<td>687,158</td>
<td>684,388</td>
<td>702,052</td>
<td>720,253</td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,035</td>
<td>1,334,586</td>
<td>1,367,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,461,048</td>
<td>1,471,781</td>
<td>1,509,576</td>
<td>1,546,290</td>
<td>1,584,947</td>
</tr>
<tr>
<td>Total</td>
<td>13,999,149</td>
<td>14,223,865</td>
<td>14,927,211</td>
<td>15,404,879</td>
<td>15,937,172</td>
<td>16,480,084</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Excess (Deficiency) of Sources over Uses</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY19</td>
<td>Cumulative</td>
</tr>
<tr>
<td>16,111</td>
<td>-3,814,939</td>
</tr>
</tbody>
</table>

Numbers may be off due to rounding.
## Pioneer Valley Baseline

2. Based on a $600,000 Deficit Financing Bond, 10 Year, 5%

<table>
<thead>
<tr>
<th>Sources of Funds</th>
<th>FY18 Actual</th>
<th>Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Assessments</td>
<td>8,913,690</td>
<td>9,205,774</td>
<td>9,435,918</td>
<td>9,671,816</td>
<td>9,913,612</td>
<td>10,161,452</td>
</tr>
<tr>
<td>State Aid</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter 70</td>
<td>4,128,881</td>
<td>4,148,941</td>
<td>4,174,162</td>
<td>4,198,423</td>
<td>4,222,664</td>
<td>4,246,905</td>
</tr>
<tr>
<td>Transportation</td>
<td>535,882</td>
<td>680,961</td>
<td>460,046</td>
<td>480,772</td>
<td>492,792</td>
<td>505,111</td>
</tr>
<tr>
<td>Charter School Reimbursement</td>
<td>102,994</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
</tr>
<tr>
<td>Local Revenue</td>
<td>66,770</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>248,099</td>
<td>196,179</td>
<td>164,943</td>
<td>164,943</td>
<td>124,944</td>
<td>124,944</td>
</tr>
<tr>
<td>Interest Income</td>
<td>3,048</td>
<td>2,000</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
</tr>
<tr>
<td>Other</td>
<td>15,004</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Sources of Funds</td>
<td>14,015,260</td>
<td>14,223,865</td>
<td>14,334,600</td>
<td>14,606,466</td>
<td>14,844,521</td>
<td>15,128,922</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18 Actual</th>
<th>Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>3,744,597</td>
<td>4,273,039</td>
<td>4,537,721</td>
<td>4,759,686</td>
<td>5,027,642</td>
<td>5,280,466</td>
</tr>
<tr>
<td>Bernardston</td>
<td>1,355,609</td>
<td>1,328,769</td>
<td>1,362,945</td>
<td>1,398,034</td>
<td>1,434,060</td>
<td>1,471,051</td>
</tr>
<tr>
<td>Leyden</td>
<td>509,190</td>
<td>455,507</td>
<td>496,240</td>
<td>477,281</td>
<td>488,638</td>
<td>500,307</td>
</tr>
<tr>
<td>Northfield</td>
<td>1,562,183</td>
<td>1,461,763</td>
<td>1,499,392</td>
<td>1,536,027</td>
<td>1,577,697</td>
<td>1,618,431</td>
</tr>
<tr>
<td>Warwick</td>
<td>706,240</td>
<td>650,379</td>
<td>667,158</td>
<td>684,389</td>
<td>702,082</td>
<td>720,253</td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,038</td>
<td>1,334,686</td>
<td>1,387,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,461,648</td>
<td>1,471,781</td>
<td>1,508,678</td>
<td>1,546,290</td>
<td>1,584,947</td>
</tr>
<tr>
<td>Total</td>
<td>13,998,149</td>
<td>14,223,865</td>
<td>14,717,211</td>
<td>15,200,929</td>
<td>15,737,692</td>
<td>16,266,570</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Excess (Deficiency) of Sources over Uses</th>
<th>FY18 Actual</th>
<th>Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cumulative</td>
<td>-382,611</td>
<td>0</td>
<td>-594,465</td>
<td>-893,171</td>
<td>-1,137,647</td>
<td>-3,007,894</td>
</tr>
</tbody>
</table>

Numbers may be off due to rounding.
Pioneer Valley Rural Aid

- The District received a rural aid award letter from DESE in October 2018 for $92,593.
- DESE has not announced whether the District will receive rural aid beyond FY19.
- Rural aid receipts are to be placed in a special revenue fund. While guidance has not been received as to the specific use of the funds, it is likely that the District can transfer eligible general fund expenditures to the Rural Aid SRF which will free up $92,593 in the general fund.
- This number is NOT included in the baseline scenarios at this time.
Pioneer Valley

- Pioneer Valley presents its budget by DESE State Object Codes

- The major growth assumptions are

<table>
<thead>
<tr>
<th>Object</th>
<th>% Annual Increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-3</td>
<td>2.5%</td>
</tr>
<tr>
<td>4-5 + Supplies</td>
<td>2.5%</td>
</tr>
<tr>
<td>6</td>
<td>2.5%</td>
</tr>
<tr>
<td>7</td>
<td>0.0%</td>
</tr>
<tr>
<td>8</td>
<td>0.0%</td>
</tr>
<tr>
<td>Health</td>
<td>7.0%</td>
</tr>
<tr>
<td>Prop Ins</td>
<td>5.0%</td>
</tr>
<tr>
<td>Trans</td>
<td>2.5%</td>
</tr>
<tr>
<td>Tuition</td>
<td>2.5%</td>
</tr>
<tr>
<td>Heat, Electricity</td>
<td>6.0%</td>
</tr>
</tbody>
</table>

Deficit Loan Payment Amount Assume $200,000 a year for 10 years

Contribution to Supplemental: an amount equal to 0.25/0.50/0.75/1.00 per cent of the gross amount of the regional district budget for the prior FY
Chapter 70 Key Terms

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

- **A local contribution** represents the amount of local appropriations required to meet net school spending. This is a town-wide calculation, one each for the four member towns.

- **A local district contribution** is the amount of the town-wide calculation, allocated to each of the regional districts to which each town belongs.

- **Chapter 70 Aid** represents the amount of state aid to finance the state share of the foundation budget. Chapter 70 aid is generally composed of Foundation Aid, and or Minimum Aid.
Chapter 70 Key Terms

- The sum of the local contribution plus Chapter 70 aid is the required net school spending. Required net school spending must be equal to or greater than the foundation budget. In general, the foundation formula is:

  Required Net School Spending = Local District Contribution + Ch 70 Aid

  Required Net School Spending = > Foundation Budget

- Pioneer Valley spends well in excess of the required net school spending
Pioneer Chapter 70 Trends

Graph showing trends from FY03 to FY18 with labels for Foundation Budget, C70 Aid, Required NSS, and Actual NSS.
## Pioneer Chapter 70 Trends

**0750 Pioneer**

<table>
<thead>
<tr>
<th>FY</th>
<th>Foundation Enrolment</th>
<th>% Chg</th>
<th>Foundation Budget</th>
<th>% Chg</th>
<th>Required Local Contribution</th>
<th>% Chg</th>
<th>Required Net School Spending</th>
<th>% Chg</th>
<th>Actual NSS</th>
<th>% Chg</th>
<th>Dollars Over/Under Requirement</th>
<th>% Over/Under</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY18</td>
<td>943</td>
<td>-1.8%</td>
<td>7,722,039</td>
<td>1.2%</td>
<td>4,259,679</td>
<td>1.2%</td>
<td>4,078,816</td>
<td>1.2%</td>
<td>8,338,495</td>
<td>2.1%</td>
<td>11,937,107</td>
<td>7.0%</td>
</tr>
<tr>
<td>FY19</td>
<td>937</td>
<td>-0.6%</td>
<td>8,137,059</td>
<td>5.4%</td>
<td>4,327,532</td>
<td>3.831,402</td>
<td>-2.4%</td>
<td>8,609,941</td>
<td>3.831,402</td>
<td>0.4%</td>
<td>11,737,126</td>
<td>1.7%</td>
</tr>
<tr>
<td>FY20</td>
<td>914</td>
<td>-2.5%</td>
<td>8,230,102</td>
<td>1.4%</td>
<td>4,422,230</td>
<td>4,195,800</td>
<td>5.4%</td>
<td>8,618,030</td>
<td>8,618,030</td>
<td>3.7%</td>
<td>11,971,585</td>
<td>2.0%</td>
</tr>
<tr>
<td>FY21</td>
<td>917</td>
<td>1.4%</td>
<td>8,253,519</td>
<td>0.2%</td>
<td>4,565,541</td>
<td>3,950,682</td>
<td>-5.0%</td>
<td>8,514,226</td>
<td>8,514,226</td>
<td>-1.2%</td>
<td>12,075,630</td>
<td>0.9%</td>
</tr>
<tr>
<td>FY22</td>
<td>894</td>
<td>-3.6%</td>
<td>8,098,759</td>
<td>-2.0%</td>
<td>4,668,314</td>
<td>3,971,891</td>
<td>0.5%</td>
<td>8,640,205</td>
<td>8,640,205</td>
<td>1.5%</td>
<td>12,253,807</td>
<td>0.6%</td>
</tr>
<tr>
<td>FY23</td>
<td>888</td>
<td>0.4%</td>
<td>8,564,268</td>
<td>5.7%</td>
<td>4,778,263</td>
<td>4,007,011</td>
<td>0.9%</td>
<td>8,786,074</td>
<td>8,786,074</td>
<td>1.7%</td>
<td>14,230,269</td>
<td>17.2%</td>
</tr>
<tr>
<td>FY24</td>
<td>837</td>
<td>-6.8%</td>
<td>7,994,487</td>
<td>-6.7%</td>
<td>4,761,551</td>
<td>4,039,736</td>
<td>0.9%</td>
<td>8,790,287</td>
<td>8,790,287</td>
<td>0.0%</td>
<td>12,776,611</td>
<td>10.3%</td>
</tr>
<tr>
<td>FY25</td>
<td>802</td>
<td>-4.2%</td>
<td>7,816,277</td>
<td>-2.2%</td>
<td>4,893,095</td>
<td>4,044,786</td>
<td>0.5%</td>
<td>8,851,881</td>
<td>8,851,881</td>
<td>0.7%</td>
<td>12,284,347</td>
<td>-3.9%</td>
</tr>
<tr>
<td>FY26</td>
<td>751</td>
<td>-6.4%</td>
<td>7,481,050</td>
<td>-4.3%</td>
<td>4,776,253</td>
<td>4,067,551</td>
<td>0.5%</td>
<td>8,843,816</td>
<td>8,843,816</td>
<td>-0.1%</td>
<td>12,872,169</td>
<td>4.8%</td>
</tr>
<tr>
<td>FY27</td>
<td>720</td>
<td>-4.1%</td>
<td>7,219,382</td>
<td>-3.5%</td>
<td>4,777,146</td>
<td>4,107,161</td>
<td>1.0%</td>
<td>8,884,307</td>
<td>8,884,307</td>
<td>0.5%</td>
<td>14,634,398</td>
<td>13.7%</td>
</tr>
<tr>
<td>FY28*</td>
<td>724</td>
<td>0.6%</td>
<td>7,476,666</td>
<td>2.6%</td>
<td>4,744,769</td>
<td>4,128,881</td>
<td>0.5%</td>
<td>8,873,650</td>
<td>8,873,650</td>
<td>-1.1%</td>
<td>13,886,962</td>
<td>-5.1%</td>
</tr>
</tbody>
</table>

- **Foundation enrollment declined by 23.6%**
- **Foundation budget declined by 6.5%**
- **Required district local contribution increased by 12.1%**
- **Chapter 70 increased by 0.7%**
- **Required net school spending increased by 6.5%**
- **Actual net school spending increased by 22.6%**
- **Pioneer is 64.7% above the NSS requirement, the statewide average is 23.9% (FY17 actual)**

*FY08-17 Change: -223 -23.6% -500,647 -6.5% -357,467 28,345 0.7% 545,812 545,812 6.5% 2,667,291 22.6% 2,151,499 59.8%*
Because the district receives significantly more prior year Chapter 70 prior (base) aid in excess of foundation aid, Pioneer Valley should see minimal Chapter 70 aid increases based on minimum aid.

<table>
<thead>
<tr>
<th>FY19 Chapter 70 Summary</th>
<th>750 Pioneer Aid Calculation FY19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prior Year Aid</td>
<td></td>
</tr>
<tr>
<td>1. Chapter 70 FY18</td>
<td>4,128,881</td>
</tr>
<tr>
<td>Foundation Aid</td>
<td></td>
</tr>
<tr>
<td>2. Foundation Budget FY19</td>
<td>7,354,253</td>
</tr>
<tr>
<td>3. Required district contribution FY19</td>
<td>4,872,782</td>
</tr>
<tr>
<td>4. Foundation aid (2-3)</td>
<td></td>
</tr>
<tr>
<td>5. Increase over FY18 (4-1)</td>
<td>2,481,471</td>
</tr>
<tr>
<td>Minimum Aid</td>
<td></td>
</tr>
<tr>
<td>6. Minimum $30 per pupil increase</td>
<td>21,060</td>
</tr>
<tr>
<td>Non-Operating District Reduction to Foundation</td>
<td>0</td>
</tr>
<tr>
<td>7. Reduction to foundation</td>
<td></td>
</tr>
<tr>
<td>Additional Aid Increment</td>
<td></td>
</tr>
<tr>
<td>8. Adjustment based on H. 4401 Ch. 70a</td>
<td>0</td>
</tr>
<tr>
<td>Transitional Relief for Impact of Change in Low-Income Measure</td>
<td>0</td>
</tr>
<tr>
<td>9. Relief for impact of change in measure</td>
<td>0</td>
</tr>
<tr>
<td>FY19 Chapter 70 Aid</td>
<td></td>
</tr>
<tr>
<td>10. sum of line 1, 5, 8, 9 minus 7</td>
<td>4,149,941</td>
</tr>
</tbody>
</table>

- PV receives about $4.1m in Ch 70 aid
- Its base (prior year aid) exceeds its foundation aid by about $1.7m
- The State must fund each district its foundation aid, the difference between its foundation budget and required contributions from its member towns (required district contributions). This is the grandfathering effect, that every district will receive at least its prior year base aid
- Thus the District receives minimum aid at $30 per foundation enrollment
$2,000,000 SUMMARY

<table>
<thead>
<tr>
<th></th>
<th>FY18 Actual</th>
<th>FY18 Revised</th>
<th>FY19 Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sources of Funds</td>
<td>14,015,260</td>
<td>14,223,865</td>
<td>14,394,600</td>
<td>14,606,465</td>
<td>14,844,521</td>
<td>15,128,922</td>
<td></td>
</tr>
<tr>
<td>Total Uses of Funds</td>
<td>13,999,149</td>
<td>14,223,865</td>
<td>14,927,211</td>
<td>15,404,979</td>
<td>15,937,172</td>
<td>16,460,084</td>
<td></td>
</tr>
<tr>
<td>Excess (Deficiency) of Sources over Uses Cumulative</td>
<td>16,111</td>
<td>0</td>
<td>-592,611</td>
<td>-798,515</td>
<td>-1,092,651</td>
<td>-1,331,162</td>
<td></td>
</tr>
</tbody>
</table>

$600,000 SUMMARY

<table>
<thead>
<tr>
<th></th>
<th>FY18 Actual</th>
<th>FY18 Revised</th>
<th>FY19 Revised</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Sources of Funds</td>
<td>14,015,260</td>
<td>14,223,865</td>
<td>14,334,600</td>
<td>14,606,465</td>
<td>14,844,521</td>
<td>15,128,922</td>
<td></td>
</tr>
<tr>
<td>Total Uses of Funds</td>
<td>13,999,149</td>
<td>14,223,865</td>
<td>14,717,211</td>
<td>15,200,929</td>
<td>15,737,692</td>
<td>16,266,570</td>
<td></td>
</tr>
<tr>
<td>Excess (Deficiency) of Sources over Uses Cumulative</td>
<td>16,111</td>
<td>0</td>
<td>-382,611</td>
<td>-594,465</td>
<td>-893,171</td>
<td>-1,137,647</td>
<td></td>
</tr>
</tbody>
</table>

PV’s budget projected gap increases each year in both scenarios.
PV’s cumulative projected gap ranges between $3 m and $3.8 m by FY 2023.
Summary

- These baseline, based on FY19 budgets and the assumptions contained herein, present the “Do Nothing” scenario for Pioneer Valley to project operating results through FY 2023 if the district does not change their revenues or expenditures.

- Pioneer Valley is projected to have deficits in each year through FY 2023.

- We can generally conclude that these results are not sustainable; the district will need to change its business models.

- That leads us to the second part of our presentation on the status of the Gill Montague and HEART Committee scopes of services.
For More Information

THE ABRAHAMS GROUP
Mark Abrahams, CPA
President, The Abrahams Group
508 788-9172
Bettergov@aol.com
www.theabrahamsgroup.com

MARS
Stephen Hemman
Deputy Executive Director
978 821-2890
Mars.hemman@marsregionals.net
www.massassociationregionalschools.org
The HEART Committee
Presents

A Community Forum about the PVRSD

Wednesday, December 5th at 6:30pm

Pioneer Valley Regional School Cafeteria, 97 F Sumner Turner Drive, Northfield

Data related to the sustainability of the school district will be presented by Consultants from the Massachusetts Association of Regional Schools. This will include:

- Financial Baseline Analysis
- School Closure Analysis

All members of the community are invited to attend this forum to better understand the future of our school district and to express ideas about how to move forward.

H.E.A.R.T Committee
www.facebook.com/HEARTCte
heartcte@gmail.com
BERNARDSTON

School Information:
Bernardston Elementary School
37 School Road
Bernardston, MA 01337
Grades: PK-6
Opened: 1950
Last Renovation: 1997
Square Footage: 36,870
Enrollment: 159 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>16</td>
<td>18</td>
<td>19</td>
<td>18</td>
<td>22</td>
<td>23</td>
<td>17</td>
<td>26</td>
<td>159</td>
</tr>
<tr>
<td>2017-18</td>
<td>16</td>
<td>18</td>
<td>18</td>
<td>18</td>
<td>22</td>
<td>22</td>
<td>14</td>
<td>22</td>
<td>157</td>
</tr>
<tr>
<td>2016-17</td>
<td>23</td>
<td>19</td>
<td>20</td>
<td>22</td>
<td>15</td>
<td>21</td>
<td>29</td>
<td>27</td>
<td>176</td>
</tr>
<tr>
<td>2015-16</td>
<td>15</td>
<td>18</td>
<td>20</td>
<td>16</td>
<td>21</td>
<td>26</td>
<td>25</td>
<td>24</td>
<td>165</td>
</tr>
<tr>
<td>2014-15</td>
<td>13</td>
<td>13</td>
<td>22</td>
<td>22</td>
<td>21</td>
<td>20</td>
<td>39</td>
<td>22</td>
<td>172</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students (2018-19 school year there are 22 students).

Bernardston Elementary School has a total student population of 159 students, with one classroom for each grade.

Classroom capacity is approximately 25 students per classroom, with one classroom currently with 26 students.

There are 8 general classrooms in use, and 7 other classrooms used for Title I, PT/Speech, Music, Art, Special Education K-3, and 4-6, and an annex for Grades 2/3/6.

There is a library, computer lab and nurse’s office.

There is a kitchen, cafeteria, and gym (with stage) located in basement.

There is an elevator, so building is handicap accessible.

OT/Psychologist/Adjustment Counselor share office space.

There is a conference room and Out of School Time Program office.

The school does offer a before and after school program.

The school shares their principal with Pearl E. Rhodes Elementary School.

School start time is 8:50 and requires three buses to transport students to school. The Town of Bernardston covers 23.4 square miles.
School Attending Children Report:

<table>
<thead>
<tr>
<th></th>
<th>Local Public Schools</th>
<th>Academic Regional Schools</th>
<th>Technical Regional Schools</th>
<th>Vocational Schools</th>
<th>Collaboratives</th>
<th>Charter Schools</th>
<th>Out-of-District Public Schools</th>
<th>Home Schooled</th>
<th>In State Private Parochial Schools</th>
<th>Out of State Private Parochial Schools</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-17</td>
<td>0</td>
<td>238</td>
<td>21</td>
<td>0</td>
<td>8</td>
<td>20</td>
<td>0</td>
<td>17</td>
<td>8</td>
<td>8</td>
<td>312</td>
</tr>
<tr>
<td>2015-16</td>
<td>0</td>
<td>238</td>
<td>20</td>
<td>0</td>
<td>5</td>
<td>12</td>
<td>3</td>
<td>22</td>
<td>6</td>
<td>6</td>
<td>306</td>
</tr>
<tr>
<td>2014-15</td>
<td>0</td>
<td>233</td>
<td>24</td>
<td>0</td>
<td>5</td>
<td>15</td>
<td>2</td>
<td>16</td>
<td>4</td>
<td>4</td>
<td>299</td>
</tr>
</tbody>
</table>

Approximately 76% of Bernardston’s student population attends Pioneer Valley Regional School District.

