



Farmington River Regional School District

2024 – 2025 School Year Calendar

<p>July 2024</p> <table border="1"> <thead> <tr><th>S</th><th>M</th><th>Tu</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr> <tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr> <tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr> <tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr> <tr><td>28</td><td>29</td><td>30</td><td>31</td><td></td><td></td><td></td></tr> </tbody> </table>	S	M	Tu	W	Th	F	S		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				<p>7/04 H - Independence Day</p> <p>0 days of school</p>	<p>1/1 H - New Year's Day (No School)</p> <p>1/20 H - Martin Luther King Jr. Day (No School)</p> <p>21 days of school</p>	<p>January 2025</p> <table border="1"> <thead> <tr><th>S</th><th>M</th><th>Tu</th><th>W</th><th>Th</th><th>F</th><th>S</th></tr> </thead> <tbody> <tr><td></td><td></td><td></td><td>1</td><td>2</td><td>3</td><td>4</td></tr> <tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>31</td><td></td></tr> </tbody> </table>	S	M	Tu	W	Th	F	S				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31								
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Farmington River Regional School District
Superintendent Work Agreement

This agreement between the School Committee of the Farmington River Regional School District (hereafter “the Committee”) and Timothy Lee (hereafter “the Superintendent”) shall express the terms of employment as Superintendent of the Farmington River Regional School District effective July 1, 2023.

1. TERM

The term of this agreement shall be three years, commencing on July 1, 2023 and ending on June 30, 2026.

2. DUTIES

The Superintendent shall perform the duties of same-lead administrator of the school district, with responsibilities consistent with those prescribed by state law and school committee policy.

3. LICENSE

The superintendent shall maintain a valid and current superintendent’s license issued by the Massachusetts Department of Elementary and Secondary Education throughout the term of this agreement.

4. COMPENSATION

The superintendent shall be compensated \$55,000 per year with pay periods consistent with those of other district employees. The superintendent shall not be eligible for health or other insurance. The superintendent shall not be eligible for sick or personal time or other “fringe benefits” except as specified in sections 6, 7 and 9 below. On or before May 1 of 2024 and 2025, the superintendent and chair of the school committee shall meet to discuss changes to the superintendent’s annual salary for the subsequent year. The superintendent’s salary may not be reduced during the term of this agreement.

5. WORK DAYS/WORK WEEK

The superintendent shall be expected to work 94 days (approximately 2 days per week) in a fiscal year. On or about September 1 of each year, the superintendent shall identify a work schedule of days “in office.” This schedule shall be shared with the school administration and with the chair of the school committee. This work schedule may be amended as the needs of the school indicate or at the direction of the Committee.

6. VACATION PERIODS

The superintendent may select to use two weeks during the calendar year as “vacation” when he is not required to be “in office” and when responsibilities for district oversight may be delegated to another administrator. This provision does not reduce the total work days expectation as described in section 5.

7. REMOTE WORK

The superintendent may identify up to 10 of the 94 annual work days as remote work days. As feasible, the superintendent shall provide at least 1 day of advance notice to school administration when a remote work day is to be used.

8. ADDITIONAL WORK DAYS

In the event that school district or Committee needs require the superintendent to work in excess of the 94 days identified in section 5, the superintendent will be compensated at a daily rate of \$550. Additional work days will require prior consent of the Committee.

9. PROFESSIONAL DEVELOPMENT

The Superintendent may participate in up to three full days of offsite professional development during a fiscal year. These days shall be considered work days. As feasible, the superintendent will seek pre-approval from the Committee before participating in professional development as covered by this provision.

10. MILEAGE REIMBURSEMENT

The district shall reimburse the superintendent for mileage for use of personal vehicle for work-related travel for professional meetings. Reimbursement shall be made at the rate set by state and federal guidelines. Total reimbursement for superintendent travel shall not exceed \$XX in a fiscal year.