Students school choice out:

<table>
<thead>
<tr>
<th>DISTRICT_NAME</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bernardston</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conway</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Deerfield</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Greenfield</td>
<td></td>
<td>3</td>
<td>1</td>
<td>6</td>
<td>18</td>
<td>5</td>
</tr>
<tr>
<td>Northampton</td>
<td></td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Sunderland</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>Whately</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Four Rivers Charter Public</td>
<td>2</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>14</td>
<td>13</td>
</tr>
<tr>
<td>Pioneer Valley Performing Arts Charter Public</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Pioneer Valley Chinese Immersion Charter (District)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Frontier</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Gill-Montague</td>
<td>4</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Mohawk Trail</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>New Salem-Wendell</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Massachusetts Virtual Academy at Greenfield Commonwealth Virtual District</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TEC Connections Academy Commonwealth Virtual School District</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>8</td>
<td>11</td>
<td>21</td>
<td>19</td>
<td>50</td>
<td>23</td>
</tr>
</tbody>
</table>
EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th></th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bernardston Elementary School</td>
<td>$1,125,709</td>
<td>$1,163,404</td>
</tr>
<tr>
<td>Schedule 3 Function 2000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Students</td>
<td>176</td>
<td>157</td>
</tr>
<tr>
<td>Cost Per Student</td>
<td>$6,396</td>
<td>$7,410</td>
</tr>
</tbody>
</table>

Should Leyden elementary school close, Bernardston class sizes would increase as follows for the 2019-20 school year (with assumption that school choice students remain in district):

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>16*</td>
<td>27</td>
<td>23</td>
<td>26</td>
<td>25</td>
<td>25</td>
<td>29</td>
<td>20</td>
<td>191</td>
</tr>
</tbody>
</table>

*average historical estimate

While consideration will need to be given to increasing classrooms in grades K, 2 and 5, Bernardston could easily absorb the student population of Pearl Rhodes Elementary School.

The area in front of the school is sufficient to safely accommodate two more buses and parent vehicle traffic in the parking lot loop.

Merging these two schools will allow the principal to be on site at all times and eliminate the need for one teacher stipend to assume control when he is required to be in a different building.

Teaching staff will have better opportunity to collaborate with more colleagues on a daily basis.

OT/PT/SLP/School Psychologist and Adjustment Counselor can better utilize their time in servicing students by eliminating travel between schools.

Pearl Rhodes Elementary students will have access to single grade classroom curriculum structure and larger peer groups, which is optimal for social and emotional learning development.
Municipal Information

Bernardston is a town of 2,101 residents (2015) with an Open Town Meeting form of government, which is administered by a Town Coordinator. The FY18 tax rate is $20.47, which is the same for residential and commercial property. Residential property represents 86% of the total tax levy.

Bernardston’s 2018 Free Cash balance was $276,736, and 2017 Stabilization balance was $365,875. There is an Excess Capacity of $2,747, and they are taxing the full 2.5%. The Override Capacity is $1,000,481.

As of 2018, Bernardston has 265 vacant land parcels, which represents potential growth should all parcels be buildable. Bernardston has seen a small increase in the Single Family Parcel count from 731 parcels in 2010, to 738 parcels in 2018.

Bernardston’s education appropriation ($3,066,599) represents 64% of the 2017 total general budget expenditures ($4,827,156), which is an increase from 59% in 2008 (education: $2,577,189; total general budget: $4,372,315).

Bernardston’s FY19 Minimum Local Contribution for Pioneer Valley Regional School District increased $56,472 from FY18, which represents 28% of their FY19 Total New Revenue of $201,049.

Bernardston’s school building is in good shape, with new roof (less than 5 years old), and no outstanding issues with heating, plumbing and electrical systems.
LEYDEN

School Information:
Pearl E. Rhodes Elementary School
7 Brattleboro Road
Leyden, MA 01301
Grades: PK-4
Opened: 1950
Last Renovation: 1991
Square Footage: 7,050
Enrollment: 33 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>6</td>
<td>6</td>
<td>7</td>
<td>5</td>
<td>3</td>
<td>6</td>
<td>0*</td>
<td>0*</td>
<td>33</td>
</tr>
<tr>
<td>2017-18</td>
<td>3</td>
<td>8</td>
<td>7</td>
<td>2</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>33</td>
</tr>
<tr>
<td>2016-17</td>
<td>4</td>
<td>8</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>7</td>
<td>39</td>
</tr>
<tr>
<td>2015-16</td>
<td>10</td>
<td>6</td>
<td>8</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>47</td>
</tr>
<tr>
<td>2014-15</td>
<td>5</td>
<td>9</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>42</td>
</tr>
</tbody>
</table>

* Students in 5th and 6th grade were moved to Bernardston Elementary School in the 2018-19 school year.

Numbers reflect school choice students (2018-19 six total students - three in Grade 2, one in Grade 3, and two in Grade 4).

Leyden’s Elementary School has a total student population of 32 students, which has resulted in mixed grade classrooms:

Grade PK/K – 1 classroom
Grade 1/2 – 1 classroom
Grade 3/4 – 1 classroom

Classroom capacity is approximately 20 students per classroom.

The kitchen and small cafeteria is located at the main entrance of the school and is where visitors to building are received.

Art, Music, and PE do not have dedicated spaces, so classes are held in cafeteria.

IEP meetings are now held in separate space that is also a staff room, which is a privacy concern.

The technology space and library are located in the basement of the building.
There is not an elevator in the building, and the egress door in basement is not handicap accessible.

There is a reported mold issue in the basement spaces utilized by students.

Special Education and Speech share space for providing services.

OT/PT/Adjustment Counselor share office space.

There is also a shared staff room and student time out area.

The school has offered a before or after school program for parents that work in past years. While one was offered in the 2018-19 school year, no families have utilized it at this time.

The school shares a principal with Bernardston’s elementary school, which Bernardston’s principal receives a stipend for.

School start time is 8:40 and requires two buses to transport students to school. The Town of Leyden covers 18.0 square miles.

Pearl E. Rhodes Elementary School is located approximately 6.6 miles, or 13 minutes from Bernardston Elementary school.

School Attending Children Report:

<table>
<thead>
<tr>
<th></th>
<th>Local Public Schools</th>
<th>Academic Regional Schools</th>
<th>Vocational Technical Regional Schools</th>
<th>Collaboratives</th>
<th>Charter Schools</th>
<th>Out-of-District Public Schools</th>
<th>Home Schooled</th>
<th>In State Private and Parochial Schools</th>
<th>Out of State Private and Parochial Schools</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leyden</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2016-17</td>
<td>0</td>
<td>43</td>
<td>6</td>
<td>0</td>
<td>0</td>
<td>9</td>
<td>7</td>
<td>6</td>
<td>0</td>
<td>71</td>
</tr>
<tr>
<td>2015-16</td>
<td>0</td>
<td>40</td>
<td>9</td>
<td>0</td>
<td>0</td>
<td>13</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>70</td>
</tr>
<tr>
<td>2014-15</td>
<td>0</td>
<td>41</td>
<td>12</td>
<td>0</td>
<td>0</td>
<td>6</td>
<td>9</td>
<td>2</td>
<td>0</td>
<td>70</td>
</tr>
</tbody>
</table>

Approximately 61% of Leyden’s student population attend Pioneer Valley Regional School District.

Students school choice out:

<table>
<thead>
<tr>
<th></th>
<th>DISTRICT_NAME</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leyden</td>
<td>Deerfield</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greenfield</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>6</td>
<td>12</td>
<td>9</td>
</tr>
<tr>
<td></td>
<td>Whately</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>Frontier</td>
<td></td>
<td></td>
<td></td>
<td>1</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Gill-Montague</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td></td>
<td>Mohawk Trail</td>
<td>2</td>
<td></td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>4</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>6</td>
<td>7</td>
<td>7</td>
<td>13</td>
<td>18</td>
<td>14</td>
</tr>
</tbody>
</table>
The Pioneer FY19 budget lists the following costs for Leyden’s Elementary School:

Principal: $10,000
Teacher in charge: $1,750
Administrative Assistant: $13,020
Principal travel: $500
Principal office supplies: $450
Substitutes: $6,900
Cafeteria worker/Library Instructional Assistant: $12,121
SN Teacher salaries: $46,744
Classroom Instructional Assistant: $18,507 ?
Education equipment: $600
Student supplies: $3,250 ?
Math supplies: $1,500 ?
ELA supplies: $2,500
Library supplies: $750
Nurse salary: $28,455
Physician salary: $300
Custodial salary: $13,201
Custodial supplies: $2,250
Fuel: $7,800
Light/power: $7,700
Water: $1,920
Telephone: $1,000
Maintenance building/equipment: $17,700
Total: $198,918

Should Leyden elementary school close, the savings would be approximately:

1. $198,918 (without consideration of unemployment payments).

The potential loss of revenue should school choice students choose not to remain in district would be $30,000.

EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th></th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pearl Rhodes Elementary School</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$404,814</td>
<td>$626,557</td>
</tr>
<tr>
<td>Students</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Cost Per Student</td>
<td>$10,380</td>
<td>$18,987</td>
</tr>
</tbody>
</table>
The size and location of building is optimal to be utilized by town for use by the Council on Aging due to access to full kitchen and cafeteria.

The main floor of the building can also be utilized by the Town of Leyden for office space.

The furniture currently in the building is not needed by the district and can remain with the building. School technology and equipment would be remain with the district.

The 5th and 6th grade students have already been merged into the Bernardston Elementary School successfully.
Municipal Information

Leyden is a town of 713 residents (2015) with an Open Town Meeting form of government, which is administered by a three member Board of Selectmen. The FY18 tax rate is $16.99, which is the same for residential and commercial property. Residential property represents 95% of their total tax levy.

Leyden 2018 Free Cash balance was $73,636, and 2017 Stabilization balance was $181,279. There is an Override Capacity of $341,199 which drives the inability to tax the full 2.5%, so they have $251,483 in Excess Capacity. Leyden is very close to the Tax Ceiling, and therefore should exercise caution when considering override requests.

As of 2018, Leyden has 194 vacant land parcels, which represents potential growth should all parcels be buildable. However, Leyden has seen a decrease in the Single Family Parcel count from 254 parcels in 2010, to 249 parcels in 2018.

Leyden’s education appropriation ($882,409) represents 55% of the 2017 total general budget expenditures ($1,601,304), which is a decrease from 60% in 2008 (education: $984,766; total general budget: $1,650,081).

Leyden’s FY19 Minimum Local Contribution for Pioneer Valley Regional School District increased $14,376 from FY18, which represents 23% of the FY19 Total New Revenue of $62,756.
NORTHFIELD

School Information:
Northfield Elementary School
104 Main Street
Northfield, MA 01360
Grades: PK-6
Opened: 1910
Last Renovation: 1991
Square Footage: 42,000
Enrollment: 185 students

<table>
<thead>
<tr>
<th>Enrollmen</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>18</td>
<td>24</td>
<td>23</td>
<td>22</td>
<td>27</td>
<td>24</td>
<td>21</td>
<td>26</td>
<td>185</td>
</tr>
<tr>
<td>2017-18</td>
<td>14</td>
<td>24</td>
<td>20</td>
<td>24</td>
<td>26</td>
<td>22</td>
<td>25</td>
<td>31</td>
<td>186</td>
</tr>
<tr>
<td>2016-17</td>
<td>14</td>
<td>16</td>
<td>24</td>
<td>20</td>
<td>28</td>
<td>28</td>
<td>28</td>
<td>35</td>
<td>186</td>
</tr>
<tr>
<td>2015-16</td>
<td>14</td>
<td>23</td>
<td>20</td>
<td>23</td>
<td>29</td>
<td>28</td>
<td>34</td>
<td>29</td>
<td>200</td>
</tr>
<tr>
<td>2014-15</td>
<td>15</td>
<td>17</td>
<td>24</td>
<td>28</td>
<td>24</td>
<td>34</td>
<td>31</td>
<td>23</td>
<td>196</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students (2018-19 school year there are 3 students).

Northfield Elementary School has a total student population of 185 students, with the following classroom configuration:

Grade PK – 1 classroom

Grade K – 2 classrooms (Note: due to donation, one of the classrooms can only be used for Preschool or Kindergarten)

Grade 1 – 2 classrooms

Grade 2 – 1 classroom

Grade 3 – 2 classrooms

Grade 4 – 1 classroom

Grade 5 – 1 classroom

Grade 6 – 1 classroom

Special Education District-Wide Programs – 2 classrooms

Special Education Resource/Services Rooms – 3 classrooms

There are two classrooms currently not being used.

There is a library, computer lab, gym, and large nurse’s office.
There are art and music classrooms.

There is a kitchen and large cafeteria with 5 lunch sessions. Northfield prepares and staff member delivers food to Warwick, then remains to serve students.

There is an elevator, so building is handicap accessible.

The school offers a before and after school program.

The school has a full-time principal.

School start time is 8:55 and requires four buses to transport students to school. The Town of Northfield covers 35.4 square miles.

School Attending Children Report:

<table>
<thead>
<tr>
<th></th>
<th>Local Public Schools</th>
<th>Academic Regional Schools</th>
<th>Technical Regional Schools</th>
<th>Collaboratives</th>
<th>Charter Schools</th>
<th>Out-of-District Public Schools</th>
<th>Home Schooled</th>
<th>In-State Private and Parochial Schools</th>
<th>Out-of-State Private and Parochial Schools</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northfield</td>
<td>2016-17</td>
<td>0</td>
<td>301</td>
<td>35</td>
<td>0</td>
<td>10</td>
<td>16</td>
<td>31</td>
<td>3</td>
<td>408</td>
</tr>
<tr>
<td></td>
<td>2015-16</td>
<td>0</td>
<td>316</td>
<td>42</td>
<td>0</td>
<td>7</td>
<td>17</td>
<td>16</td>
<td>35</td>
<td>436</td>
</tr>
<tr>
<td></td>
<td>2014-15</td>
<td>0</td>
<td>344</td>
<td>39</td>
<td>1</td>
<td>6</td>
<td>14</td>
<td>16</td>
<td>27</td>
<td>441</td>
</tr>
</tbody>
</table>

Approximately 74% of Northfield's student population attends Pioneer Valley Regional School District.

Students school choice out:

<table>
<thead>
<tr>
<th>DISTRICT_NAME</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Northfield Deerfield</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>6</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Northfield Greenfield</td>
<td>10</td>
<td>2</td>
<td>3</td>
<td>5</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>Northfield Four Rivers Charter Public</td>
<td>3</td>
<td>4</td>
<td>6</td>
<td>7</td>
<td>20</td>
<td>8</td>
</tr>
<tr>
<td>Northfield Amherst-Pelham</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield Athol-Royalston</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield Frontier</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>Northfield Gill-Montague</td>
<td>4</td>
<td>4</td>
<td>7</td>
<td>3</td>
<td>8</td>
<td>9</td>
</tr>
<tr>
<td>Northfield Mohawk Trail</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield Quabbin</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Northfield TEC Connections Academy</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield Commonwealth Virtual School District</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>20</td>
<td>14</td>
<td>21</td>
<td>20</td>
<td>46</td>
<td>29</td>
</tr>
</tbody>
</table>
EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Northfield Elementary School</th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$1,507,964</td>
<td>$1,491,925</td>
</tr>
<tr>
<td>Students</td>
<td>186</td>
<td>186</td>
</tr>
<tr>
<td>Cost Per Student</td>
<td>$8,107</td>
<td>$8,021</td>
</tr>
</tbody>
</table>

Should Warwick's elementary school close, Northfield class sizes would increase as follows for the 2019-20 school year (with assumption that school choice students remain in district):

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>16</td>
<td>20+</td>
<td>31</td>
<td>35</td>
<td>31</td>
<td>32</td>
<td>34</td>
<td>25</td>
<td>222</td>
</tr>
</tbody>
</table>

While consideration will need to be given to reconfiguring classrooms to include two unused classroom spaces, Northfield could absorb the student population of Warwick Community School. Northfield would need 14 classrooms (2 classrooms for each grade except PK and grade 6).

The area in front of the school is sufficient to safely accommodate two more buses.

Merging these two schools will provide Warwick students with a principal on site full-time and will eliminate the need for one of the two teacher stipends (Warwick).

Teaching staff will have better opportunity to collaborate with more colleagues who teach their grade level on a daily basis.

OT/PT/SLP/School Psychologist and Adjustment Counselor can better utilize their time in servicing students by eliminating travel between schools.

Warwick Community Elementary students will have access to single grade classroom curriculum structure and larger peer groups, which is optimal for social and emotional learning development.

Warwick middle and high school students currently travel to Northfield to attend school, therefore bus route configurations are already established on a yearly basis between these two towns.
Municipal Information

Northfield is a town of 2,992 residents (2015) with an Open Town Meeting form of government, which is administered by a Town Administrator. The FY18 tax rate is $17.86, which is the same for residential and commercial property. Residential property represents 63% of the total tax levy.

Northfield’s 2018 Free Cash balance was $547,226, and 2017 Stabilization balance was $688,094. There is an Excess Capacity of $163,236, so they are not taxing the full 2.5%. The Override Capacity is $2,918,601.

As of 2018, Northfield has 485 vacant land parcels, which represents potential growth should all parcels be buildable. Northfield has seen a decrease in the Single Family Parcel count from 1,071 parcels in 2010, to 1,070 parcels in 2018.

Northfield’s education appropriation ($5,010,428) represents 60% of the 2017 total general budget expenditures ($8,385,185), which is a decrease from 62% in 2008 (education: $4,027,947; total general budget: $6,452,120).

Northfield’s FY19 Minimum Local Contribution for Pioneer Valley Regional School District increased $77,862 from FY18, which represents 17% of the FY19 Total New Revenue of $458,487.

Northfield is strong supporter of their schools’ capital project and maintenance needs, with recent parking lot repaving, door replacement, and plans for electrical rewiring.

The town and district plan to apply for a MSBA grant to address heating system and windows replacement.
WARWICK

School Information:
Warwick Community School
41 Winchester Road
Warwick, MA 01378
Grades: PK-6
Opened: 1999
Last Renovation: none
Square Footage: 17,236
Enrollment: 58 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>2</td>
<td>7</td>
<td>12</td>
<td>9</td>
<td>5</td>
<td>10</td>
<td>4</td>
<td>9</td>
<td>58</td>
</tr>
<tr>
<td>2017-18</td>
<td>4</td>
<td>10</td>
<td>9</td>
<td>6</td>
<td>11</td>
<td>4</td>
<td>8</td>
<td>7</td>
<td>59</td>
</tr>
<tr>
<td>2016-17</td>
<td>0</td>
<td>8</td>
<td>6</td>
<td>10</td>
<td>3</td>
<td>8</td>
<td>11</td>
<td>11</td>
<td>57</td>
</tr>
<tr>
<td>2015-16</td>
<td>2</td>
<td>4</td>
<td>9</td>
<td>4</td>
<td>7</td>
<td>13</td>
<td>10</td>
<td>2</td>
<td>56</td>
</tr>
<tr>
<td>2014-15</td>
<td>5</td>
<td>10</td>
<td>3</td>
<td>8</td>
<td>11</td>
<td>7</td>
<td>1</td>
<td>10</td>
<td>55</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students, which at 27 students represents a little less than half of student population. Principal advised there are 4 new students who have recently moved into town which are not reflected in these numbers.

Warwick’s Elementary School has a total student population of 58 students, which has resulted in dual grade classrooms:

Grade PK/K – 1 classroom
Grade 1/2 – 1 classroom
Grade 3/4 – 1 classroom
Grade 5/6 – 1 classroom

Classrooms are large and school is in excellent condition.

There are large art, computer/resource, and special education rooms.

School has adopted STEAM curriculum which is embraced by all staff.

There is a kitchen attached to the cafeteria, however the food is prepared and transported by Northfield Elementary School for their one lunch session.

There is a library and a gym with large stage area where music classes are held.

The school is one floor and is handicap accessible.

The school does not offer a before and after school program.
The school has a principal who works part-time.

School start time is 8:40 and requires two buses to transport students to school. The Town of Warwick covers 37.64 square miles.

Warwick Community School is located approximately 8.3 miles, or 20 minutes from Northfield Elementary school.

School Attending Children Report:

<table>
<thead>
<tr>
<th>Warwick</th>
<th>Local Public Schools</th>
<th>Public Schools</th>
<th>Academic Regional Schools</th>
<th>Technical Regional Schools</th>
<th>Collaboratives</th>
<th>Charter Schools</th>
<th>Out of District Public Schools</th>
<th>In State Private and Parochial Schools</th>
<th>Home Schooled</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016-17</td>
<td>0</td>
<td>64</td>
<td>7</td>
<td>0</td>
<td>1</td>
<td>9</td>
<td>6</td>
<td>2</td>
<td>0</td>
<td>89</td>
</tr>
<tr>
<td>2015-16</td>
<td>0</td>
<td>58</td>
<td>4</td>
<td>0</td>
<td>2</td>
<td>6</td>
<td>2</td>
<td>2</td>
<td>0</td>
<td>74</td>
</tr>
<tr>
<td>2014-15</td>
<td>0</td>
<td>57</td>
<td>6</td>
<td>0</td>
<td>1</td>
<td>6</td>
<td>2</td>
<td>1</td>
<td>0</td>
<td>73</td>
</tr>
</tbody>
</table>

Approximately 72% of Warwick's student population attend Pioneer Valley Regional School District.

Students school choice out:

<table>
<thead>
<tr>
<th>DISTRICT_NAME</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warwick</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Greenfield</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orange</td>
<td></td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>6</td>
<td>4</td>
</tr>
<tr>
<td>Four Rivers Charter Public</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td></td>
</tr>
<tr>
<td>Athol-Royalston</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Gill-Montague</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>Ralph C Mahar</td>
<td>2</td>
<td>4</td>
<td>5</td>
<td>3</td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>TEC Connections Academy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>Commonwealth Virtual School District</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>7</td>
<td>8</td>
<td>9</td>
<td>8</td>
<td>16</td>
<td>15</td>
</tr>
</tbody>
</table>

The Pioneer FY19 budget lists the following costs for Warwick's Elementary School:

Principal: $47,000
Teacher in charge: $2,000
Principal Office Supply: $750
Substitutes: $7,000
Library Instructional Assistant: $9,570
Library supplies: $250
Nurse salary: $64,854
Physician salary: $200
Custodial salary: $32,739
Custodial supplies: $3,000
Fuel: $22,000
Light/power: $14,850
Water: $1,790
Telephone: $1,100
Maintenance building/equipment: $17,150
Total: $244,153

Should Warwick elementary school close, the savings would be approximately:

1. $244,153 (without consideration of unemployment payments); and,
2. Without teacher, support personnel or materials reductions which may need to move to Northfield:
   Teacher salaries: $236,784
   SN Teacher salaries: $64,361
   Classroom Instructional Assistant: $49,690
   SN Instructional Assistant: $41,606
   SN Tutor: $13,308
   Student supplies: $3,650
   Math supplies: $1,300
   ELA supplies: $800
   Science: $800
   Adjustment Counselor: $13,927
   Total: $426,226

The potential loss of revenue should school choice students choose not to remain in district, would be $135,000.

EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Warwick Elementary School</th>
<th>FY16</th>
<th>FY17</th>
<th>FY17 with $135k School Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$582,060</td>
<td>$698,187</td>
<td>$573,187</td>
</tr>
<tr>
<td>Students</td>
<td>57</td>
<td>59</td>
<td>33</td>
</tr>
<tr>
<td>Cost Per Student</td>
<td>$10,212</td>
<td>$11,834</td>
<td>$17,369</td>
</tr>
</tbody>
</table>

Warwick Community School is a large rural town where bus ride is typically 17-18 minutes for students.
Municipal Information

Warwick, a town of 762 residents (2015) with an Open Town Meeting form of government, which is administered by a three member Board of Selectmen. The FY18 tax rate is $21.64, which is the same for residential and commercial property. Residential property represents 94% of the total tax levy.

Warwick 2018 Free Cash balance was $105,138, and 2017 Stabilization balance was $103,786. There is an Override Capacity of $171,456 which drives the inability to tax the full 2.5%, so there is $122,929 in Excess Capacity. Warwick is very close to the Tax Ceiling, and therefore should exercise caution when considering override requests.

As of 2018, Warwick has 193 vacant land parcels, which represents potential growth should all parcels be buildable. However, Warwick has seen a decrease in the Single Family Parcel count from 338 parcels in 2010, to 333 in 2018.

Warwick’s education appropriation ($917,973) represents 50% of the 2017 total general budget expenditures ($1,823,502), which is a decrease from 55% in 2008 (education: $1,002,772; total general budget: $1,806,958).

Warwick’s FY19 Minimum Local Contribution for Pioneer Valley Regional School District increased $16,528 from FY18, which represents 25% of the FY19 Total New Revenue of $67,110.

Warwick is strong supporter of their schools’ capital project and maintenance needs, with recent roof replacement, drilling new well, inclusion in and energy efficiency grant with the Town of Northfield.
### Pearl Rhodes Elementary School

#### 2019-2020 Projected Combined Classes (based on current 18-19 enrollment)

<table>
<thead>
<tr>
<th>2018-2019 Grades</th>
<th>PK</th>
<th>K</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
<th>5th</th>
<th>6th</th>
<th>7th</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-2020 Grades</td>
<td>K*</td>
<td>1st</td>
<td>2nd</td>
<td>3rd</td>
<td>4th</td>
<td>5th</td>
<td>6th</td>
<td>7th</td>
<td></td>
</tr>
<tr>
<td>PRES</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td>5</td>
<td>3</td>
<td>6</td>
<td>33</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BES</td>
<td>20</td>
<td>18</td>
<td>19</td>
<td>19</td>
<td>21</td>
<td>23</td>
<td>23</td>
<td>26</td>
<td>169</td>
</tr>
<tr>
<td>Enrollment Combined</td>
<td>27</td>
<td>23</td>
<td>26</td>
<td>24</td>
<td>24</td>
<td>29</td>
<td>23</td>
<td>26</td>
<td>202</td>
</tr>
<tr>
<td>PRES Choice in total</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>6</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Grade</th>
<th>Current @ BES</th>
<th>Needed if combined</th>
<th>Est. Class size</th>
<th>Total Students in Grade</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreK</td>
<td>1 teacher</td>
<td>1 teacher</td>
<td>16</td>
<td>16-20</td>
<td>Some enroll part-time</td>
</tr>
<tr>
<td>K</td>
<td>1 teachers</td>
<td>2 teachers</td>
<td>13/14</td>
<td>27*</td>
<td>*Estimate</td>
</tr>
<tr>
<td>1st</td>
<td>1 teachers</td>
<td>2 teachers</td>
<td>11/12</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>1 teacher</td>
<td>1 teacher</td>
<td>26</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>1 teachers</td>
<td>1 teacher</td>
<td>24</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td>1 teacher</td>
<td>1 teacher</td>
<td>24</td>
<td>24</td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td>1 teacher</td>
<td>2 teachers</td>
<td>14/15</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>6th</td>
<td>1 teacher</td>
<td>1 teacher</td>
<td>23</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>Total classroom teachers at BES</td>
<td>8</td>
<td>11</td>
<td>192*</td>
<td>*Estimate</td>
<td></td>
</tr>
</tbody>
</table>

Leyden School Closure Savings Estimate:
Staff (Princ, Admin Asst., SN Teacher, Nurse, Cust, Cafe worker, Lib Asst) $147,548
Supplies $11,800
Fuel, Lights, Water, Phones, Maint of Bldg/equip $36,120
Savings estimated $195,468
## Summary 454 Def

<table>
<thead>
<tr>
<th>Pioneer Valley Regional School District</th>
<th>FY20 Projections</th>
<th>Leyden only Closed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FY18</td>
<td>Revised</td>
</tr>
<tr>
<td>Town Assessments</td>
<td>9,913,690</td>
<td>9,205,774</td>
</tr>
<tr>
<td>State Aid</td>
<td>4,128,981</td>
<td>4,149,941</td>
</tr>
<tr>
<td>Chapter 70</td>
<td>358,892</td>
<td>580,981</td>
</tr>
<tr>
<td>Transportation</td>
<td>102,994</td>
<td>22,010</td>
</tr>
<tr>
<td>Charter School Reimbursement</td>
<td>66,770</td>
<td>67,000</td>
</tr>
<tr>
<td>Local Revenue</td>
<td>248,989</td>
<td>190,179</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>3,049</td>
<td>2,000</td>
</tr>
<tr>
<td>Interest Income</td>
<td>15,004</td>
<td>15,004</td>
</tr>
<tr>
<td>Total Sources of Funds</td>
<td>14,015,200</td>
<td>14,223,865</td>
</tr>
</tbody>
</table>

### 10 yr Note

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18</th>
<th>Revised</th>
<th>FY20</th>
<th>Projected</th>
<th>FY21</th>
<th>Projected</th>
<th>FY22</th>
<th>Projected</th>
<th>FY23</th>
<th>Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>3,744,587</td>
<td>4,273,040</td>
<td>4,697,382</td>
<td>4,723,523</td>
<td>4,694,549</td>
<td>5,247,869</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bernardston</td>
<td>1,355,509</td>
<td>1,230,709</td>
<td>1,362,245</td>
<td>1,295,034</td>
<td>1,434,030</td>
<td>1,471,051</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leyden</td>
<td>309,192</td>
<td>455,507</td>
<td>469,240</td>
<td>477,281</td>
<td>488,635</td>
<td>500,307</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield</td>
<td>1,502,183</td>
<td>1,461,763</td>
<td>1,490,392</td>
<td>1,538,397</td>
<td>1,571,897</td>
<td>1,616,431</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warwick</td>
<td>796,240</td>
<td>650,379</td>
<td>667,158</td>
<td>684,388</td>
<td>702,082</td>
<td>720,253</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,035</td>
<td>1,334,586</td>
<td>1,375,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,451,646</td>
<td>1,496,189</td>
<td>1,535,644</td>
<td>1,574,035</td>
<td>1,613,386</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>13,999,149</td>
<td>14,223,866</td>
<td>14,707,259</td>
<td>15,191,834</td>
<td>15,732,341</td>
<td>16,262,246</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variance</td>
<td>15,111</td>
<td>-1</td>
<td>-341,424</td>
<td>-385,369</td>
<td>-687,820</td>
<td>-1,133,323</td>
<td>-2,947,936</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leyden Closure</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>800,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>W/O Warwick closed</td>
<td>-141,424</td>
<td>-385,369</td>
<td>-687,820</td>
<td>-933,323</td>
<td>-2,147,936</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### FY20 Changes/Extra Budget Capacity

- **-141,424**
- **Extra SPED Tuition Capacity due to 0 CB deficit**
- **-2,147,936**
- **Decrease in Lunch Subsidy**
- **-100,568**
- **203% Estimated Surplus/Deficit (GAP in Revenue/Expenses)**

### Scenarios

- **-70,424**
- **2.5% Estimated Surplus/Deficit (GAP in Revenue/Expenses)**
- **-185,496**
- **122% Estimated Surplus/Deficit (GAP in Revenue/Expenses)**
- **-110,568**
- **203% Estimated Surplus/Deficit (GAP in Revenue/Expenses)**

### Syr Note

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18</th>
<th>Revised</th>
<th>FY20</th>
<th>Projected</th>
<th>FY21</th>
<th>Projected</th>
<th>FY22</th>
<th>Projected</th>
<th>FY23</th>
<th>Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>3,744,587</td>
<td>4,273,040</td>
<td>4,566,850</td>
<td>4,768,559</td>
<td>5,057,701</td>
<td>5,309,438</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bernardston</td>
<td>1,335,909</td>
<td>1,328,789</td>
<td>1,392,645</td>
<td>1,398,344</td>
<td>1,434,060</td>
<td>1,471,051</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leyden</td>
<td>509,190</td>
<td>455,507</td>
<td>469,240</td>
<td>477,281</td>
<td>488,635</td>
<td>500,307</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Northfield</td>
<td>1,502,183</td>
<td>1,461,763</td>
<td>1,490,392</td>
<td>1,538,397</td>
<td>1,571,897</td>
<td>1,616,431</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warwick</td>
<td>796,240</td>
<td>650,379</td>
<td>667,158</td>
<td>684,388</td>
<td>702,082</td>
<td>720,253</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,035</td>
<td>1,334,586</td>
<td>1,375,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,451,646</td>
<td>1,496,189</td>
<td>1,535,644</td>
<td>1,574,035</td>
<td>1,613,386</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>13,999,149</td>
<td>14,223,866</td>
<td>14,771,548</td>
<td>15,258,670</td>
<td>15,795,457</td>
<td>16,322,985</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Variance</td>
<td>15,111</td>
<td>-1</td>
<td>-345,424</td>
<td>-450,405</td>
<td>-760,975</td>
<td>-996,066</td>
<td>-1,033,995</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leyden Closure</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>200,000</td>
<td>800,000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>W/O Warwick closed</td>
<td>-230,949</td>
<td>-450,405</td>
<td>-760,975</td>
<td>-996,066</td>
<td>-1,033,995</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Net Shortfall: **-230,949**

Increased cuts for 5 year financing: **-96,825**

-56,036**

-43,165 **

-61,743

-285,458
## Pioneeer Valley Regional School District
### FY20 Projections
#### Leyden and Warwick Closed

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18 Actual</th>
<th>Revised Budgeted</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
<th>Cumulative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town Assessments</td>
<td>6,913,636</td>
<td>6,205,774</td>
<td>6,403,816</td>
<td>6,071,816</td>
<td>6,913,612</td>
<td>10,161,182</td>
<td>230,144</td>
</tr>
<tr>
<td>State Aid</td>
<td>141,971</td>
<td>141,971</td>
<td>2.5% increase</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chapter 70</td>
<td>4,128,881</td>
<td>4,149,941</td>
<td>4,174,182</td>
<td>4,199,423</td>
<td>4,222,664</td>
<td>4,246,905</td>
<td>292,084</td>
</tr>
<tr>
<td>Transportation</td>
<td>535,882</td>
<td>580,961</td>
<td>480,046</td>
<td>480,772</td>
<td>492,792</td>
<td>505,111</td>
<td>95,328</td>
</tr>
<tr>
<td>Charter School Reimbursement</td>
<td>102,994</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>22,010</td>
<td>0.98%</td>
</tr>
<tr>
<td>Medicaid</td>
<td>66,770</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>67,000</td>
<td>0.98%</td>
</tr>
<tr>
<td>Local Revenue</td>
<td>246,899</td>
<td>196,179</td>
<td>195,179</td>
<td>184,904</td>
<td>124,944</td>
<td>124,944</td>
<td>26,898</td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td>2,010</td>
<td>2,010</td>
<td>2,010</td>
<td>2,010</td>
<td>2,010</td>
<td>2,010</td>
<td>2.06%</td>
</tr>
<tr>
<td>Interest Income</td>
<td>3,049</td>
<td>2,000</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>1,500</td>
<td>9,395,774</td>
</tr>
<tr>
<td>Other</td>
<td>15,004</td>
<td>15,004</td>
<td>15,004</td>
<td>15,004</td>
<td>15,004</td>
<td>15,004</td>
<td>15,004</td>
</tr>
</tbody>
</table>

**Total Sources of Funds:** 14,015,260

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18 Actual</th>
<th>Revised Budgeted</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>2,744,882</td>
<td>4,273,040</td>
<td>4,501,362</td>
<td>4,723,523</td>
<td>4,994,548</td>
<td>5,247,933</td>
</tr>
<tr>
<td>Barnstable</td>
<td>1,535,509</td>
<td>1,328,769</td>
<td>1,328,945</td>
<td>1,328,945</td>
<td>1,328,945</td>
<td>1,328,945</td>
</tr>
<tr>
<td>Leyden</td>
<td>509,190</td>
<td>455,507</td>
<td>485,240</td>
<td>477,281</td>
<td>488,630</td>
<td>500,307</td>
</tr>
<tr>
<td>Northfield</td>
<td>1,562,183</td>
<td>1,499,382</td>
<td>1,538,027</td>
<td>1,577,897</td>
<td>1,618,431</td>
<td>1,659,968</td>
</tr>
<tr>
<td>Wachusett</td>
<td>796,240</td>
<td>650,379</td>
<td>657,126</td>
<td>654,308</td>
<td>702,082</td>
<td>720,253</td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,035</td>
<td>1,334,856</td>
<td>1,367,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,461,648</td>
<td>1,498,189</td>
<td>1,535,844</td>
<td>1,574,035</td>
<td>1,613,386</td>
</tr>
</tbody>
</table>

**Total:** 13,999,149

| Variance | 16,111 | -1 | -341,424 | -685,369 | -887,820 | -1,133,333 | -2,987,936 |
| Leyden Closure | 200,000 | 200,000 | 200,000 | 200,000 | 200,000 | 200,000 |
| WO Warwick closed | -141,424 | -385,369 | -887,820 | -933,333 | -2,147,936 | |
| Warwick Closure Est | 214,152 | 214,152 | 214,152 | 214,152 | 214,152 | 214,152 |
| N Orthfall | 52,728 | -717,217 | -473,668 | -719,171 | -1,291,328 | |

**FY4 Extra Budget Capacity:** 46,000

**Extra SPED Tuition Capacity due to 0 CR deficit**

**Decrease in Lunch Subsidy:** 25,000

<table>
<thead>
<tr>
<th>Scenarios</th>
<th>FY18 Actual</th>
<th>Revised Budgeted</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>143,725</td>
<td>2.06% Estimated Surplus/Deficit (GAP in Revenue/Expenses)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>28,665</td>
<td>1.25% Estimated Surplus/Deficit (GAP in Revenue/Expenses)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>103,584</td>
<td>2.06% Estimated Surplus/Deficit (GAP in Revenue/Expenses)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Uses of Funds</th>
<th>FY18 Actual</th>
<th>Revised Budgeted</th>
<th>FY20 Projected</th>
<th>FY21 Projected</th>
<th>FY22 Projected</th>
<th>FY23 Projected</th>
</tr>
</thead>
<tbody>
<tr>
<td>District Administration</td>
<td>3,744,567</td>
<td>4,273,040</td>
<td>4,501,362</td>
<td>4,723,523</td>
<td>4,994,548</td>
<td>5,247,933</td>
</tr>
<tr>
<td>Barnstable</td>
<td>1,335,509</td>
<td>1,328,769</td>
<td>1,328,945</td>
<td>1,328,945</td>
<td>1,328,945</td>
<td>1,328,945</td>
</tr>
<tr>
<td>Leyden</td>
<td>509,190</td>
<td>455,507</td>
<td>485,240</td>
<td>477,281</td>
<td>488,630</td>
<td>500,307</td>
</tr>
<tr>
<td>Northfield</td>
<td>1,562,183</td>
<td>1,499,382</td>
<td>1,538,027</td>
<td>1,577,897</td>
<td>1,618,431</td>
<td>1,659,968</td>
</tr>
<tr>
<td>Wachusett</td>
<td>796,240</td>
<td>650,379</td>
<td>657,126</td>
<td>654,308</td>
<td>702,082</td>
<td>720,253</td>
</tr>
<tr>
<td>Shared Staff</td>
<td>1,523,277</td>
<td>1,302,035</td>
<td>1,334,856</td>
<td>1,367,951</td>
<td>1,402,149</td>
<td>1,437,203</td>
</tr>
<tr>
<td>SPED</td>
<td>1,184,915</td>
<td>1,461,648</td>
<td>1,498,189</td>
<td>1,535,844</td>
<td>1,574,035</td>
<td>1,613,386</td>
</tr>
</tbody>
</table>

**Total:** 13,999,149

| Variance | 16,111 | -1 | -346,849 | -650,405 | -950,975 | -1,195,096 | -3,233,395 |
| Leyden Closure | 200,000 | 200,000 | 200,000 | 200,000 | 200,000 | 200,000 |
| WO Warwick closed | -236,849 | -650,405 | -950,975 | -996,068 | -2,433,395 | |
| Warwick Closure Est | 214,152 | 214,152 | 214,152 | 214,152 | 214,152 | 214,152 |
| Net Shortfall | -22,727 | -236,245 | -950,975 | -780,914 | -1,676,787 | |

**Increased cuts for 5 year financing:** -95,525 -95,036 -93,155 -51,743 -288,458
### 2019-2020 Projected Combined Classes
(based on current 18-19 enrollment)

<table>
<thead>
<tr>
<th>2018-2019 Grades</th>
<th>PK</th>
<th>K</th>
<th>1st</th>
<th>2nd</th>
<th>3rd</th>
<th>4th</th>
<th>5th</th>
<th>6th</th>
<th>7th</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-2020 Grades</td>
<td>K*</td>
<td>1st</td>
<td>2nd</td>
<td>3rd</td>
<td>4th</td>
<td>5th</td>
<td>6th</td>
<td>7th</td>
<td></td>
</tr>
<tr>
<td>WCS</td>
<td>3</td>
<td>7</td>
<td>12</td>
<td>10</td>
<td>6</td>
<td>10</td>
<td>5</td>
<td>10</td>
<td>63</td>
</tr>
<tr>
<td>NES</td>
<td>19</td>
<td>24</td>
<td>24</td>
<td>22</td>
<td>27</td>
<td>24</td>
<td>21</td>
<td>25</td>
<td>186</td>
</tr>
<tr>
<td>Enrollment Combined</td>
<td>22</td>
<td>31</td>
<td>36</td>
<td>32</td>
<td>33</td>
<td>34</td>
<td>26</td>
<td>35</td>
<td>249</td>
</tr>
<tr>
<td>WCS Choice</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>1</td>
<td>6</td>
<td>2</td>
<td>4</td>
<td>28</td>
</tr>
<tr>
<td>Enrollment Combined</td>
<td>20</td>
<td>28</td>
<td>33</td>
<td>25</td>
<td>32</td>
<td>28</td>
<td>24</td>
<td>31</td>
<td>221</td>
</tr>
</tbody>
</table>