11. EVALUATION

The Committee shall evaluate the performance of the superintendent annually using the DESE superintendent evaluation instrument or another instrument recommended by MASC, MASS, or other professional or governmental bodies.

12. TERMINATION

The Committee or the Superintendent may terminate this agreement at any time during the term of the agreement by providing ninety (90) days advance written notice of intent to terminate. The Committee preserves the right to dismiss the superintendent with less than 90 days notice during the first 90 days of employment or at any time during the term of the agreement provided just cause exists.

13. AMENDMENT

This agreement may be amended at any time during the term by written request of the superintendent or the committee.

Agreed,

MONTH	Days Worked	# Days/Month	Running total
July 2023	7/3, 7/5, 7/10, 7/12 (.5), 7/14, 7/17, 7/19, 7/24, 7/26, 7/27 (.5), 7/31	10	10
August 2023	8/2 (.5R), 8/8 (.5R), 8/14, 8/15 (.5), 8/16, 8/17, 8/20, 8/23, 8/24 (.5), 8/28, 8/29, 8/30, 8/31	11	21
September 2023	9/5, 9/6, 9/7, 9/11 (1.5), 9/13, 9/14, 9/18, 9/20, 9/22, 9/25, 9/27, 9/28	12.5	33.5
October 2023	10/2, 10/4, 10/5, 10/10, 10/12, 10/16, 10/17 (1.5), 10/20, 10/23, 10/25, 10/30	11.5	45
November 2023	11/1, 11/3, 11/6, 11/7, 11/9 (.5), 11/13, 11/15, 11/17 (.5), 11/20, 11/21, 11/27, 11/29	11	56
December 2023	12/4 (1.5), 12/6, 12/7, 12/8, 12/11, 12/13, 12/18, 12/20 (1.5), 12/26 (.5R)	9.5	65.5
January 2024	1/2, 1/3, 1/4 (.5R 7D) 1/8 (1.5), 1/10, 1/11 (.5 Lee mtg + van run), 1/17, 1/18, 1/22, 1/23, 1/24, 1/29, 1/31	12.5	78
February 2024	2/2 (.5R), 2/5, 2/7, 2/9 (.5 van runs) 2/12, 2/13, 2/21 (.5R), 2/26 (.5R) 2/28 (.5R)	6	84
March 2024	3/1 (.5R), 3/2 (.5R), 3/4 (1.5), 3/6, 3/11, 3/12, 3/13, 3/15 (.5), 3/18, 3/19 (.5), 3/20, 3/25, 3/27	11.5	95.5
April 2024			
May 2024			
June 2024			



FARMINGTON RIVER ELEMENTARY SCHOOL

Otis & Sandisfield, MA



SCHOOL CHOICE

WELCOMING NEW STUDENTS FOR THE 2024 - 2025 SCHOOL YEAR!

ACADEMIC EXCELLENCE

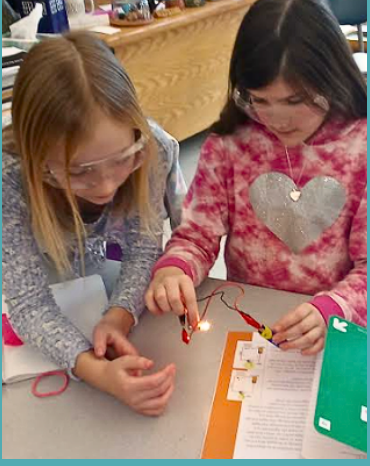
Rigorous core curriculum designed to challenge and inspire young minds that includes the arts, music, instructional technology, physical education and health.

EXPERIENCED FACULTY

Highly qualified, caring and experienced educators committed to student success averaging 11+ years dedicated specifically to Farmington River Elementary.

SAFE ENVIRONMENT

Priority on creating a safe, inclusive, and supportive school community to ensure the overall well-being of all students and staff.