*Note this doesn't take into account Warwick students that would not come to NES (choice out)*

<table>
<thead>
<tr>
<th></th>
<th>Current @ NES</th>
<th>Needed if combined</th>
<th>Est. Class size</th>
<th>Total Students in Grade</th>
<th>Some enroll part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>PreK</td>
<td>1 teacher</td>
<td>1 teacher</td>
<td>16</td>
<td>16-20</td>
<td>Some enroll part-time</td>
</tr>
<tr>
<td>K</td>
<td>2 teachers</td>
<td>2 teachers</td>
<td>12/12</td>
<td>24*</td>
<td>*Estimate</td>
</tr>
<tr>
<td>1st</td>
<td>2 teachers</td>
<td>2 teachers</td>
<td>15/16</td>
<td>31</td>
<td></td>
</tr>
<tr>
<td>2nd</td>
<td>1 teacher</td>
<td>2 teachers</td>
<td>18/18</td>
<td>36</td>
<td></td>
</tr>
<tr>
<td>3rd</td>
<td>2 teachers</td>
<td>2 teachers</td>
<td>16/16</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>4th</td>
<td>1 teacher</td>
<td>2 teachers</td>
<td>16/17</td>
<td>33</td>
<td></td>
</tr>
<tr>
<td>5th</td>
<td>1 teacher</td>
<td>2 teachers</td>
<td>17/17</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>6th</td>
<td>1 teacher</td>
<td>2 teachers</td>
<td>13/13</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Total classroom teachers at NES</td>
<td>11</td>
<td>15</td>
<td>232*</td>
<td>*Estimate</td>
<td></td>
</tr>
</tbody>
</table>

**Warwick School Closure Savings Estimate:**

- **Staff (Principal, Nurse, SN Tutor, Custodian, IA, Lib Asst):** $157,362
- **Fuel, Lights, Water, Phones, Maint of Bldg/equip:** $56,790

**Total:** $214,152
**Transportation** – Regional transportation including SPED, needs advocacy (w/Gill-Montague?)
- District wide transportation
- 100% transportation busing
- Full regional transportation (SPED too)
- Special Ed transportation costs, one company
- SPED transportation, one provider too expensive
- Stop spinning our wheels

**Technology**
- Institute distance learning in some subject areas, it isn’t useful in some areas, excellent in others
- State funding for technology, 1 to 1 initiative for Franklin County middle schools to high school
- Broadband
- Synching schedules
- Website for Superintendent/Business Manager, RE: FTE

**Resource Collaboration** – shared services/regionalization
- Reach out for Andy Myers and the Gateway Hilltown Collaborative and learn about their promising school/municipal discussions/initiatives (RB Holzman, 413-354-6585)
- Focus on program collaboration and innovation that could attract families which requires creative thinking and marketing (RB Holzman, 413-354-6585)
- $5,000 for students choosing into districts is a problem
- Regionalize Pre-K – 6 south county
- Shared services
- Unite with districts on the Cape
- Centralized office of shared services in Franklin County (admins, office staffing, etc.)
- Town Meetings on Chapter 70 formula
- Smaller school committees that “stick to their knitting” set policy and budget and let management manage
- Allow student duty to eliminate custodial staff
- Sharing services with Towns, move out our school, think bigger
- Move 6th grade to Pioneer
- Specialized Regional Schools
- Cultural Factors – coming from experience in Lane County (Oregon) the greatest obstacle here is cultural rather than economical (it’s not just $$)
- Sync schedules between Districts to allow distance learning
- All School Committees should join Mass Rural School Coalition
- Local elementary schools in a super union, tuition to competing Jr./Sr. high school
**State Ed. Reform/Financial Efficiencies** – Chapter 70 formula changes, Healthcare

- Rural Magnet Schools, centralize human financial and program resources to achieve critical mass, too many silos!
- Urban/Suburban/Rural student exchange programs
- Eliminate MCAS enslavement
- Forecast forward vision of data on enrollment and cost
- Problem is financial! Need more local aid, state and federal (our towns cannot continue as they are now)
- Charter school funding
- Fund or eliminate unfunded mandates
- Fund rural education network
- Get state resources more involved in planning process
- Sparsity aid, DESE regulations
- Items mentioned by Stan R. must be pushed
- State guaranteed minimum budget for each district that increases with inflation
- Return on investment of initial reports
- Help get fair share passed in Nov!
- Use language that fits legislation
- Re-examine/redefine local control that will build expanded communities of interest (RB Holzman)
- Reopen Chapter 70 formula
- Federal funds
- Change Chapter 70 formula, density factor cost for rural schools
- MassHealth type expansion of health insurance to school district employees and municipal employees
- LOVE the shared services concept
- Platform for action? Chapter 70 formula
- Change education formula
- DESE – tools to use to project savings from different school models
- Change Chapter 70 formula to factor in % of Town ȷ goes to pay for school (so to create an equalizing funding factor)
- Children placed by DCF in our communities: we pay SPED costs, sending town gets reimbursement
- Which legislators do we need to get to in order to get the state formula changed?
- Urban/rural coalition for Chapter 70 formula
- Circuit Breaker funding

**Teachers**

- Keep teachers, cut administrators
- State supported distance learning programs for advanced/priority/specialized classes/programs. Not just online courses, these would be actively led by qualified teachers, create efficient capacity to educate effectively.
- More virtual classrooms
- Allow more self-directed study
- Allow the hiring of adjuncts
Amending the Pioneer Valley RSD Regional Agreement to HEART Committee Regional School Committee 3/6/19
What is a Regional Agreement?

* Describes how a regional school district functions

and

* Describes how the district & the member towns intersect legally and financially
Included in Regional Agreements - 1

* Type of School District
* Functions & Responsibilities of School Committee
* Who are the Students in the District?
* Location & Lease of the schools
* How is the Budget Built and Approved?
* How are the Assessments Apportioned to Towns?
* How does the District Incur Debt?
Included in Regional Agreements - 2

* Who is Responsible for Student Transportation?
* How is this Regional Agreement Amended?
* How can New Towns be Included in the District?
* How can Member Towns Withdraw from the District?
* How & When Does the Regional Agreement get Reviewed?
Why is an Update Needed?

* Original Regional Agreement – 1991

* Amended in 1999

* Original Agreement approved prior to 1993 Education Reform Act
HEART Committee Reviewed
Current Regional Agreement

A) Update to current reality – RSC:
  * Policies
  * Practices
  * Issues

B) Conform to Ed Reform Act & Amended Laws

C) Conform to DESE Regulations
* Add 13th School Committee (RSC) member
* Require Chair and Vice Chair of RSC to be rotated every 2 years
* RSC members may not serve more than 2 consecutive terms
* Vacancy on RSC appointed by Selectboard & remaining RSC members from that town
* RSC responsible for which grades are in which schools
* 10-month/5 year feasibility study required before a school can be closed – ad hoc committee
* District required to pay maintenance expenses for up to 3 years if school closed
* Town in which its only school is closed does not have to pay capital expenses in school where students go
* Budget process language updated but not changed
* Assessment language updated but not changed
* Incurring of debt language updated but not changed
* “Capital” redefined to “include building modifications to the structure and systems that exceed $10,000”
* RSC must approve any “special funds” raised by a town
* There is new language clarifying how a new town can become a member of the District
* There is updated language to clarify the process & responsibilities of a town seeking to withdraw from the District

* A new section requires the RSC to review the Regional Agreement every 5 years
* HEART Committee includes representatives of all 4 towns

* Heart Committee includes members of the RSC, Selectbds, FinComs & citizens

* HEART meetings open to public – newspaper coverage
* HEART Committee voted to approve amended Regional Agreement (2/13/19)
* RSC votes final version
* Proposed amended Regional Agreement reviewed by DESE, District & Town Counsels
* Selectboards place article on warrant
* Voters approve or disapprove amended Regional Agreement
Approval Process - 2

* If approved by 2/3 of towns (i.e., 3), signed Agreement & certified votes sent to DESE

* DESE Commissioner approves amended Agreement provided it is in compliance
HEART Committee Members

HEART/Regional Agreement Amendment Committee
* Julia Blyth – Northfield Selectboard
* Alan Genovese - Warwick Citizen
* Cheryl George – Northfield PTO Chair
* Michele Giarusso – Leyden Town Coordinator
  * Robert Keir – Bernardston Citizen
* Jess Marshall - Warwick School Committee
  * Tony Mateo – Northfield FinCom
* Sue O’Reilly-McRae – Warwick School Committee
  * Jean Page – Bernardston Citizen
  * Shilee Pratt – Bernardston Citizen
  * Ginger Robinson – Leyden FinCom
  * Tom Wyatt – Warwick Citizen

MARS CONSULTANTS
(MA Association of Regional Schools)
* Steve Hemman
  * Mac Reid
[Additional language in red.]

[Language to be deleted is in blue with strikethrough.]

[Wording changes based on discussion at the last meeting are highlighted in yellow.]

[Wording changes based on comments/suggestions from DESE are highlighted in blue.]

February 18, 2019

PIONEER VALLEY REGIONAL SCHOOL DISTRICT AGREEMENT

The Agreement entered into pursuant to Chapter 71 of the General Laws of Massachusetts (hereinafter referred to as "MGL"), as amended, among the Towns of Bernardston, Leyden, Northfield and Warwick, (hereinafter referred to as "member towns"), establishing the Pioneer Valley Regional School District (hereinafter referred to as the "District") is hereby further amended in its entirety to read as hereinafter set forth. This amended Agreement will go into effect on ________________.

In consideration of the mutual promises herein contained, IT IS HEREBY AGREED AS FOLLOWS:

SECTION II

Type of Regional School District

(A) The District shall include all grades from Pre-kindergarten through grade twelve (PK – 12), inclusive.

(B) The Regional School District Committee (hereinafter referred to as the "Committee") shall also have the right to establish adult evening education courses.

(C) The Committee is hereby authorized, in its discretion to establish and maintain state-aided vocational education, acting as trustees therefore in accordance with the
provisions of MGL, Chapter 74 of the General Laws and any acts amendatory thereof, in additional thereto or dependent thereon and any other special educational classes in accordance with the provisions of any other general or special law related thereto.

SECTION I

The Regional School District Committee

(A) Powers, Duties and Composition

1

1

1

1

1

(1) The powers and duties of the District shall be vested in and exercised by a regional school district Committee. The Committee shall consist of twelve thirteen (13) members, three members from each member town and one member elected at large from one of the four (4) member towns who receives the most votes from all member towns. All at-large candidates will register in their town of residence to be placed on the common ballot for all member towns.

(2) A majority of the members of the Committee shall constitute a quorum, but a lesser number may adjourn.

(3) The Committee shall have all the powers and duties conferred and imposed upon school committees by law and conferred and imposed by this Agreement, and such other additional powers and duties as are specified in MGL, Chapter 71, Sections 16 to 16I, inclusive, as amended, of Chapter 71 of the General Laws and any amendments thereof of additions thereto now or hereafter enacted, or as may be specified in any other applicable general or special law.

(4) At the first regular meeting of the Committee following the 1992 District election and thereafter at At the first regular meeting to be held after the conclusion of the each District election, the Committee shall organize and choose by ballot a Chairperson and a Vice Chairperson from its own membership. The Chairperson and Vice Chairperson positions shall be rotated among Committee members every two (2) years. from each member town every two years in a rotating sequence. At the same meeting, or at any other meeting, the Committee
shall appoint a Treasurer and Secretary, who may be the same person but who need not be members of the Committee, fix the time and place for its regular meetings and provide for the calling of special District meetings. The Chairperson will appoint members to serve on subcommittees. annually

(B) Initial Committee

(1) The members of the Committee in office on July 1, 1991 shall continue to serve until the District election to be held in 1992. Vacancies occurring until that date shall be filled in accordance with Subsection I (D).

(B) Elections

(1) Each Committee member shall be entitled to one vote at all Committee meetings. In compliance with the Supreme Court’s “one person, one vote” principle, members will be elected in district-wide, at-large elections, with members required to be residents of specific communities such that the total number of Committee members remains at twelve will be thirteen (13) with three (3) members from each member town and one (1) member-at-large.

(2) At every District election, except the 1992 District election, there shall be elected to membership on the Committee for terms of four years, or for any

2

unexpired term as outlined in Subsection I II (C), such persons as shall maintain the Committee at twelve thirteen (13) members and preserve the residency requirements as stated in Subsection I II (A) (1) of this section.

(3) At the 1992 District election, twelve members – the entire committee will be elected, with residency requirements as stated above. The Towns of Bernardston and Leyden will each have two members for two years and one for four years. The Towns of Northfield and Warwick will each have two members elected for four years and one member elected for two years. In the Towns of Bernardston and Leyden, the successful candidate receiving the greatest number of votes shall fill the four-year term on the Committee. In the Towns of Northfield and Warwick, the successful candidate receiving the fewest votes shall fill the two-year term on the Committee. Subsequent annual elections will be for terms
of four years only, except in cases involving unexpired terms.

(3) No Committee member shall serve more than two (2) consecutive four-year terms. Committee members who have served for two (2) consecutive terms may fill a vacancy during the two (2) consecutive years after the end of their second consecutive term. Filling a vacancy will not be considered the first year of a new term of office.

(4) The District election shall be held at the biennial state election, normally on the Tuesday next after the first Monday in November of every even numbered year. District elections shall be conducted in accordance with the Massachusetts General Laws.

(C) Vacancies

A vacancy occurs when a person resigns, moves out of the member town, or dies. Vacancies that occur on the Committee shall be filled by appointment of the moderator of the member town in which the vacancy occurs, Selectboard (“Selectmen” hereinafter referred to as “Selectboard”) and the remaining Committee members (without the Committee member-at-large) from the town concerned, acting jointly by a two-thirds (2/3) vote, to serve until the next District election, at which time a successor shall be elected to serve for the balance of the unexpired term. A vacancy in the member-at-large position will be filled, as above, by the Selectboard of the member town in which the member-at-large was a resident and the Committee members from that town.

SECTION III

Pupils
Students

(A) Residents of the member towns in grades six or seven through twelve (6 or 7 – 12) will attend school at the Pioneer Valley Regional Junior/Senior High School, presently located off Route 10 in Northfield, Massachusetts.

(A) Students who reside in the member towns will attend schools in grade levels according to Committee policy. A school will not be closed permanently without going
through the process outlined in Section IV (C).

(B) Subject to the provisions of this section, it is intended that all residents of the member towns in grades pre-kindergarten to five or six (PK – 5 or 6), inclusive, will normally receive their education in facilities located in their respective towns, except as hereinafter provided.

(B) Pupils Students with special needs, disabilities receiving services with an approved Individualized Plan under the provisions of Chapter 71B of the General Laws, MGL, Chapter 71-B, as amended, shall attend schools as designated recommended by the Special Education Administrator and approved by the Superintendent. by the Committee.

(2) Students may also be accommodated in other elementary schools within the District when recommended by the Superintendent and approved by the Committee, both the child’s parents and the School Committee provided that the Committee determines that such a reassignment is prudent and can be accomplished and is in the best interest of the pupil. A school will not be closed permanently without going through the process outlined in Section IV (C).

(C) Residents of member towns in grades kindergarten to six (K – 6), inclusive, may be reassigned to schools outside of their respective towns when, in the judgment of the Committee, there is a temporary need to reassign pupils when damage to a physical plant renders a facility unusable, in whole or in part, for its intendent purposes.

(C) Students residing outside the District may attend the District’s schools, with the approval of the Committee, provided that adequate facilities for such pupils students are available and upon the appropriate payment of tuition as recommended by the Superintendent and approved by the Committee. established in accordance with the provisions of law. Including School Choice students is at the discretion of the Committee and is subject to the regulations promulgated by DESE.

(D) Students of the District wishing to attend vocational schools may do so in the manner provided by law. MGL, Chapter 74, as amended.

SECTION V IV

Location and Lease of the Present Member Town
Schools

(A) All schools which are part of the District shall be located in member towns. Any new schools constructed within the District shall be located at a site or sites within the member towns, and determined by the Committee.

(B) Leases

(1) The District shall lease from each member town the building, facilities and grounds for all elementary schools operating as a school in the District, included in the list below. The District shall enter into written leases of the elementary schools, which shall include contracts for services. Each lease shall be for a term of not to exceed twenty (20) years. The leases may contain provisions for an extension in accordance with the provisions of MGL, Chapter 71, Section 14C Section 14C of Chapter 71 of the Massachusetts General Laws, as amended. The member towns Towns of Bernardston, Leyden, Northfield and Warwick shall receive no rental for the leases. The District shall administer all expenses for maintaining and operating such buildings, facilities and grounds and keeping them in good repair during the terms of the leases.

  Bernardston Elementary
  School School Road
  Bernardston

  Leyden Elementary
  School Brattleboro Road
  Leyden

  Northfield Elementary School
  Main Street Northfield

  Warwick Elementary School
  22 Orange Road Warwick

(2) Nothing contained in the leases shall prevent the Committee from permitting the use of the building, facilities, and grounds by the member towns. Each lease involving a member town shall be on such other terms
as may be determined by the Selectmen Selectboard thereof and the Committee, who shall together execute the leasing agreement on behalf of the town owning the building, for the member town and the District, respectively.

(3) The District shall insure, at its expense, the buildings, facilities, and grounds so leased. Details of such insurance shall be determined after consultation with the Selectboard those empowered to sign the leasing agreement on behalf of the town owning the building(s).

(D) Capital costs shall include all expenses, in the nature of capital outlay such as expenses for which the District is authorized to incur debt under the provisions of Section 16(d) of Chapter 71 of the General Laws, and acts in building(s).

(C) Process To Close A School

(1) A vote by the Committee to begin the study must be taken at least ten (10) months prior to its vote to close a school and must pass with a two-thirds (2/3) majority. Under extraordinary circumstances, this timeline may be modified by a two-thirds (2/3) majority vote of the Committee with representatives from at least three (3) towns voting to support the modified timeline.

(2) Closure of any school within the District shall not be done without the District’s Central Office Administrators conducting a five-year projected feasibility study [see (a) – (e)] conducted initiated at least ten (10) months in advance of the proposed closing, to include the educational impact on students. Under extraordinary circumstances, this timeline may be modified by a majority vote of the Committee with representatives from at least three (3) towns voting to support the modified timeline.

(a) A study of the educational impact on students.

(b) A complete fiscal analysis to determine the cost savings, the impact on the regional budget, and the individual assessments to the member towns.
(c) A review of the educational reorganizational schemes and administrative structure and their its financial impact.

(d) A review of population trends to determine the long-term impact of the closing.

(e) A process in which the Committee sets up an ad hoc committee to review the feasibility and make recommendations to the School Committee which includes: one (1) member from each member town appointed by the Committee; and two (2) members from each member town appointed by the respective Selectboards, a member of the Selectboard, among others, of each member town. the Selectboard of the town affected by the school being studied for closing. The School Committee shall give any such ad hoc committee’s recommendations due consideration, but may exercise its discretion as to whether or not it will implement any of the group’s recommendations.

(f) A quorum of the School Committee will hold a public forum with two (2) weeks' notice hearing in the member town where the school is being proposed to be closed prior to the vote of the Committee.

(3) A school may then be closed at the first June 30-after the Committee vote.

(4) A vote by the Committee to close the school shall require a two-thirds (2/3) majority vote of the Committee with representatives from at least three (3) towns voting to support closure. The vote shall be held at a regularly scheduled Committee meeting.

(5) After the conclusion of the above process, Closure of a school is defined as no longer assigning District students to that particular school. The town affected by the Committee vote still maintains control and ownership of the facility and may utilize the facility as it sees fit.

(6) The District will pay, in each of three (3) years, the same amount to the
Town in which a town-owned elementary school is being closed, 50% of the budgeted costs to maintain a fully functioning school, in the fiscal year in which the Committee votes to close a school in the following categories: fuel, light/power/water, telephone, maintenance of grounds supplies, maintenance of buildings C/S, maintenance of building supplies, maintenance of equipment C/S, maintenance of equipment supplies, and insurance. District payments to the member town will be made by the end of the following months: August; November; January; and April. Beginning with the July 1 immediately after the school is closed, the lease for that school will be terminated and the District will have no further financial or other responsibility for the building and grounds.

The member town in which its only school is closed will receive, beginning in the first fiscal year of its closure, up to $15,000 per year for up to three (3) years as compensation for that town to maintain that building until it is repurposed. If the closed building is repurposed prior to the end of this three-year period, the District will no longer be responsible for this compensation.

SECTION VII V

Budget

(A) Budget

The Committee shall annually determine the District’s budget consistent with the timelines, terms and requirements of MGL, Chapter 71, Section 16B, as amended, and other pertinent provisions of law and consistent with regulations promulgated by the Department of Elementary and Secondary Education (hereinafter referred to as “DESE”).

(B) Public Budget Hearing and Budget Approval

(1) After conducting a public hearing consistent with MGL, Chapter 71, Section 38N, as amended, the Committee, by a minimum two-thirds (2/3) vote of all its members, shall annually approve a an operating budget for the next fiscal year to maintain and operate the District. After deducting the amount of aid the
District is to receive, the balance shall be apportioned among the member towns in accordance with Section VI.

(2) The budget will be itemized in such detail as the Committee may deem advisable. Such budget shall be adopted not later than forty-five (45) days prior to the earliest date on which the business session of the annual town meeting of any member town is to be held, but in no event later than March 31, provided that said budget need not be adopted earlier than February 1. The amounts so apportioned for each member town shall be certified by the District Treasurer to the Treasurers of the member towns within thirty (30) days from the date on which the annual operating budget is adopted by the Committee.

(3) The annual budget as adopted by a two-thirds (2/3) vote of the Committee, must be approved by a simple majority vote at two-thirds (2/3) of the member town meetings.

(4) The Committee shall on or before February 15 of each year submit an annual report to each of the member towns, containing a detailed financial statement, and a statement showing the method by which the annual charges assessed against each town were computed, together with such additional information relating to the operation and maintenance of the regional school District as may be deemed necessary by the Committee or by the Selectmen Selectboard of any member town and each member town shall include said report in its annual report.

(5) Amendments to the Approved Budget [CMR 41.05 (5), as amended]

(a) A regional school committee may propose, with a two-thirds vote, an amendment to a previously approved budget if such amendment results in an increase in the total amount of the budget or an increase in assessment for any member, such amendment shall be submitted to the local appropriating authorities for their approval. The treasurer of the regional school district shall submit the proposed amendment to the members within 7 days from the date of the regional school committee vote. The local appropriating authority of every member shall have 45 days from the date of
the regional school committee's vote to meet and consider the amendment. The proposed amendment shall be effective if it is approved by two-thirds of the local appropriating authorities and by the local appropriating authority of any member whose assessment is increased.

(b) If a local appropriating authority does not vote on the proposed amendment within the 45-day period and that local appropriating authority has previously appropriated funds for its assessment in an amount greater than or equal to the member's assessment for the amended budget, that member shall be deemed to have approved the amended budget.

(c) If a proposed amendment to a previously approved budget does not increase the total amount of the budget and reduces or leaves unchanged the

8

assessment for every member, the amendment shall not require approval by the local appropriating authorities and shall be effective upon a two-thirds vote of the regional school committee.

SECTION VI

Apportionment and Payment of Costs Incurred by the District

(A) Classification of Costs

For the purpose of apportioning assessments by the District to the member towns, costs shall be divided into four (4) categories: operating costs, capital costs, debt, and transportation costs. The Committee shall determine the amount necessary to meet the annual operating, capital, debt, and transportation needs and shall allocate such amount among the member towns.

(B) Operating Costs

(1) Operating costs shall include all costs except capital, debt, and transportation costs but shall include interest on temporary notes issued by the District in anticipation of revenue.
(2) Apportionment of Operating Costs

The total operating costs assessed to each member town will consist of the member town’s Minimum Local Contribution and the town’s share of Above Minimum Local Contribution.

The aggregate Above Minimum Contribution is arrived at by subtracting from the Operating Budget the following: Chapter 70 aid, the Minimum Required Combined Local Contributions of all member towns, and other general revenue sources to the District. [Or as may be modified by DESE from time to time.] This formula is illustrated below:

Operating Budget (which excludes capital, debt, and transportation) - (minus) Chapter 70 aid (as calculated by DESE) - (minus) Minimum Required Combined Local Contributions of all member towns (as calculated by DESE) - (minus) Other general revenue sources to the District = (equals) Total Above Minimum Contribution for all member towns

Each member town’s share of the above minimum contribution total operating costs of the District for any fiscal year shall be determined on a per pupil student basis by multiplying the above minimum contribution amount total budgeted operating costs by a fraction, the numerator of which shall be each member towns’ average pupil Foundation enrollment, all grades, in the District on the first days of October and December of the five (5) fiscal years preceding the fiscal year for which the apportionment is made, and the denominator of which shall be the average of the total pupil Foundation enrollments from all the member towns in the District on those same dates.

(C) Capital Costs
(1) Beginning with the FY21 budget, capital costs shall include building modifications to the structure and systems that exceed $10,000 and as described in DESE’s Chart of Accounts in the 7000-function code, as may be modified by DESE from time to time. Such capital costs over $10,000 in leased elementary schools will be the responsibility of the town in which the school is located and will not be part of the Committee budget. Capital costs in leased elementary schools to be paid directly to the vendors and not by the District.

(2) Apportionment of Capital Costs

(a) Each member town’s assessment share of capital costs associated with the District’s Junior/Senior High Pioneer Valley Regional School for each fiscal year shall be determined on the basis of equalized valuation and pupil enrollment, in the grades contained in this school, seven to twelve (7 – 12), inclusive. “Equalized valuation” shall mean the equalized valuation of the aggregate property in a member town subject to local taxation as most recently reported by the Commissioner of Revenue to the General Court under the provisions of section ten C of chapter fifty-eight of the General Laws, MGL, Chapter 58, Section 10C, as amended, from time to time; pupil student enrollment in the grades contained in this school, seven to twelve (7 – 12), shall be as of October first of the year immediately preceding the fiscal year for which the capital apportionment is made. Each member town’s share shall be determined by computing to the nearest one-tenth of one percent one-half of the sum of (i) the ratio which its equalized valuation bears to the total of the equalized valuations of all member towns and (ii) the ratio which its pupil student enrollment, in the grades contained in the grades 7 to 12, in the Junior/Senior High Pioneer Valley Regional School bears to the total of the pupil student enrollments at said Junior/Senior High Pioneer Valley Regional School, in grade 7 – 12, of all the member towns in the District.

(b) The capital costs associated with each District elementary school shall be apportioned to the member town in which the school is located.

A member town which has no elementary school is not obligated to pay any capital costs in an elementary school where its students attend.
A member town which has no elementary school shall pay the percentage of capital costs in a school where its students attend based on the ratio of its students compared to all other students in that elementary school.

(D) Except as otherwise hereinafter provided, the payment for proportionate shares of operating and capital costs of each of the member towns for each year shall be made, upon certification by the District Treasurer as specified in Section VII (A) below, by the respective member town Treasurers by check payable to the District in five equal installments on the fifteenth day of August, July, November, October, January, December, April, March, and June. Each member town Treasurer shall pay to the District the town’s proportionate share of capital costs that consist of payments of principal of or interest on bonds or notes issued by the District not later than thirty days before the date on which each payment of such principal of interest is payable by the District, but not earlier than July 1, in any year.

(E) Special Funds

The School Committee shall not interfere with must approve of a town’s use of trust funds or other special funds, including separate town meeting articles, intended for the enhancement of the educational opportunities for that town’s children. The operating budget shall not be altered by the expenditure of such funds.

(F) The fiscal year or period of the District shall be the same as the fiscal period of the member towns as provided by law, and the terms year, fiscal year, or calendar year as used in this Agreement to mean or refer to a fiscal or budget year shall mean the fiscal year of the District.

SECTION VII

Incurring of Debt

The Committee may vote to incur debt consistent with the terms and conditions of MGL, Chapter 71, Section 16, as amended. At the time of taking action to incur debt, and except for the incurring of temporary debt in anticipation of revenue,
the Committee, by two-thirds (2/3) vote, will choose either the process that appears in MGL, Chapter 71, Section 16 (d) or Section 16 (n), as amended.

Not later than seven days after the date on which the Committee authorizes the incurring of debt, other than temporary debt in anticipation of revenue to be received from member towns, written notice of the date of said authorization, the sum authorized, and the general purpose or purposes for authorizing such debt shall be given to the Selectboard in each member town. Debt may be incurred by the District, if approved by the member towns in accordance with the Committee’s chosen method under MGL, Chapter 71, Section 16 (d) or Section 16 (n).

SECTION VIII

Transportation

Transportation to and from the Regional District Schools and any other transportation for Regional District School purposes shall be the responsibility of the Regional School District and its cost shall be apportioned to the member towns as an operating expense, as described in VI (B).

SECTION IX

Procedure Provision for Amendment

(A) This Agreement may be amended from time-to-time in the manner hereinafter provided, but no such amendment shall be made which shall substantially impair the rights of the holders of any bonds or notes or other indebtedness of the District then outstanding, or the rights of the District to procure the means for payment thereof, provided that nothing in this section shall prevent the admission of a new town, or towns, to the District and the reapportionment accordingly of that part of the capital costs represented by bonds or notes of the District then outstanding and of interest thereon.
(1) A proposal for amendment may be initiated by a signed petition bearing the signatures of ten (10) percent of the registered voters as certified by the Town Clerk of any one of the member towns or by vote of a majority of all members of the Regional School District Committee.

(2) Any such proposal for amendment shall be presented to the Secretary of the Committee who shall mail or deliver a notice in writing to the Board of Selectmen Selectboard of each of the member towns that a proposal to amend this Agreement been received and shall enclose a copy of such proposal (without the signatures in the case of a proposal by petition). The Selectmen Selectboard in each member town shall include in the warrant for the next annual or special town meeting called for the purpose an article stating the proposal, or the substance thereof.

(3) When a majority of the member towns, by majority vote at such annual or special town meeting, shall have approved the proposal for amendment and the amended Agreement has been approved by the Commissioner of Elementary and Secondary Education (hereinafter referred to as the “Commissioner”), said amendment shall be adopted thereby and thereupon become a part of this Agreement.

1
2

SECTION X

Admission of Additional Member Towns

By an amendment of this Agreement adopted under and in accordance with Section IX below, any other town or towns may be admitted to the Regional School District upon adoption as therein provided of such amendment and upon acceptance of the Agreement as so amended and also upon compliance with such provisions of law as may be applicable and such terms as may be set forth in such amendment.
(A) By an amendment of this Agreement adopted under and in accordance with Section IX above, any other town or towns may be admitted to the District upon adoption as therein provided of such amendment and upon acceptance at a special or annual town meeting by a majority vote by the town or towns seeking admission of the Agreement as so amended, acceptance by a minimum of two-thirds (2/3) of the member towns, each by majority vote, and also upon compliance with such provisions of law and regulations [e.g., Code of Massachusetts Regulations (hereinafter referred to as “CMR”); i.e., CMR, 41.03, as amended] as may be applicable and such terms as may be set forth in such amendment.

(B) The Committee, prior to the admittance of a new member town, will have the option of establishing an additional cost to that new member town to be included in the District. This additional cost will be clearly articulated to a Regional Planning Committee of the potential new member town(s) and will be made clear to the voters prior to that new member town’s vote on admission to the District.

(C) A new member town may be admitted to the District as of July 1 of any fiscal year, provided that all requisite approvals for such admission, including the Commissioner’s approval, shall be obtained no later than the preceding December 31*.

(D) The new member town will immediately be entitled to three (3) Committee members appointed by the process outlined in Section II (C) Vacancies. Two (2) of the three (3) Committee members will be elected at the next biennial election and the third member will be elected at the following biennial election to provide for a rotation of Committee members. SECTION XI

Withdrawal of Member Towns

(A) Limitation

The withdrawal of a member town from the District may be affected by an amendment to this Agreement in the manner hereinafter provided by this section. Any member town seeking to withdraw shall, by vote of an annual or
special town meeting, request the Committee to draw up an amendment to this Agreement setting forth the terms by which such town may withdraw from the District, provided (1) that the town seeking to withdraw shall remain liable for any unpaid operating costs which have been certified by the District Treasurer to the Treasurer of the withdrawing town, including the full amount so certified for the year in which such withdrawal takes effect and (2) that the said town shall remain liable to the District for its share of the indebtedness, other than temporary debt in anticipation of revenue, of the District outstanding at the time of such withdrawal, and for the interest thereon, to the same extent and in the same manner as though the town had not withdrawn from the District, except that such liability shall be reduced by any amount which such town has paid over at the time of withdrawal and which has been applied to the payment of such indebtedness.

(B) Procedure

The Town Clerk of the town seeking to withdraw shall notify the Committee in writing that such town has voted to request the Committee to draw up an amendment to the Agreement (enclosing a certified copy of such vote). Thereupon, the Committee shall draw up an amendment to the Agreement, setting forth such terms of withdrawal as it deems advisable, subject to the limitation contained in Section XI (A). The Secretary of the Committee shall mail or deliver a notice in writing to the Selectboard of each member town that the Committee has drawn up an amendment to the Agreement providing for the withdrawal of a member town (enclosing a copy of such amendment). The Selectboards of the non-withdrawing member towns shall include in the warrant for the next annual or special town meeting, called for the purpose of an article, the terms of withdrawal. Such amendment shall become effective on a July 1 no less than one full year after the approval by the non-withdrawing member town, acceptance by each town to be a majority vote at a town meeting as aforesaid, and after approval of the Commissioner, no later than the preceding December 31.

(C) Obligations of Member Towns

In addition to other terms and requirements which the Committee shall include in the amendment, the member town(s) seeking to withdraw from the District will be responsible for the following: (1) payment of all operating costs for which
member towns are liable as a member of the District; (2) continuing payments beyond the time of withdrawal from the District for each member town’s share of the indebtedness of the District which is outstanding at the time of withdrawal, and for interest thereon, to the same extent and in the same manner as though each town had not withdrawn from the District; and (3) other liabilities incurred during all times that each town was a member of the District (e.g., OPEB – Other Post-Employment Benefits). All expenses related to the withdrawal of a member town from the District will be borne by the member town which initiates withdrawal from the District.

(D) Approval of Withdrawal

A request to withdraw shall become effective only if the amendment to the Agreement is approved by a majority vote of the Committee, is approved by majority vote at an annual or special town meeting in two-thirds (2/3) a majority of the member towns, is approved by the Commissioner, and the withdrawal from the District can only become effective on a July 1 no less than one full year after the completion of these requirements.

(E) Cessation of Terms of Withdrawing Town’s Members

Upon the effective date of withdrawal from the District, the terms of office of all Committee members from the withdrawing member town serving on the Committee shall terminate.

(F) Payments of Certain Capital Costs Made by a Withdrawing Town

Money encumbered from the member towns for payment of obligations (as outlined in Section XI (C) above) shall be used only for such purpose and until so used shall be deposited in a trust which is established at the time of a member town’s withdrawal.

(G) Division of Assets

All member towns will be entitled to any assets that need to be divided between the towns to be negotiated between the Committee and Selectboard.
SECTION XII

Advisory Committee

(A) Each member town, if it so chooses, shall have an Advisory Committee. The Advisory Committees shall serve the Committee. In the first year of the kindergarten to twelve (K – 12) regional District, until the first district-wide election in 1992, the Advisory Committee in each member town shall be each member town's elementary School Committee then serving upon the adoption of this amendment. Thereafter, The Advisory Committees shall be composed of the elected school committee members from each member town plus two additional members appointed at-large by the Town Moderator of each member town. The at-large members shall serve one-year terms.

(B) The Advisory Committees shall advise the Committee on matters affecting elementary education in their respective towns, including, but not limited to:

(1) Recommendation on budgets;

(2) Recommendations on personnel matters; and

(3) Recommendations on curriculum.

SECTION XII

Regional Amendment Review

(A) Recognizing that over time circumstances often change, and intending that this Agreement should continue to serve the best interests of the member towns, the Committee shall, at least at five-year intervals, establish an ad hoc study group composed of knowledgeable persons to study this Agreement and report to the Committee as to whether or not any changes to this Agreement might be
beneficial in light of the then prevailing conditions. The Committee shall give any such ad hoc study group's report due consideration, but may exercise its discretion as to whether or not it will implement any of the group's recommendations.

(B) This ad hoc Regional Agreement Advisory Committee will be composed of four (4) members of the Committee (one (1) from each member town) appointed by the Committee and four (4) members of the member towns (one (1) from each member town) appointed by the respective Selectboards. All members of the Regional Agreement Advisory Committee shall be appointed for a term of one (1) year. The Superintendent and the School Business Administrator shall be ex-officio members of the Regional Agreement Advisory Committee.

SECTION XIV

Miscellaneous Provisions

(A) The approval of this amended agreement shall not affect the obligation of the member towns to provide education in grades kindergarten through six until such time as the Committee shall assume jurisdiction over education of the pupils in grades kindergarten through six.

(B) The provisions of this amended agreement shall become fully effective as of July 1, 1991, if prior approval is given at duly called town meetings by the member towns as of June 30 and, on and after July 1, 1991 all pupils attending public schools in the member towns of the District shall be under the jurisdiction of the Committee.

SECTION XV

Transition to Regional School District Jurisdiction by Member Towns Over Grades Kindergarten Through Grade Six

This amended Agreement shall take full effect in accordance with its terms upon the affirmative votes of each member town at town meetings held in each such town and
shall thereupon supersede the District Agreement executed as of March 30, 1954 as heretofore amended. The Regional District budget for the fiscal year commencing July 1, 1991 shall consist of the sum of the appropriations made by the member towns for support of the Regional District School, apportioned as provided in Section 5 of the agreement in effect prior to the adoption of this amended agreement, and the appropriations made for elementary schools in the member towns for such fiscal years, including but not limited to all appropriations made for insurance and for school department employee benefits. All obligations under contracts' land agreements binding upon the member towns with respect to schools for the grades kindergarten through six shall be assumed and carried out by the Committee on and after July 1, 1991 to the extent that such obligations would remain in effect on July 1, 1991 and be paid from sums included in the District budget for the fiscal year commencing on that date.

SUGGESTED WARRANT ARTICLE FOR MEMBER TOWNS TO APPROVE THE ABOVE AMENDMENT

ARTICLE: To see if the Town will vote to approve the amendment to the Pioneer Valley Regional School District that is proposed by vote of the Pioneer Valley Regional School District Committee on April 15, 1999. The proposed amendment would change the date on which amounts apportioned to the member towns for principal or interest payments on District bonds or notes shall be paid from the same dates as operating costs shall be paid, as provided in the present Agreement, to a date which is at least thirty days before
the principal or interest is payable on the District bonds or notes, but not earlier than July 1 in any year.

This amendment shall take effect as of July 1, 1999.

1

IN WITNESS WHEREOF, this Agreement has been executed as of

_______________________________

Regional School Committee: ______________________ Date: __________

_______________________________
(Chair)

_______________________________
(typed name)

Town of Bernardston: ______________________ Date: __________

_______________________________
(Town Clerk or BoS Chair)

_______________________________
(typed name)

Town of Leyden: ______________________ Date: __________

_______________________________
(Town Clerk or BoS Chair)

_______________________________
(typed name)

Town of Northfield: ______________________ Date: __________

_______________________________
(Town Clerk or BoS Chair)

_______________________________
(typed name)
Town of Warwick: ___________________ Date:

____________________

___________________ (Town Clerk or BoS Chair)

(typed name)

Commissioner of the Department of Elementary and Secondary Education:

___________________ (typed name) Date:

____________________
Pearl E. Rhodes Elementary School
Grades: PK-4
Opened: 1950
Last Renovation: 1991
Square Footage: 7,050
Enrollment: 33 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>6</td>
<td>6</td>
<td>7</td>
<td>5</td>
<td>3</td>
<td>6</td>
<td>0*</td>
<td>0*</td>
<td>33</td>
</tr>
<tr>
<td>2017-18</td>
<td>3</td>
<td>8</td>
<td>7</td>
<td>2</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>33</td>
</tr>
<tr>
<td>2016-17</td>
<td>4</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>39</td>
</tr>
<tr>
<td>2015-16</td>
<td>10</td>
<td>6</td>
<td>8</td>
<td>5</td>
<td>3</td>
<td>3</td>
<td>7</td>
<td>5</td>
<td>47</td>
</tr>
<tr>
<td>2014-15</td>
<td>5</td>
<td>9</td>
<td>5</td>
<td>2</td>
<td>3</td>
<td>8</td>
<td>5</td>
<td>5</td>
<td>42</td>
</tr>
</tbody>
</table>

Students in 5th and 6th grade were moved to Bernardston Elementary School in the 2018-19 school year.