SMALL CLASS SIZES

Personalized attention with small student-to-teacher ratios and individualized instruction to meet the unique needs of every child.

EXTRACURRICULAR ACTIVITIES

Opportunities to foster teamwork, leadership skills, and personal growth through participation in a wide range of after school clubs and activities.

ACTIVE PTA & COMMUNITY

Engaged and collaborative relationship with community partners working hand-in-hand with teachers and staff to provide student and family learning opportunities.

Photos courtesy of Michael Flower



WE'RE CLOSER THAN YOU THINK!

- 18 min. from Lee
- 25 min. from Great Barrington
- 22 min. from Becket
- 18 min. from Blandford



CONTACT US TO SCHEDULE A TOUR!

555 North Main Road
P.O. Box 679
Otis, MA 01253

413-269-4466

www.frrsd.org

School Committee Meeting – 4/1/2024

FY24 Budget Update

Total Approved Operating Budget: \$4,895,205

Total Expenditures as of 3/27/2024: \$3,187,148 or 65% of the total budget spent to date

School Choice:

The following offsets were planned/expended:

Expense	Planned	Expended to Date
Classroom Curriculum Supplies	\$20,000	\$5,516.84
Library Materials	\$1,000	\$0.00
Nature’s Classroom	\$6,000	\$0.00
Payroll Expenses	\$135,000	\$0.00
Professional Development	\$8,000	\$0.00
SN Contracted Services	\$37,000	\$0.00

Total Planned Spend: \$207,000

Balance to Spend/Reallocate Expenses: \$201,483.16

Account Balance at beginning of FY24 - \$249,617

FY24 Revenues to Date: \$70,566

Current School Choice Balance: \$314,666

Grant Balances:

ESSER III - \$89,326

- Continue to pay for after school program through year-end - \$16,000
- Summer program - \$40,000
- September – Soc Emotional Training – Invoice for entire year

Grant	FY23 Balance	FY24 Balance
Title I (paras and supplies)	\$0.00	\$7,859
Title II (para salaries)	\$360	\$3,288
Title IV (technology and paras)	\$10,000	\$10,000
SPED 240 (paras and contract services)	\$0.00	\$33,500
SPED 262 (contracted PD and supplies)	\$4,209	\$2,160

ADF: WELLNESS POLICY

Category: Instruction

File: ADF

Farmington River Regional School District

1st Reading: 04-01-2024

2nd Reading:

Adopted:

Revised:

PURPOSE AND GOALS:

The Farmington River School Committee recognizes the relationship between student well-being and student achievement. Therefore, the school district has developed a comprehensive district wellness program that provides developmentally appropriate and sequential nutrition and physical education, including opportunities for physical activity. The wellness program will be implemented in a multidisciplinary fashion and will be evidence-based.

Recognizing a commitment to providing school environments that promote and protect children’s health, well-being, and ability to learn by supporting healthy eating and physical activity, it is the policy of the Farmington River Regional School District that:

- The school district will engage students, parents, teachers, food service professionals, health professionals, and other interested community members in developing, implementing, monitoring, and reviewing district-wide nutrition and physical activity policies.
- All students in grades PK-6 will have opportunities, support, and encouragement to be physically active on a regular basis.
- Foods and beverages sold or served at school will meet the nutrition recommendations of the U.S. Dept. of Agriculture (USDA).
- Qualified Food Service professionals will provide students with access to a variety of affordable, nutritious, and appealing foods that meet the health and nutrition needs of students; will accommodate the religious, ethnic, and cultural diversity of the student body in meal planning; and will provide clean, safe, and pleasant settings and adequate time for students to eat.
- Schools in our district will participate in the National School Lunch Program and will adhere to all federal and state requirements concerning the same.
- Schools are committed to providing nutrition education and physical education to foster lifelong habits of healthy eating and physical activity, and will establish linkages between health education and school meal programs, and with related community services. Programs will be updated and enhanced through curriculum review.

TO ACHIEVE THESE POLICY GOALS:

1. WELLNESS COMMITTEE:

The school district will establish a wellness committee that consists of at least one (1): parent, student, nurse, school food service director, School Committee member, school administrator, physical education/physical activity staff, member(s) of the public, and other community members as appropriate. If available, a qualified, credentialed nutrition professional will be a member of the wellness committee. The School Committee will annually designate a wellness program coordinator(s). Only employees of the district who are members of the wellness committee may serve as wellness program coordinators. Wellness coordinators, in consultation with

the superintendent and the wellness committee, will be in charge of implementation, monitoring, review and assessment of this policy.

2. NUTRITIONAL QUALITY OF FOODS AND BEVERAGES SOLD:

a. School Meals:

Meals served through the National School Lunch & Breakfast Programs will: • be served in clean and safe settings;

- meet, at a minimum, nutrition requirements established by local, state, and federal statutes and regulations;
- offer a variety of fruits and vegetables;
- serve only low-fat (1%) and fat-free milk and nutritionally-equivalent non-dairy alternatives (as defined by USDA); and
- ensure that all of the served grains are whole grain.

To ensure high quality nutritious meals, foods should be served with consideration toward variety, appeal, taste, safety, and packaging. Schools should engage students, through taste-tests of new entrees, in selecting foods sold through the school meal programs in order to identify new, healthful, and appealing food choices.

b. Free and Reduced-priced Meals:

Schools will make available free and reduced meal applications for families who qualify. Schools will make every effort to eliminate any social stigma attached to, and prevent the overt identification of, students who are eligible for free and reduced-price school meals.

c. Meal Times and Scheduling:

Schools:

- will, to the extent possible, provide students with at least 20 minutes to eat after sitting down for lunch and 10 minutes after sitting down for breakfast.
- will not schedule tutoring, club, or organizational meetings or activities during mealtimes, unless students may eat during such activities;
- will provide students access to hand washing or hand sanitizing before they eat meals or snacks
- will take reasonable steps to accommodate the tooth-brushing regimens of students with special oral health needs (e.g., orthodontia or high tooth decay risk).

d. Water:

To promote hydration, free, safe, unflavored drinking water will be available to all students throughout the school day and throughout every school campus. The District will make drinking water available with school meals. In addition, students will be allowed to bring and carry approved water bottles filled only with water with them throughout the day. The district will participate in required Massachusetts Department of Environmental Protection Lead and Copper Sampling Program to ensure all water sources meet (or exceed) required standards.

e. Qualifications of School Food Service Staff:

Qualified Food Services professionals will administer the school meal programs. As part of the school district's responsibility to operate a food service program, professional development for all nutrition professionals in schools will be regularly offered. Staff development programs include appropriate certification and/or training programs for Cafeteria Site Managers and cafeteria workers, according to their levels of responsibility.

f. Sharing of Foods and Beverages:

To the extent possible, students will not be allowed to share their foods or beverages with one another during meal or snack times, given concerns about allergies and other restrictions on some student's diets.

g. Foods and Beverages Sold Individually:

Foods and beverages sold outside of reimbursable school meals (such as through vending machines, cafeteria a la carte lines, fundraisers, school stores, etc.) during the school day shall comply with the Smart Snacks Nutrition Standards; MA Competitive Foods Act of 2012.

h. Elementary Schools:

The school food service lunch program will approve and provide all food and beverage sales to students in elementary schools. Given young children's limited nutrition skills, food in elementary schools will be sold as balanced meals. If available, foods and beverages sold individually will be limited to low-fat and non-fat milk, fruits, and non-fried vegetables.

i. Beverages:

Allowed: water or seltzer water without added caloric sweeteners; fruit and vegetable juices and fruit-based drinks that contain 100% fruit juice and that do not contain additional caloric sweeteners; unflavored or flavored low-fat or fat-free fluid milk and nutritionally-equivalent nondairy beverages (as defined by USDA);