Numbers reflect school choice students (2018-19 six total students - three in Grade 2, one in Grade 3, and two in Grade 4).
Building Concerns:

The technology space and library are located in the basement of the building.

There is not an elevator in the building, and the egress door in basement is not handicap accessible.

There is a reported mold issue in the basement spaces utilized by students.

### EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Pearl Rhodes Elementary School</th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$404,814</td>
<td>$616,557</td>
</tr>
<tr>
<td>Students</td>
<td>39</td>
<td>33</td>
</tr>
<tr>
<td>Costs Per Student</td>
<td>$10,380</td>
<td>$18,987</td>
</tr>
</tbody>
</table>
Bernardston Elementary School
Grades: PK-6
Opened: 1950
Last Renovation: 1997
Square Footage: 36,870
Enrollment: 159 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>16</td>
<td>18</td>
<td>19</td>
<td>18</td>
<td>22</td>
<td>23</td>
<td>17</td>
<td>26</td>
<td>159</td>
</tr>
<tr>
<td>2017-18</td>
<td>16</td>
<td>18</td>
<td>18</td>
<td>21</td>
<td>22</td>
<td>14</td>
<td>22</td>
<td>26</td>
<td>157</td>
</tr>
<tr>
<td>2016-17</td>
<td>23</td>
<td>19</td>
<td>20</td>
<td>22</td>
<td>15</td>
<td>21</td>
<td>29</td>
<td>27</td>
<td>176</td>
</tr>
<tr>
<td>2015-16</td>
<td>15</td>
<td>18</td>
<td>20</td>
<td>16</td>
<td>21</td>
<td>26</td>
<td>25</td>
<td>24</td>
<td>165</td>
</tr>
<tr>
<td>2014-15</td>
<td>13</td>
<td>13</td>
<td>22</td>
<td>22</td>
<td>21</td>
<td>20</td>
<td>39</td>
<td>22</td>
<td>172</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students (2018-19 school year there are 22 students).

Bernardston Elementary School has a total student population of 159 students, with one classroom for each grade.

Classroom capacity is approximately 25 students per classroom, with one classroom currently with 26 students.
Should Leyden elementary school close, Bernardston class sizes would increase as follows for the 2019-20 school year (with assumption that school choice students remain in district):

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>16*</td>
<td>27</td>
<td>23</td>
<td>26</td>
<td>25</td>
<td>25</td>
<td>29</td>
<td>20</td>
<td>191</td>
</tr>
</tbody>
</table>

* Based on historical averages

While consideration will need to be given to increasing classrooms in grades K, 2 and 5, Bernardston could easily absorb the student population of Pearl Rhodes Elementary School.

EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Bernardston Elementary School</th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$1,125,709</td>
<td>$1,163,404</td>
</tr>
<tr>
<td>Students</td>
<td>176</td>
<td>157</td>
</tr>
<tr>
<td>Costs Per Student</td>
<td>$6,396</td>
<td>$7,410</td>
</tr>
</tbody>
</table>
Warwick Community School  
Grades: PK-6  
Opened: 1999  
Last Renovation: none  
Square Footage: 17,236  
Enrollment: 58 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>2</td>
<td>7</td>
<td>12</td>
<td>9</td>
<td>5</td>
<td>10</td>
<td>4</td>
<td>9</td>
<td>58</td>
</tr>
<tr>
<td>2017-18</td>
<td>4</td>
<td>10</td>
<td>9</td>
<td>6</td>
<td>11</td>
<td>4</td>
<td>8</td>
<td>7</td>
<td>59</td>
</tr>
<tr>
<td>2016-17</td>
<td>0</td>
<td>8</td>
<td>6</td>
<td>10</td>
<td>3</td>
<td>8</td>
<td>11</td>
<td>11</td>
<td>57</td>
</tr>
<tr>
<td>2015-16</td>
<td>2</td>
<td>4</td>
<td>9</td>
<td>4</td>
<td>7</td>
<td>13</td>
<td>10</td>
<td>2</td>
<td>56</td>
</tr>
<tr>
<td>2014-15</td>
<td>5</td>
<td>10</td>
<td>3</td>
<td>8</td>
<td>11</td>
<td>7</td>
<td>1</td>
<td>10</td>
<td>55</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students, which at 27 students represents a little less than half of student population. Principal advised there are 4 new students who have recently moved into town which are not reflected in these numbers.
Concerns:

There is a kitchen attached to the cafeteria, however the food is prepared and transported by Northfield Elementary School for their one lunch session.

The school does not offer a before and after school program.

The school has a principal who works part-time.

EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Warwick Community School</th>
<th>FY16</th>
<th>FY17</th>
<th>FY17 with $135,000 School Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$582,060</td>
<td>$698,187</td>
<td>$573,187</td>
</tr>
<tr>
<td>Students</td>
<td>57</td>
<td>59</td>
<td>33</td>
</tr>
<tr>
<td>Cost Per Student</td>
<td>$10,212</td>
<td>$11,834</td>
<td>$17,369</td>
</tr>
</tbody>
</table>
Northfield Elementary School
Grades: PK-6
Opened: 1910
Last Renovation: 1991
Square Footage: 42,000
Enrollment: 185 students

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td>18</td>
<td>24</td>
<td>23</td>
<td>22</td>
<td>27</td>
<td>24</td>
<td>21</td>
<td>26</td>
<td>185</td>
</tr>
<tr>
<td>2017-18</td>
<td>14</td>
<td>24</td>
<td>20</td>
<td>24</td>
<td>26</td>
<td>22</td>
<td>25</td>
<td>31</td>
<td>186</td>
</tr>
<tr>
<td>2016-17</td>
<td>14</td>
<td>16</td>
<td>24</td>
<td>20</td>
<td>28</td>
<td>28</td>
<td>28</td>
<td>35</td>
<td>186</td>
</tr>
<tr>
<td>2015-16</td>
<td>14</td>
<td>23</td>
<td>20</td>
<td>23</td>
<td>29</td>
<td>28</td>
<td>34</td>
<td>29</td>
<td>200</td>
</tr>
<tr>
<td>2014-15</td>
<td>15</td>
<td>17</td>
<td>24</td>
<td>28</td>
<td>24</td>
<td>34</td>
<td>31</td>
<td>23</td>
<td>196</td>
</tr>
</tbody>
</table>

Numbers reflect school choice students (2018-19 school year there are 3 students).

Northfield Elementary School houses the district’s special education programs.

There is a kitchen and large cafeteria with 5 lunch sessions. Northfield prepares and staff member delivers food to Warwick, then remains to serve students.
Should Warwick’s elementary school close, Northfield class sizes would increase as follows for the 2019-20 school year (with assumption that school choice students remain in district):

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>PK</th>
<th>K</th>
<th>G.1</th>
<th>G.2</th>
<th>G.3</th>
<th>G.4</th>
<th>G.5</th>
<th>G.6</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-20</td>
<td>16</td>
<td>20+</td>
<td>31</td>
<td>35</td>
<td>31</td>
<td>32</td>
<td>34</td>
<td>25</td>
<td>222</td>
</tr>
</tbody>
</table>

While consideration will need to be given to reconfiguring classrooms to include two unused classroom spaces, Northfield could absorb the student population of Warwick Community School. Northfield would need 14 classrooms (2 classrooms for each grade except PK and grade 6).

EOYR Per Pupil Spending

<table>
<thead>
<tr>
<th>Northfield Elementary School</th>
<th>FY16</th>
<th>FY17</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule 3 Function 2000</td>
<td>$1,507,964</td>
<td>$1,491,925</td>
</tr>
<tr>
<td>Students</td>
<td>186</td>
<td>186</td>
</tr>
<tr>
<td>Costs Per Student</td>
<td>$8,107</td>
<td>$8,021</td>
</tr>
</tbody>
</table>
Parent/Guardian Survey for Students Not Enrolled in PVRSD
Elementary School (PK-6)

Pioneer Valley Regional School District (PVRSD) is conducting a survey of parents/guardians to identify ways in which we could better serve the needs of all residents. We are sending this particular survey to families with children that live in PVRSD but chose not to enroll their child in the district. Please take a moment to answer the following questions about the factors involved in your choice.

This survey should take less than 10 minutes to complete.

The results of this survey will be used to help develop our understanding of why families choose schools other than the PVRSD. Thank you for your time and your thoughtful feedback.

1A. Please advise where you child currently attends school:
   □ Private    □ Homeschool    □ Charter    □ Different Public School District

1B. Before making choice to homeschool or attend a school elsewhere, did your child attend a school in the PVRSD?
   □ Yes    □ No

1C. If so, please check the box next to all school(s) that he or she attended?
   □ Pearl Rhodes Elementary
   □ Northfield Elementary
   □ Bernardston Elementary
   □ Warwick Community School

2. What do you think are the most notable strengths of PVRSD?
   Check all that apply
   □ Curriculum/Instruction
   □ Student Support Services/Special Education
   □ Faculty & Staff
   □ Arts Offering
   □ Family Involvement
   □ Social Climate
   □ School Safety
   □ Small Class Size
   □ Unsure
   □ Other(s):

3A. What factors led you to homeschool, or to enroll your child in a school outside of PVRSD?
   Check all that apply
   □ More academic options in new district
   □ Less time off for professional development
   □ Student Support Services/Special Education
   □ New district is more convenient location
   □ Social/Emotional issues
   □ Issues with administrator(s)
   □ Better access to technology
   □ More diversity in new district
   □ Before and after school offerings
   □ Larger class size in new district
   □ Start/End times in new district
   □ Issues with teacher(s)/staff
   □ Other(s):

3B. Please explain your selections from above:

________________________________________________________________________

________________________________________________________________________

1
4. What sources of information did you use in choosing a school setting outside of PVRSD?
   Check all that apply
   □ Newspapers
   □ Family, friends, neighbors, or other parents of children in the school
   □ In-person visit to the school
   □ Other (please specify):
   □ School website
   □ Academic achievement data (state report card on schools, GreatSchools, etc.).
   □ Word of mouth

5. What do you think are the most notable strengths of the school that your child currently attends (i.e., the non-PVRSD school)?
   Check all that apply
   □ Curriculum/Instruction
   □ Student Support Services/Special Education
   □ Faculty & Staff
   □ Arts Offering
   □ Family Involvement
   □ Social Climate
   □ School Safety
   □ Small Class Size
   □ Unsure
   □ Other(s):

6. From the list below, please choose the four factors that are most important to you in choosing a school:
   □ Location
   □ Before and after school offerings
   □ Student Support Services/Special Education
   □ School Size
   □ Past School Performance
   □ Other (please specify):
   □ Curriculum/Instruction
   □ Faculty/Staff
   □ Diversity of Student Population
   □ Class Size
   □ School Safety

7. What could the PVRSD do to make its public schools more attractive to families like yours?

8. Is there anything else you would like us to know about your experience with the out of district program, or with PVRSD schools?

The PVRSD strives to serve the needs of all residents, and we thank you for taking the time to share your thoughts. Please return this survey in the enclosed pre-stamped envelope.

If you would like to be contacted by a member of the PVRSD to discuss the responses to your survey further please list your name, telephone number and/or email address below. If you do not list contact information, PVRSD will not make any further attempts to contact you:

Name: 

E-mail: 

Phone number: 
Parent/Guardian Survey for Students Not Enrolled in PVRSD

PIONEER VALLEY REGIONAL SCHOOL (7-12)

Pioneer Valley Regional School District (PVRSD) is conducting a survey of parents/guardians to identify ways in which we could better serve the needs of all residents. We are sending this particular survey to families with children that live in PVRSD but chose not to enroll their child in the district. Please take a moment to answer the following questions about the factors involved in your choice.

This survey should take less than 10 minutes to complete.

The results of this survey will be used to help develop our understanding of why families choose schools other than the PVRSD. Thank you for your time and your thoughtful feedback.

1A. Please advise where your child currently attends school:
   - [ ] Private
   - [ ] Homeschool
   - [ ] Charter
   - [ ] Different public school district

1B. Before making choice to homeschool or attend a school elsewhere, did your child attend a school in the PVRSD?
   - [ ] Yes
   - [ ] No

1C. If so, please check the box next to all school(s) that he or she attended?
   - [ ] Pearl Rhodes Elementary
   - [ ] Bernardston Elementary
   - [ ] Northfield Elementary
   - [ ] Warwick Community School
   - [ ] Pioneer Valley Regional School

2. What do you think are the most notable strengths of PVRSD?
   Check all that apply
   - [ ] Academic achievement
   - [ ] Student support services/special education
   - [ ] Faculty & Staff
   - [ ] Music program (Band/Chorus)
   - [ ] Community engagement
   - [ ] School culture
   - [ ] Variety of academic programs
   - [ ] School safety
   - [ ] Sports
   - [ ] Clubs/other extracurricular offerings
   - [ ] Other(s):

3A. What factors led you to homeschool, or to enroll your child in a school outside of PVRSD?
   Check all that apply
   - [ ] More academic options in new district
   - [ ] Less time off for professional development
   - [ ] Student support services/special education
   - [ ] New district is more convenient location
   - [ ] Social/emotional issues
   - [ ] Financial issues in PVRSD
   - [ ] Athletic program in new district
   - [ ] Better access to technology
   - [ ] More diversity in new district
   - [ ] Extracurricular activities in new district
   - [ ] Smaller class size in new district
   - [ ] Start/end times in new district
   - [ ] Issues with teacher(s)/staff
   - [ ] Other(s):
3B. Please explain your selections from previous questions:

4. What sources of information did you use in choosing a school setting outside of PVRSD?
   
   Check all that apply
   □ Newspapers
   □ Family, friends, neighbors, or other parents
   □ Word of mouth
   □ Children in the school
   □ In-person visit to the school
   □ Other (please specify):
   □ School website
   □ Academic achievement data (state report card
   on schools, GreatSchools, etc.).

5. What do you think are the most notable strengths of the school that your child currently attends (i.e., the non-
PVRSD school)?
   
   Check all that apply
   □ Academic achievement
   □ Variety of academic programs
   □ Student support services/special education
   □ School safety
   □ Faculty & Staff
   □ Sports
   □ Music program (Band/Chorus)
   □ Clubs/other extracurricular offerings
   □ Community engagement
   □ Other(s):
   □ School culture

6. From the list below, please choose the four factors that are most important to you in choosing a school:
   
   □ Location
   □ Curriculum/Instruction
   □ Before and after school offerings
   □ Faculty/staff
   □ Student support services/special education
   □ Diversity of student population
   □ School size
   □ Class size
   □ Past school performance
   □ School safety
   □ Other (please specify):
   □ School culture

7. What could the PVRSD do to make its public schools more attractive to families like yours?

8. Is there anything else you would like us to know about your experience with the out of district program, or with
   PVRSD schools?

   The PVRSD strives to serve the needs of all residents, and we thank you for taking the time to share your thoughts.
   Please return this survey in the enclosed pre-stamped envelope.
   
   If you would like to be contacted by a member of the PVRSD to discuss the responses to you survey further please list
   your name, telephone number and/or email address below. If you do not list contact information, PVRSD will not make
   any further attempts to contact you:

   Name: ________________________________

   E-mail: ________________________________  Phone number: ________________________________
Pioneer Elementary School (PK-6)

Q1
1A. Please advise where you child currently attends school:

Answered: 4  Skipped: 0

- Private
- Homeschool
- Charter
- Different Public School
- District

ANSWER CHOICES
Private: 75.00% 3
Homeschool: 0.00% 0
Charter: 0.00% 0
Different Public School District: 25.00% 1
TOTAL: 100.00% 4

Q2
1B. Before making choice to homeschool or attend a school elsewhere, did your child attend a school in the PVRSD?

Answered: 4  Skipped: 0

- Yes
- No

Share Link  https://www.surveymonkey.com/n  COPY  Share  4 responses
<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>25.00%</td>
</tr>
<tr>
<td>No</td>
<td>75.00%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4</td>
</tr>
</tbody>
</table>

Q3

1C. If so, please check the box next to all school(s) that he or she attended?

Answered: 1  Skipped: 3

- Pearl Rhodes Elementary
- Bernardston Elementary
- Northfield Elementary
- Warwick Community

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pearl Rhodes Elementary</td>
<td>100.00%</td>
</tr>
<tr>
<td>Bernardston Elementary</td>
<td>0.00%</td>
</tr>
<tr>
<td>Northfield Elementary</td>
<td>0.00%</td>
</tr>
<tr>
<td>Warwick Community School</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

Q4

What do you think are the most notable strengths of PVRSD?

Answered: 3  Skipped: 1
ANSWER CHOICES

More academic options in new district
More diversity in new district
Less time off for professional development
Before and after school offerings
Student Support Services/Special Education
Larger class size in new district
New district is more convenient location
Start/End times in new district
Social/Emotional issues
Issues with teacher(s)/staff
Issues with administrator(s)
Better access to technology
Other (please specify)

RESPONSES

More academic options in new district 50.00% 1
More diversity in new district 50.00% 1
Less time off for professional development 50.00% 1
Before and after school offerings 0.00% 0
Student Support Services/Special Education 0.00% 0
Larger class size in new district 0.00% 0
New district is more convenient location 0.00% 0
Start/End times in new district 50.00% 1
Social/Emotional issues 0.00% 0
Issues with teacher(s)/staff 0.00% 0
Issues with administrator(s) 0.00% 0
Better access to technology 50.00% 1
Other (please specify) 50.00% 1

Total Respondents: 2

Q6

3B. Please explain your selections from above:

Answered: 4  Skipped: 0
What sources of information did you use in choosing a school setting outside of PVRSD?

**Answered:** 4  **Skipped:** 0

**ANSWER CHOICES**

- Newspapers: 0.00% 0
- School website: 0.00% 0
- Family, friends, neighbors, or other parents of children in the school: 50.00% 2
- Academic achievement data (state report card on schools, GreatSchools, etc.): 25.00% 1
- In-person visit to the school: 75.00% 3
- Word of mouth: 75.00% 3
- Other (please specify): 25.00% 1
- Total Respondents: 4

What do you think are the most notable strengths of the school that your child currently attends (i.e., the non-PVRSD school)?

**Answered:** 4  **Skipped:** 0
Q9

From the list below, please choose the four factors that are most important to you in choosing a school:

Answered: 3  Skipped: 1
Q10

What could the PVRSD do to make its public schools more attractive to families like yours?

Answered: 2  Skipped: 2

Actually teach the kids.
2/16/2019 9:05 PM

Improve financial situation, join schools, utilize money saved into teachers and programs.
2/18/2019 9:02 PM
Q11
Is there anything else you would like us to know about your experience with the out of district program, or with PVRSD schools?

Answered: 2  Skipped: 2

My son has learned so much and now enjoys going to school, something that didn't happen in the PVRSD school.

2/15/2019 9:05 PM

PVRSD should get students back once you resolve financial situation and stay out of the headlines for the many problems.

2/15/2019 9:02 PM
Pioneer Valley Regional School (7-12)

Families out of district.

**Q1**

1A. Please advise where your child currently attends school:

Answered: 14  Skipped: 0

- Private
- Homeschool
- Charter
- Different public school district

**ANSWER CHOICES**

- Private: 50.00% 7
- Homeschool: 21.43% 3
- Charter: 14.29% 2
- Different public school district: 14.29% 2
- **TOTAL:** 14

**Q2**

1B. Before making the choice to homeschool or attend a school elsewhere, did your child attend a school in the PVRSD?

Answered: 14  Skipped: 0

- Yes
- No

14 responses
Q3

1C. If so, please check the box next to all school(s) that he or she attended?

Answered: 9   Skipped: 5

ANSWER CHOICES
- Pearl Rhodes Elementary
- Bernardston Elementary
- Northfield Elementary
- Warwick Community School
- Pioneer Valley Regional School

TOTAL

RESPONSES
- 0.00%   0
- 0.00%   0
- 55.56%  5
- 0.00%   0
- 44.44%  4

TOTAL

Q4

What do you think are the most notable strengths of PVRSD?

Answered: 11   Skipped: 3
3A. What factors led you to homeschool, or to enroll your child in a school outside of PVRSD?

Answered: 11  Skipped: 3
3B. Please explain your selections from previous questions:

**Q6**

Answered: 9  |  Skipped: 5

Share Link: https://www.surveymonkey.com/r/...
Saw my child not achieving his potential - current school is able to achieve this.
2/14/2019 12:51 AM

My children attended/are attending NMH which is a very different high school experience.
2/14/2019 12:39 AM

My children were fortunate to have access to NMH - which is where they attended/are attending high school.
2/14/2019 12:35 AM

We travel to Haiti quite a bit and sometimes stay for 3 months. Homeschool has always worked best for us.
2/14/2019 12:26 AM

Q7

What sources of information did you use in choosing a school setting outside of PVRSD?

Answered: 13  Skipped: 1

ANSWER CHOICES

<table>
<thead>
<tr>
<th>Option</th>
<th>Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Newspapers</td>
<td>0.00% 0</td>
</tr>
<tr>
<td>School website</td>
<td>23.08% 3</td>
</tr>
<tr>
<td>Family, friends, neighbors, or other parents</td>
<td>69.23% 9</td>
</tr>
<tr>
<td>Academic achievement data (state report card on schools, GreatSchools, etc.)</td>
<td>38.46% 5</td>
</tr>
<tr>
<td>In-person visit to the school</td>
<td>69.23% 9</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>38.46% 5</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>Responses 30.77% 4</td>
</tr>
<tr>
<td>Total Respondents: 13</td>
<td></td>
</tr>
</tbody>
</table>
What do you think are the most notable strengths of the school that your child currently attends (i.e., the non-PVRSD school)?

Answered: 13  Skipped: 1

<table>
<thead>
<tr>
<th>Academic achievement</th>
<th>Variety of academic</th>
<th>Student support</th>
<th>School safety</th>
<th>Faculty &amp; Staff</th>
<th>Sports</th>
<th>Music program (Band/Chorus)</th>
<th>Clubs/other extracurricular offerings</th>
<th>Community engagement</th>
<th>School culture</th>
<th>Other (please specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>80%</td>
<td>70%</td>
<td>50%</td>
<td>40%</td>
<td>30%</td>
<td>20%</td>
<td>10%</td>
<td>10%</td>
<td>10%</td>
<td>50%</td>
<td>20%</td>
</tr>
</tbody>
</table>

ANSWER CHOICES

Academic achievement 76.92% 10
Variety of academic programs 61.54% 8
Student support services/special education 15.38% 2
School safety 30.77% 4
Faculty & Staff 61.54% 8
Sports 46.15% 6
Music program (Band/Chorus) 30.77% 4
Clubs/other extracurricular offerings 38.46% 5
Community engagement 38.46% 5
School culture 69.23% 9
Other (please specify) Responses 46.15% 6

Total Respondents: 13

Q9

From the list below, please choose the four factors that are most important to you in choosing a school:

Answered: 13  Skipped: 1
Q10

What could the PVRSD do to make its public schools more attractive to families like yours?

Answered: 8  Skipped: 6

Differentiate Instruction within a heterogeneous classroom offered by choice. Zero tolerance for bigotry and social isolation. Offer honors and AP classes on site (not at GCC etc.).

2/14/2019 1:03 AM

Q11
Is there anything else you would like us to know about your experience with the out of district program, or with PVRSD schools?

Answered: 6  Skipped: 6

We felt a tremendous lack of communication coming to us from the school and a lot of resistance when we came to the school with concerns regarding our daughter. PVRSD needs something akin to a PTO or a parent advisory council.

2/14/2019 1:03 AM

Sorry to have left, but saw better opportunity for upward mobility across the street.

2/14/2019 12:51 AM

Our experience at NES was wonderful. Band was especially great. Megan is a great leader and asset to NES, but overall many great teachers/staff there.

2/14/2019 12:44 AM

We had a great experience at Northfield Elementary. Unfortunately, PVRSD is located in an area with many educational options. Especially from private/boarding schools.
Approved by the HEART Committee/Regional Study Committee
February 20, 2019

PIONEER VALLEY REGIONAL SCHOOL DISTRICT AGREEMENT

The Agreement entered into pursuant to Chapter 71 of the General Laws of Massachusetts (hereinafter referred to as “MGL”), as amended, among the Towns of Bernardston, Leyden, Northfield and Warwick, (hereinafter referred to as “member towns”), establishing the Pioneer Valley Regional School District (hereinafter referred to as the “District”) is hereby further amended in its entirety to read as hereinafter set forth. This amended Agreement will go into effect on ______________.

In consideration of the mutual promises herein contained, IT IS HEREBY AGREED AS FOLLOWS:

SECTION I

Type of Regional School District

(A) The District shall include all grades from Pre-kindergarten through grade twelve (PK – 12), inclusive.

(B) The District Committee (hereinafter referred to as the “Committee”) shall also have the right to establish adult evening education courses.

(C) The Committee is hereby authorized, in its discretion to establish and maintain state-aided vocational education, acting as trustees therefore in accordance with the provisions of MGL, Chapter 74 and any acts amendatory thereof in additional thereto or dependent thereon and any other special educational classes in accordance with the provisions of any other general or special law related thereto.

SECTION II

The Regional School District Committee

(A) Powers, Duties and Composition

(1) The powers and duties of the District shall be vested in and exercised by a Committee. The Committee shall consist of thirteen (13) members, three members from each member town and one member elected at large from one of the four (4) member towns who receives the most votes from all member towns. All at-large candidates will register in their town of residence to be placed on the common ballot for all member towns.

(2) A majority of the members of the Committee shall constitute a quorum, but a lesser number may adjourn.
(3) The Committee shall have all the powers and duties conferred and imposed upon school committees by law and conferred and imposed by this Agreement, and such other additional powers and duties as are specified in MGL, Chapter 71, Sections 16 to 16f, inclusive, as amended, or as may be specified in any other applicable general or special law.

(4) At the first regular meeting to be held after the conclusion of the District election, the Committee shall organize and choose a Chairperson and a Vice Chairperson from its own membership. The Chairperson and Vice Chairperson positions shall be rotated among Committee members every two (2) years. At the same meeting, or at any other meeting, the Committee shall appoint a Treasurer and Secretary, fix the time and place for its regular meetings and provide for the calling of special District meetings. The Chairperson will appoint members to serve on subcommittees.

(B) Elections

(1) Each Committee member shall be entitled to one vote at all Committee meetings. In compliance with the Supreme Court’s “one person, one vote” principle, members will be elected in district-wide, at-large elections, with members required to be residents of specific communities such that the total number of Committee members will be thirteen (13) with three (3) members from each member town and one (1) member-at-large.

(2) At every District election, there shall be elected to membership on the Committee for terms of four years, or for any unexpired term as outlined in Subsection I II (C), such persons as shall maintain the Committee at thirteen (13) members and preserve the residency requirements as stated in Subsection I II (A) (1) of this section.

(3) No Committee member shall serve more than two (2) consecutive four-year terms. Committee members who have served for two (2) consecutive terms may fill a vacancy during the two (2) consecutive years after the end of their second consecutive term. Filling a vacancy will not be considered the first year of a new term of office.

(4) The District election shall be held at the biennial state election, normally on the Tuesday next after the first Monday in November of every even numbered year. District elections shall be conducted in accordance with the Massachusetts General Laws.

(C) Vacancies

A vacancy occurs when a person resigns, moves out of the member town, or dies. Vacancies that occur on the Committee shall be filled by appointment of the Selectboard (“Selectmen” hereinafter referred to as “Selectboard”) and the remaining Committee members (without the Committee member-at-large) from the town concerned, acting jointly by a two-thirds (2/3) vote, to serve until the next District election, at which time a successor shall be elected to serve for the
balance of the unexpired term. A vacancy in the member-at-large position will be filled, as above, by the Selectboard of the member town in which the member-at-large was a resident and the Committee members from that town.

SECTION III

Students

(A) Students who reside in the member towns will attend schools according to Committee policy. A school will not be closed permanently without going through the process outlined in Section IV (C).

(B) Students with disabilities receiving services with an approved Individual Educational Plan under the provisions of MGL, Chapter 71-B, as amended, shall attend schools as recommended by the Special Education Administrator and approved by the Superintendent.

(C) Students residing outside the District may attend the District’s schools, with the approval of the Committee, provided that adequate facilities for such students are available and upon the appropriate payment of tuition as recommended by the Superintendent and approved by the Committee. Including School Choice students is at the discretion of the Committee and is subject to the regulations promulgated by DESE.

(D) Students of the District wishing to attend vocational schools may do so in the manner provided by MGL, Chapter 74, as amended.

SECTION IV

Location and Lease of the Member Town Schools

(A) All schools which are part of the District shall be located in member towns. Any new schools constructed within the District shall be located at a site or sites within the member towns.

(B) Leases

(1) The District shall lease from member towns the building, facilities and grounds for all elementary schools operating as a school in the District. The District shall enter into written leases of the elementary schools, which shall include contracts for services. Each lease shall be for a term not to exceed twenty (20) years. The leases may contain provisions for an extension in accordance with the provisions of MGL, Chapter 71, Section 14C, as amended. The member towns shall receive no rental for the leases. The District shall administer all expenses for maintaining and operating such buildings, facilities and grounds and keeping them in good repair during the terms of the leases.
(2) Nothing contained in the leases shall prevent the Committee from permitting the use of the building, facilities, and grounds by the member towns. Each lease involving a member town shall be on such other terms as may be determined by the Selectboard thereof and the Committee, who shall together execute the leasing agreement on behalf of the town owning the building.

(3) The District shall insure, at its expense, the buildings, facilities, and grounds so leased. Details of such insurance shall be determined after consultation with the Selectboard the leasing agreement on behalf of the town owning the building(s).

(C) Process To Close A School

(1) A vote by the Committee to begin the study must be taken at least ten (10) months prior to its vote to close a school and must pass with a two-thirds (2/3) majority. Under extraordinary circumstances, this timeline may be modified by a two-thirds (2/3) majority vote of the Committee with representatives from at least three (3) towns voting to support the modified timeline.

(2) Closure of any school within the District shall not be done without the District’s Central Office Administrators conducting a five-year projected feasibility study [see (a) – (e)] initiated at least ten (10) months in advance of the proposed closing.

(a) A study of the educational impact on students.

(b) A fiscal analysis to determine the cost savings, the impact on the regional budget, and the individual assessments to the member towns.

(c) A review of the educational reorganization and administrative structure and its financial impact.

(d) A review of population trends to determine the long-term impact of the closing.

(e) A process in which the Committee sets up an ad hoc committee to review the feasibility and make recommendations to the School Committee which includes: one (1) member from each member town appointed by the Committee; and two (2) members from each member town appointed by the respective Selectboards. The School Committee shall give any such ad hoc committee’s recommendations due consideration, but may exercise its discretion as to whether or not it will implement any of the group’s recommendations.
(f) A quorum of the School Committee will hold a public forum with two (2) weeks' notice in the member town where the school is being proposed to be closed prior to the vote of the Committee.

(3) A school may then be closed at the first June 30+ after the Committee vote.

(4) A vote by the Committee to close the school shall require a two-thirds (2/3) majority vote of the Committee with representatives from at least three (3) towns voting to support closure. The vote shall be held at a regularly scheduled Committee meeting.

(5) Closure of a school is defined as no longer assigning District students to that particular school. The town affected by the Committee vote still maintains control and ownership of the facility and may utilize the facility as it sees fit.

(6) The District will pay, in each of three (3) years, the same amount to the Town in which a town-owned elementary school is being closed, 50% of the budgeted costs to maintain a fully functioning school, in the fiscal year in which the Committee votes to close a school in the following categories: fuel, light/power/water, telephone, maintenance of grounds supplies, maintenance of buildings C/S, maintenance of building supplies, maintenance of equipment C/S, maintenance of equipment supplies, and insurance. District payments to the member town will be made by the end of the following months: August; November; January; and April. Beginning with the July 1 immediately after the school is closed, the lease for that school will be terminated and the District will have no further financial or other responsibility for the building and grounds. If the closed building is sold or fully repurposed prior to the end of this three (3) year period, the District will no longer be responsible for this compensation.

SECTION V

Budget

(A) Budget

The Committee shall annually determine the District's budget consistent with the timelines, terms and requirements of MGL, Chapter 71, Section 16B, as amended, and other pertinent provisions of law and consistent with regulations promulgated by the Department of Elementary and Secondary Education (hereinafter referred to as “DESE”).

(B) Public Budget Hearing and Budget Approval

(1) After conducting a public hearing consistent with MGL, Chapter 71, Section 38N, as amended, the Committee, by a minimum two-thirds (2/3) vote of
all its members, shall annually approve a budget for the next fiscal year to maintain and operate the District. After deducting the amount of aid the District is to receive, the balance shall be apportioned among the member towns in accordance with Section VI.

(2) The budget will be itemized in such detail as the Committee may deem advisable. Such budget shall be adopted not later than forty-five (45) days prior to the earliest date on which the business session of the annual town meeting of any member town is to be held, but in no event later than March 31, provided that said budget need not be adopted earlier than February 1. The amounts so apportioned for each member town shall be certified by the District Treasurer to the Treasurers of the member towns within thirty (30) days from the date on which the annual operating budget is adopted by the Committee.

(3) The annual budget as adopted by a two-thirds (2/3) vote of the Committee, must be approved by a simple majority vote at two-thirds (2/3) of the member town meetings.

(4) The Committee shall each year submit an annual report to each of the member towns, containing a detailed financial statement, and a statement showing the method by which the annual charges assessed against each town were computed, together with such additional information relating to the operation and maintenance of the District as may be deemed necessary by the Committee or by the Selectboard of any member town and each member town shall include said report in its annual report.

(5) Amendments to the Approved Budget [CMR 41.05 (5), as amended]

(a) A regional school committee may propose, with a two-thirds vote, an amendment to a previously approved budget. If such amendment results in an increase in the total amount of the budget or an increase in assessment for any member, such amendment shall be submitted to the local appropriating authorities for their approval. The treasurer of the regional school district shall submit the proposed amendment to the members within 7 days from the date of the regional school committee vote. The local appropriating authority of every member shall have 45 days from the date of the regional school committee’s vote to meet and consider the amendment. The proposed amendment shall be effective if it is approved by two-thirds of the local appropriating authorities and by the local appropriating authority of any member whose assessment is increased.

(b) If a local appropriating authority does not vote on the proposed amendment within the 45-day period and that local appropriating authority has previously appropriated funds for its assessment in an amount greater than or equal to the member’s assessment for the amended budget, that member shall be deemed to have approved the amended budget.
(c) If a proposed amendment to a previously approved budget does not
increase the total amount of the budget and reduces or leaves unchanged the
assessment for every member, the amendment shall not require approval by
the local appropriating authorities and shall be effective upon a two-thirds
vote of the regional school committee.

SECTION VI

Apportionment and Payment of Costs Incurred by the District

(A) **Classification of Costs**

For the purpose of apportioning assessments by the District to the member towns,
costs shall be divided into four (4) categories: operating costs, capital costs, debt,
and transportation costs. The Committee shall determine the amount necessary to
meet the annual operating, capital, debt, and transportation needs and shall
allocate such amount among the member towns.

(B) **Operating Costs**

(1) Operating costs shall include all costs except capital, debt, and
transportation costs but shall include interest on temporary notes issued by
the District in anticipation of revenue.

(2) **Apportionment of Operating Costs**

The total operating costs assessed to each member town will consist of the
member town's Minimum Local Contribution and the town's share of
Above Minimum Local Contribution.

The aggregate Above Minimum Contribution is arrived at by subtracting from the
Operating Budget the following: Chapter 70 aid, the Minimum Required
Combined Local Contributions of all member towns, and other general revenue
sources to the District. [Or as may be modified by DESE from time to time.]
This formula is illustrated below:

Operating Budget (which excludes capital, debt, and
transportation)
- (minus) Chapter 70 aid (as calculated by DESE)
- (minus) Minimum Required Combined Local Contributions of
  all member towns (as calculated by DESE)
- (minus) Other general revenue sources to the District
= (equals) Total Above Minimum Contribution for all member
towns

Each member town's share of the above minimum contribution
shall be determined on a per student basis by multiplying the
above minimum of contribution amount by a fraction, the
numerator of which shall be each member towns’ average 
Foundation enrollment, all grades, in the District on the first days 
of October of the five (5) fiscal years preceding the fiscal year for 
which the apportionment is made, and the denominator of which 
shall be the average of the total Foundation enrollments from all 
the member towns in the District on those same dates. In the event 
that the state changes its Foundation formula apportionment of 
costs to member towns, such formula shall supersede the 
calculation noted in section (B) (2).

(C) Capital Costs

(1) Beginning with the FY21 budget, capital costs shall include building 
modifications to the structure and systems that exceed $10,000 and as 
described in DESE’s Chart of Accounts in the 7000-function code, as may be 
modified by DESE from time to time. Such capital costs over $10,000 in 
leased elementary schools will be the responsibility of the town in which 
the school is located and will not be part of the Committee budget Capital 
costs in leased elementary schools to be paid directly to the vendors and 
not by the District.

(2) Apportionment of Capital Costs

(a) Each member town’s assessment of capital costs associated with the 
District’s Pioneer Valley Regional School for each fiscal year shall be 
determined on the basis of equalized valuation and pupil enrollment, in the 
grades contained in this school. “Equalized valuation” shall mean the 
equalized valuation of the aggregate property in a member town subject to 
local taxation as most recently reported by the Commissioner of Revenue to 
the General Court under the provisions of MGL, Chapter 58, Section 10C, as 
amended, from time to time; student enrollment in the grades contained in 
this school, shall be as of October first of the year immediately preceding the 
fiscal year for which the capital apportionment is made. Each member town’s 
share shall be determined by computing the nearest one-tenth of one 
percent one-half of the sum of (i) the ratio which its equalized valuation bears 
to the total of the equalized valuations of all member towns and (ii) the ratio 
which its student enrollment, in the grades contained in the Pioneer Valley 
Regional School bears to the total of the student enrollments at said Pioneer 
Valley Regional School of all the member towns in the District.

(b) The capital costs associated with each District elementary school shall be 
apportioned to the member town in which the school is located.

A member town which has no elementary school is not obligated to pay any 
capital costs in an elementary school where its students attend.

(D) Except as otherwise hereinafter provided, the payment for proportionate shares of 
operating and capital costs of each of the member towns for each year shall be 
made, upon certification by the District Treasurer as specified in Section VII (A)
below, by the respective member town Treasurers payable to the District in five equal installments on the fifteenth day of July, October, December, March, and May. Each member town Treasurer shall pay to the District the town’s proportionate share of capital costs that consist of payments of principal of or interest on bonds or notes issued by the District not later than thirty days before the date on which each payment of such principal of interest is payable by the District, but not earlier than July 1, in any year.

(E) Special Funds

The Committee must approve of a town’s use of trust funds or other special funds, including separate town meeting articles, intended for the enhancement of the educational opportunities for that town’s children. The operating budget shall not be altered by the expenditure of such funds.

(F) The fiscal year or period of the District shall be the same as the fiscal period of the member towns as provided by law, and the terms year, fiscal year, or calendar year as used in this Agreement to mean or refer to a fiscal or budget year shall mean the fiscal year of the District.

SECTION VII

Incurring of Debt

The Committee may vote to incur debt consistent with the terms and conditions of MGL, Chapter 71, Section 16, as amended. At the time of taking action to incur debt, and except for the incurring of temporary debt in anticipation of revenue, the Committee, by two-thirds \((2/3)\) vote, will choose either the process that appears in MGL, Chapter 71, Section 16 (d) or Section 16 (n), as amended.

Not later than seven days after the date on which the Committee authorizes the incurring of debt, other than temporary debt in anticipation of revenue to be received from member towns, written notice of the date of said authorization, the sum authorized, and the general purpose or purposes for authorizing such debt shall be given to the Selectboard in each member town. Debt may be incurred by the District, if approved by the member towns in accordance with the Committee’s chosen method under MGL, Chapter 71, Section 16 (d) or Section 16 (n).

SECTION VIII

Transportation

Transportation to and from the District Schools and any other transportation for District School purposes shall be the responsibility of the District and its cost shall be apportioned to the member towns as an operating expense, as described in VI (B).
SECTION IX

Provision for Amendment

(A) This Agreement may be amended from time-to-time in the manner hereinafter provided, but no such amendment shall be made which shall substantially impair the rights of the holders of any bonds or notes or other indebtedness of the District then outstanding, or the rights of the District to procure the means for payment thereof, provided that nothing in this section shall prevent the admission of a new town, or towns, to the District and the reapportionment accordingly of that part of the capital costs represented by bonds or notes of the District then outstanding and of interest thereon.

(1) A proposal for amendment may be initiated by a signed petition bearing the signatures of ten (10) percent of the registered voters as certified by the Town Clerk of any one of the member towns or by vote of a majority of all members of the Committee.

(2) Any such proposal for amendment shall be presented to the Secretary of the Committee who shall mail or deliver a notice in writing to the Selectboard of each of the member towns that a proposal to amend this Agreement been received and shall enclose a copy of such proposal (without the signatures in the case of a proposal by petition). The Selectboard in each member town shall include in the warrant for the next annual or special town meeting called for the purpose an article stating the proposal.

(3) When a majority of the member towns, by majority vote at such annual or special town meeting, shall have approved the proposal for amendment and the amended Agreement has been approved by the Commissioner of Elementary and Secondary Education (hereinafter referred to as the “Commissioner”), said amendment shall be adopted thereby and thereupon become a part of this Agreement.