Not allowed: soft drinks containing caloric sweeteners; sports drinks; iced teas; fruit-based drinks that contain less than 100% real fruit juice or that contain additional caloric sweeteners; beverages containing caffeine, excluding low-fat or fat-free chocolate milk (which contain caffeine).

j. Foods:

A food item sold individually:

- will have no more than 35% of its calories from fat (excluding nuts, seeds, peanut butter, and other nut butters) and 10% of its calories from saturated and trans fat combined;
- will have no more than 35% of its calories from added sugars;
- will contain no more than 200mg of sodium per food item; and no more than 480mg of sodium per a-la-carte item (main meal).
- A choice of at least two fruits and/or non-fried vegetables will be offered for sale at any location on the school site where foods are sold. Such items could include, but are not limited to, fresh fruits and vegetables; 100% fruit or vegetable juice; cooked, dried, or canned fruits (canned in fruit juice or light syrup); and cooked, dried, or canned vegetables (that meet the above fat and sodium guidelines), as long as they meet the above foods standards.

k. Portion Sizes:

Limit portion sizes of foods and beverages sold individually to the USDA portion standards and CDC nutrition standards.

l. Snacks:

Snacks served during the school day will make a positive contribution to children's diets and health, with an emphasis on serving fruits and vegetables as the primary snacks and water as the primary beverage. Schools will assess if and when to offer snacks based on timing of school meals, children's nutritional needs, children's ages, and other considerations. The district will disseminate a list of healthy snack items to parents and staff.

m. Fundraising Activities:

All fundraising groups of Lee Public Schools, striving to enrich the curricular and extracurricular activities for our students, will be encouraged to consider and support student's health and school nutrition-education efforts. It is suggested that fundraising sales include items that are not food related and will promote physical activity. The district will disseminate a list of healthy fundraising ideas to parents and staff.

n. Rewards:

Schools will not withhold food or beverages (including food served through school meals) as a punishment. A list of non-food rewards will be made available to parents and staff. Non food rewards will be strongly encouraged.

o. Celebrations:

Schools will limit celebrations that involve food during the school day. Each party should include no more than one food OR beverage that does not meet nutrition standards for foods and beverages. For the health and safety of all staff and students, all food and beverages brought from home for parties MUST be in sealed, store packaging with a clear list of ingredients and allergens. Homemade and unlabeled food is NOT allowed for classroom distribution.

2. NUTRITION AND PHYSICAL ACTIVITY PROMOTION AND FOOD MARKETING:

a. Nutrition Education and Promotion

FRRSD aims to teach, encourage, and support healthy eating by students. Schools should endeavor to provide nutrition education and engage in nutrition promotion that:

- is offered at each grade level as part of a sequential, comprehensive, standards-based program designed to provide students with the knowledge and skills necessary to promote and protect their health;
- is part of not only health education classes, but, to the extent possible, also classroom instruction in all subjects;
- includes enjoyable, developmentally-appropriate, culturally-relevant, participatory activities, such as contests, promotions, taste testing, farm visits, and school gardens;
- promotes fruits, vegetables, whole grain products, low-fat and fat-free dairy products, healthy food preparation methods, and health-enhancing nutrition practices;
- emphasizes caloric balance between food intake and energy expenditure (physical activity/exercise);
- links with school meal programs, other school foods, and nutrition-related community services;
- teaches media literacy with an emphasis on food marketing; and
- includes training for teachers and other staff who support nutrition education and optional activities that faculty/staff can access to learn more and improve their own wellness.

b. Communications with Parents:

The district/school will support parents' efforts to provide a healthy diet and daily physical activity for their children. To the extent possible, the district/school will offer healthy eating seminars for parents, send home nutrition information, and post nutrition tips on school websites. Schools should encourage parents to pack healthy lunches and snacks and to refrain from including beverages and foods that do not meet the above nutrition standards for individual foods and beverages.