SECTION X

Admission of Additional Member Towns

(A) By an amendment of this Agreement adopted under and in accordance with Section IX above, any other town or towns may be admitted to the District upon adoption as therein provided of such amendment and upon acceptance at a special or annual town meeting by a majority vote by the town or towns seeking admission of the Agreement as so amended, acceptance by a minimum of two-thirds (2/3) of the member towns, each by majority vote, and also upon compliance with such provisions of law and regulations [e.g., Code of Massachusetts Regulations (hereinafter referred to as “CMR”); i.e., CMR, 41.03, as amended] as may be applicable and such terms as may be set forth in such amendment.
(B) The Committee, prior to the admittance of a new member town, will have the option of establishing an additional cost to that new member town to be included in the District. This additional cost will be clearly articulated to a Regional Planning Committee of the potential new member town(s) and will be made clear to the voters prior to that new member town’s vote on admission to the District.

(C) A new member town may be admitted to the District as of July 1 of any fiscal year, provided that all requisite approvals for such admission, including the Commissioner’s approval, shall be obtained no later than the preceding December 31.

(D) The new member town will immediately be entitled to three (3) Committee members appointed by the process outlined in Section II (C) Vacancies. Two (2) of the three (3) Committee members will be elected at the next biennial election and the third member will be elected at the following biennial election to provide for a rotation of Committee members.

SECTION XI

Withdrawal of Member Towns

(A) Limitation

The withdrawal of a member town from the District may be affected by an amendment to this Agreement in the manner hereinafter provided by this section. Any member town seeking to withdraw shall, by vote of an annual or special town meeting, request the Committee to draw up an amendment to this Agreement setting forth the terms by which such town may withdraw from the District, provided (1) that the town seeking to withdraw shall remain liable for any unpaid operating costs which have been certified by the District Treasurer to the Treasurer of the withdrawing town, including the full amount so certified for the year in which such withdrawal takes effect and (2) that the said town shall remain liable to the District for its share of the indebtedness, other than temporary debt in anticipation of revenue, of the District outstanding at the time of such withdrawal, and for the interest thereon, to the same extent and in the same manner as though the town had not withdrawn from the District, except that such liability shall be reduced by any amount which such town has paid over at the time of withdrawal and which has been applied to the payment of such indebtedness.

(B) Procedure

The Town Clerk of the town seeking to withdraw shall notify the Committee in writing that such town has voted to request the Committee to draw up an amendment to the Agreement (enclosing a certified copy of such vote). Thereupon, the Committee shall draw up an amendment to the Agreement,
setting forth such terms of withdrawal as it deems advisable, subject to the limitation contained in Section XI (A). The Secretary of the Committee shall mail or deliver a notice in writing to the Selectboard of each member town that the Committee has drawn up an amendment to the Agreement providing for the withdrawal of a member town (enclosing a copy of such amendment). The Selectboards of the non-withdrawing member towns shall include in the warrant for the next annual or special town meeting, called for the purpose of an article, the terms of withdrawal. Such amendment shall become effective on a July 1 no less than one full year after the approval by the non-withdrawing member town, acceptance by each town to be a majority vote at a town meeting as aforesaid, and after approval of the Commissioner, no later than the preceding December 31.

(C) Obligations of Member Towns

In addition to other terms and requirements which the Committee shall include in the amendment, the member town(s) seeking to withdraw from the District will be responsible for the following: (1) payment of all operating costs for which member towns are liable as a member of the District; (2) continuing payments beyond the time of withdrawal from the District for each member town's share of the indebtedness of the District which is outstanding at the time of withdrawal, and for interest thereon, to the same extent and in the same manner as though each town had not withdrawn from the District; and (3) other liabilities incurred during all times that each town was a member of the District (e.g., OPEB – Other Post-Employment Benefits). All expenses related to the withdrawal of a member town from the District will be borne by the member town which initiates withdrawal from the District.

(D) Approval of Withdrawal

A request to withdraw shall become effective only if the amendment to the Agreement is approved by a majority vote of the Committee, is approved by majority vote at an annual or special town meeting in two-thirds (2/3) of the member towns, is approved by the Commissioner, and the withdrawal from the District can only become effective on a July 1 no less than one full year after the completion of these requirements.

(E) Cessation of Terms of Withdrawing Town's Members

Upon the effective date of withdrawal from the District, the terms of office of all Committee members from the withdrawing member town serving on the Committee shall terminate.

(F) Payments of Certain Capital Costs Made by a Withdrawing Town

Money encumbered from the member towns for payment of obligations (as outlined in Section XI (C) above) shall be used only for such purpose and until so
used shall be deposited in a trust which is established at the time of a member town's withdrawal.

(G) **Division of Assets**

All member towns will be entitled to any assets that need to be divided between the towns to be negotiated between the Committee and Selectboard.

**SECTION XII**

**Regional Amendment Review**

(A) Recognizing that over time circumstances often change, and intending that this Agreement should continue to serve the best interests of the member towns, the Committee shall, at least at five-year intervals, establish an ad hoc study group composed of knowledgeable persons to study this Agreement and report to the Committee as to whether or not any changes to this Agreement might be beneficial in light of the then prevailing conditions. The Committee shall give any such ad hoc study group's report due consideration, but may exercise its discretion as to whether or not it will implement any of the group's recommendations.

(B) This ad hoc Regional Agreement Advisory Committee will be composed of four (4) members of the Committee (one (1) from each member town) appointed by the Committee and four (4) members of the member towns (one (1) from each member town) appointed by the respective Selectboards. All members of the Regional Agreement Advisory Committee shall be appointed for a term of one (1) year. The Superintendent and the School Business Administrator shall be ex-officio members of the Regional Agreement Advisory Committee.
IN WITNESS WHEREOF, this Agreement has been executed as of ____________.

Regional School Committee: _________________ Date: ________

____________________ (Chair)

(typed name)

Town of Bernardston: _________________ Date: ________

____________________ (Town Clerk or BoS Chair)

(typed name)

Town of Leyden: _________________ Date: ________

____________________ (Town Clerk or BoS Chair)

(typed name)

Town of Northfield: _________________ Date: ________

____________________ (Town Clerk or BoS Chair)

(typed name)

Town of Warwick: _________________ Date: ________

____________________ (Town Clerk or BoS Chair)

(typed name)

Commissioner of the Department of Elementary and Secondary Education:

____________________ (typed name) Date: ________
Pioneer Valley Regional School District

HEART/Regional Study Committee

Changes/Amendments to Regional Agreement
March 7, 2019

What is a Regional Agreement?

A Regional Agreement is a document which describes how a regional school district functions and its legal and financial intersection with the member towns.

When was the Pioneer Valley Regional School District Regional Agreement Written?

The Regional Agreement was first adopted on March 28, 1991 and later amended on July 1, 1999

Why Are Amendments Necessary?

1) Education Reform Act of 1993 – updated and changed laws relating to school districts; 2) Department of Elementary and Secondary Education (DESE) – added and modified regulations relating to school districts; and 3) opportunity to update Agreement to meet current interests/practices of the District

Process for Amendments

Selectboards appoint ad hoc Regional Study Committee (HEART Committee) to study issues and recommend amendments to the School Committee → School Committee reviews Study Committee’s recommendations and votes to support (or make further changes) → amendments are reviewed by District/Town Counsels and DESE → voters in all member towns vote on School Committee recommendations (3 of 4 towns required to pass) → Commissioner of DESE determines final approval

Regional Study Committee Recommended Changes
• Current Regional School Committee has 12 members (3 each from the 4 member towns) – one Committee member-at-large will be added (total of 13) to create an odd number to prevent tie votes [Section II (A) (1)]
• The Chair and Vice Chair of the School Committee must be rotated every two years. [Section II (A) (4)]
• School Committee members may not serve more than 2 consecutive uninterrupted terms. [Section II (B) (3)]
• A temporary vacancy on the School Committee will be filled by vote of the Selectboard members and the remaining Committee members from the town which has the vacancy. [Section II (B) (3)]
• The School Committee is given the responsibility to determine which grades will be in which schools. [Section III (A)]
• There is a 10-month requirement to conduct a 5-year projected feasibility study initiated at least ten (10) months in advance of the proposed closing which must be followed in order to close a school. This process includes an ad hoc committee comprised of members of each member town appointed by the Selectboard (2) and School Committee (1). [Section IV (C)]
• If a member town’s only elementary school is closed, the District is required to pay 50% of the budgeted costs to maintain a fully functioning school for 3 years. If the closed building is sold or fully repurposed prior to the end of this three (3) year period, the District will no longer be responsible for this compensation. [Section IV (C) (6)]
• The budget process has been updated to meet DESE regulations, but has not been substantively changed. [Section V]
• The apportionment (i.e., assessment to the member towns) also includes updated and clarifying language but has not be substantively changed. [Section VI] Apportionment (i.e., assessments) is now based on Foundation enrollment (includes all in-district, school choice-out, charter, and special education out-of-district students vs. just in-district students; i.e., all students for which the District is responsible. [VI (B)]
• Capital costs are now more clearly defined to “include building modifications to the structure and systems that exceed $10,000...” [Section VI (C)]
• A member town which has no elementary school is not obligated to pay any capital costs in an elementary school where its students attend. [Section VI (C) (2)]
• The School Committee must approve of any special funds raised in a member town to be used specifically in that member town’s elementary school. [Section VI (E)]
• There is new language required by law spelling out how the District can incur debt. This does not substantively change current practice. [Section VII]
• There is new clarifying language related to the admission of a new member town. [Section X]
• There is a new section which describes the process and specific obligations for a member town to withdraw from the District. [Section XI]
• A new section has been added requiring the School Committee to review this Regional Agreement every 5 years by setting up an ad hoc committee to make recommendations. [Section XII]
Amending the Pioneer Valley RSD Regional Agreement
HEART Committee
to
Regional School Committee 3/6/19

What is a Regional Agreement?

* Describes how a regional school district functions

and

* Describes how the district & the member towns intersect legally and financially
Included in Regional Agreements - 1

* Type of School District
* Functions & Responsibilities of School Committee
* Who are the Students in the District?
* Location & Lease of the schools
* How is the Budget Built and Approved?
* How are the Assessments Apportioned to Towns?
* How does the District Incur Debt?

Included in Regional Agreements - 2

* Who is Responsible for Student Transportation?
* How is this Regional Agreement Amended?
* How can New Towns be Included in the District?
* How can Member Towns Withdraw from the District?
* How & When Does the Regional Agreement get Reviewed?
Why is an Update Needed?

* Original Regional Agreement – 1991

* Amended in 1999

* Original Agreement approved prior to 1993 Education Reform Act

HEART Committee Reviewed
Current Regional Agreement

A) Update to current reality – RSC:
   * Policies
   * Practices
   * Issues

B) Conform to Ed Reform Act & Amended Laws

C) Conform to DESE Regulations
“Housekeeping” Changes

* “pupil” → “student”

* “K – 12” → “Pre-K – 12”

* Towns do not pay assessments “by check”

* “Board of Selectmen” → “Selectboard”

Proposed Amendments - 1

* Add 13th School Committee (RSC) member
* Require Chair and Vice Chair of RSC to be rotated every 2 years
* RSC members may not serve more than 2 consecutive terms
* Vacancy on RSC appointed by Selectboard & remaining RSC members from that town
Proposed Amendments - 2

* RSC responsible for which grades are in which schools
* 10-month/5 year feasibility study required before a school can be closed – ad hoc committee
* District required to pay 50% maintenance expenses for up to 3 years if school closed
* Town with no elementary school does not have to pay capital expenses in school where students go
* Budget process language updated but not changed

Proposed Amendments - 3

* Assessment language updated but not changed
  * Use of “foundation” enrollment vs. “in-district” enrollment
* Incurring of debt language updated but not changed
* “Capital” redefined to “include building modifications to the structure and systems that exceed $10,000”
* RSC must approve any “special funds” raised by a town
Proposed Amendments - 4

* There is new language clarifying how a new town can become a member of the District
* There is updated language to clarify the process & responsibilities of a town seeking to withdraw from the District
* A new section requires the RSC to review the Regional Agreement every 5 years

Community Involvement

* HEART Committee includes representatives of all 4 towns
* Heart Committee includes members of the RSC, Selectbds, FinComs & citizens
* HEART meetings open to public – newspaper coverage
Approval Process - 1

* HEART Committee voted to approve amended Regional Agreement (2/13/19)
* RSC votes final version
* Proposed amended Regional Agreement reviewed by DESE, District & Town Counsels
* Selectboards place article on warrant
* Voters approve or disapprove amended Regional Agreement

Approval Process - 2

* If approved by 2/3 of towns (i.e., 3), signed Agreement & certified votes sent to DESE
* DESE Commissioner approves amended Agreement provided it is in compliance
HEART Committee Members

HEART/Regional Agreement Amendment Committee
- Julia Blyth – Northfield Selectboard
- Alan Genovese – Warwick Citizen
- Cheryl George – Northfield PTO Chair
- Michele Giarusso – Leyden Town Coordinator
- Robert Keir – Bernardston Citizen
- Jess Marshall - Warwick School Committee
- Tony Mateo – Northfield FinCom
- Sue O'Reilly-McFae – Warwick School Committee
- Jean Page – Bernardston Citizen
- Shalee Pratt – Bernardston Citizen
- Ginger Robinson – Leyden FinCom
- Tom Wyatt – Warwick Citizen

MARS CONSULTANTS
(MA Association of Regional Schools)
- Steve Hemman
- Mac Reid

Questions & Comments
HEART Committee

Deliverables

1. Regional Agreement
   1. Current Agreement
   2. Mark up
   3. Clean—wording that is deleted is gone and new wording in red, original language is in black
   4. Final
   5. Power Point
   6. Summary of Changes

2. School Choice
   a. School Choice out survey
      1. Grades K-6
      2. Grades 7-12
   b. Results of out Survey
      1. Grades K-6
      2. Grades 7-12
   c. School Choice In Survey
      1. Grades K-6
      2. Grades 7-12
   d. Results of in Survey
      1. Grades K-6
      2. Grades 7-12

3. Central Office—Excel Sheet

4. School Closings
   a. Leyden
   b. Bernardston
   c. Northfield
   d. Warwick
June 30, 2018

The Abrahams Group
52 Flanagan Drive
Framingham, MA 01701-3745
012-34-5060

Mr. Bernard Kubiak
Interim Town Administrator
Town Hall
69 Main Street
Northfield, MA 01360

Invoice 1

For professional services to the Pioneer Valley Regional School District for the Efficiency Project from project inception through June 30, 2018. We are about 10% complete on the project. This invoice represents 10% of the contract.

Total Fees and Expenses $2,000.00
DECE VENI

AUG 14

2018

By: July 31, 2018

The Abrahams
Group
52 Flanagan Drive
Framingham, MA
01701-3745
012-34-50
60

Mr. Bernard Kubiak Interim
Town Administrator Town
Hall 69 Main Street
Northfield, MA 01360

Invoice
2

For professional services to the Pioneer Valley Regional School District for the Efficiency Project from July 1, 2018 through July 31, 2018. We are about 20% complete on the project. This invoice represents 20% of the contract.
Total Fees and Expenses
Less Previously Billed This Invoice

$4,000.00

2,000.00 $2,000.00

September
15, 2018

DECEIVED

The Abrahams
Group
52 Flanagan Drive
Framingham, MA
01701-3745
012-34-50
60

SEP 19
2018

Mr. Bernard Kubiak Interim
Invoic

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through September 14, 2018. We are about 30% complete on the project. This invoice represents 30% of the contract.

Total Fees and Expenses Less
Previously Billed This
Invoice

$6,000.00

4,000.00 $2,000.00

1030

00

26-199-lala-53816!

October 8,
2018

129

1
The Abrahams
Group
52 Flanagan Drive
Framingham, MA
01701-3745
012-34-50
60

OCT 09
2018

Mr. Bernard Kubiak
Interim Town Administrator
Town Hall 69 Main
Street Northfield,
MA 01360

Invoice 4

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through October 5, 2018. We are about 50% complete on the project. This invoice represents 50% of the contract.

Total Fees and Expenses
Less Previously Billed This Invoice

$10,000.00

6,000.00 $4,000.00

November 8, 2018

The Abrahams Group
52 Flanagan Drive
Framingham, MA
01701-3745
012-34-50
60

Mil Bernard Kubiak
Interim Town Administrator
Town Hall 69 Main Street
Northfield, MA 01360

Invoice
5

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through November 2, 2018. We are about 70% complete on the project. This invoice represents 70% of the contract,

Total Fees and Expenses Less
Previously Billed This
Invoice
$14,000.00
10,000.00
0
$4,000.00
00

de
ec

26-199-19962 - 53000 1220

4000 in
December 26, 2018

The Abrahams Group
52 Flanagan Drive Framingham, MA 01701-3745
012-34-5060

Mr. Bernard Kubiak Interim Town Administrator Town Hall 69 Main Street
Northfield, MA 01360

Invoice 6

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through December 21, 2018. We are about 90% complete on the project. This invoice represents 90% of the contract.

Total Fees and Expenses Less Previously Billed This Invoice $18,000.00
14,000.00 $4,000.00

Fund: OL Account 31056
ACCOUNT #: 26-199-19962-5300 ACCOUNT NAME: Community Compact grant
-/220 TOTAL: 1 50012

DATE: 3/21/19 SIGNATURE: _Gllamnes
DEPT. HEAD: Floyd Dunnell

BILL SCHEDULE

To The Town Accountant:
The following bills have been approved for payment from the account indicated above and you are requested to place them on a warrant for payment.

INVOICE #
CLASS#
VENDOR NAME The Abrahams Group
INV. DATE AMOUNT
03/21/19 $1,500.00
TOTAL:
$1,500.00
March 21, 2019

The Abrahams Group
52 Flanagan Drive Framingham, MA 01701-3745
012-34-5060

Ms. Andrea Llamas
Town Administrator Town Hall 69 Main Street Northfield, MA 01360

Invoice 7

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through March 21, 2019. We have substantially completed our work for the HEART Committee. We will submit the final $500 upon submission of our work products.

Total Fees and Expenses Less Previously Billed This Invoice
$19,500.00
18,000.00 $ 1,500.00

ACCOUNT#: 
DATE: 4/1/19   SIGNATURE: Orlamere
ACCOUNT NAME: Community Compact grant

DEPT. HEAD: Andrea Llamas
SIGNATURE:

BILL SCHEDULE

To The Town Accountant:
The following bills have been approved for payment from the account indicated above and you are requested to place them on a warrant for payment.

INVOICE #
CLASSH
VENDOR NAME Cate Woolner
HEART /Community Compact grant
INV. DATE AMOUNT | 03/28/301 $650.00
120618

TOTAL:
$650.00

Invoice
11/19/18 Attend HEART meeting

11/21/1
8
Prepare preliminary draft agenda for 12/5

1.5 hours @ $75/hr.

75 hours @ $75/hr. 1.5 hours @ $75/hr. 75 hours @ $75/hr.

11/28/18 Attend HEART planning meeting for 12/5

12/5/1
8
Set up and prep for public forum

12/5
/18

Moderate Public Forum

2.5 hrs. @ $125/hr.

TOT
AL:
$650.00

12/6/1
8

Thank-you

Phil

Per. my email HEART reimbursement away 32011 malled Bledig

BELA

TOWN OF NORTHFIELD

11'11?11'. Northfieldma.gov
March 26, 2019

Cate Woolner 61 Linden Ave. Northfield, MA 01360

Dear Cate,

Our apologies for the delay in processing your invoice for services connected to the HEART Committee.

Enclosed is a W-9 form our accountant, Phil Gilfeather-Girton, has requested for process.

Please fill out and return to Town Administrator Andrea Llamas or myself so we may re-submit for payment.

Best Regards,

CanchalWud

Sandra L. Wood Town Secretary

Thanks
ACCOUNT #: 26-199-19962-53800-1220

TOTAL:

TOTAL:

500w

ACCOUNT NAME: Reg Services Study Comm
Compact gran DATE: 4/23/19

DEPT. HEAD: Andrea Llamas

SIGNATURE:

ablemer

BILL SCHEDULE

To The Town Accountant:
The following bills have been approved for payment from the account indicated above and you are requested to place them on a warrant for payment.
INVOICE #
CLASS#

VENDOR NAME The Abrahams Group-Final

HEART /Community Compact grant
INV. DATE AMOUNT 04/17/19 $500.00
TOTAL:
$500.00

April 17,
2019

The Abrahams
Group
52 Flanagan Drive
Framingham, MA
Ms. Andrea Llamas  
Town Administrator  
Town Hall 69 Main  
Street Northfield,  
MA 01360

Invoice
8

For professional services to the Pioneer Valley Regional School District for the Efficiency Project through April 17, 2019. We have completed our work for the HEART Committee.

Total Fees and Expenses Less
Previously Billed
This
Invoice

$20,500.00

19,500.00 $  500.00