The district/school will provide information about physical education and other school-based physical activity opportunities before, during, and after the school day; and support parents' efforts to provide their children with opportunities to be physically active outside of school. Such supports, to the extent feasible, will include sharing information about physical activity and physical education through a website, newsletter, or other take-home materials, special events, or physical education homework.

c. Food Marketing in Schools:

School-based marketing will be consistent with nutrition education and health promotion. To the extent possible, schools will limit food and beverage marketing to the promotion of foods and beverages that meet the nutrition standards for meals or for foods and beverages sold

individually (above). School-based marketing of brands promoting predominantly low-nutrition foods and beverages is prohibited. The promotion of healthy foods, including fruits, vegetables, whole grains, and low-fat dairy products is encouraged.

d. Staff Wellness:

FRRSD highly values the health and well-being of every staff member and will plan and implement activities and policies that support personal efforts by staff to maintain a healthy lifestyle. The Wellness Committee, in concert with the School Business Office, should participate in developing, promoting, and overseeing a multifaceted plan to promote staff health and wellness. The plan should be based on input solicited from school staff and should outline ways to encourage healthy eating, physical activity, and other elements of a healthy lifestyle among school staff.

3. PHYSICAL ACTIVITY OPPORTUNITIES AND PHYSICAL EDUCATION:

a. Integrating Physical Activity into the Classroom Setting

Students will receive a regular amount of daily physical activity (i.e., at least 15 minutes per day to the extent possible of structured or unstructured time). For students to fully embrace regular physical activity as a personal behavior, students need opportunities for physical activity beyond physical education class. Toward that end:

- Classroom health education will complement physical education by reinforcing the knowledge and self-management skills needed to maintain a physically- active lifestyle and to reduce time spent on sedentary activities, such as watching television;
- Physical activity will be incorporated into other subject lessons; and
- Classroom teachers will provide short physical activity breaks between lessons or classes, as appropriate. A list of ideas will be provided to staff. See appendix for additional resources along with subject specific energizers / movement ideas.

b. Physical Education (PE) K-6:

All students in grades K-6, including students with disabilities, special health-care needs, and in alternative educational settings, will receive physical education for a minimum of 135 minutes every two weeks. Students should spend at least 50 percent of physical education class time participating in moderate to vigorous physical activity.

c. Daily Recess

All elementary school students will have at least 15 minutes a day of supervised recess, preferably outdoors, during which schools should encourage physical activity verbally and through the provision of space and equipment. Schools will discourage extended periods (i.e., periods of two or more hours) of inactivity. When activities, such as mandatory school-wide testing, make it necessary for students to remain indoors for long periods of time, schools will give students periodic breaks during which they are encouraged to stand and be moderately active. A list of activities will be disseminated to appropriate staff to assist in incorporating activity in the classroom in the event of indoor recess.

d. Physical Activity Opportunities Before and After School:

All schools will encourage, to the extent possible, extracurricular physical activity programs, such as physical activity clubs or intramural programs. Schools will offer a range of activities that meet the needs, interests, and

abilities of all students, including boys, girls, students with disabilities, and students with special health-care needs.

After-school enrichment programs, to the extent feasible, will provide and encourage - verbally and through the provision of space, equipment, and activities - daily periods of moderate to vigorous physical activity for all participants.

e. Physical Activity and Punishment:

Teachers and other school personnel will not use physical activity (e.g., running laps, pushups) or withhold opportunities for physical activity whenever possible (e.g., recess, physical education) as punishment.

g. Use of School Facilities Outside of School Hours:

To the extent possible, school spaces and facilities will be available to students, staff, and community members before and after the school day, on weekends, and during school vacations. To the extent possible, these spaces and facilities also should be available to community agencies and community organizations offering physical activity and nutrition programs. School policies concerning safety will apply at all times (reference school committee policy KF-R: Community Use of Schools' Facilities/Grounds and Equipment).(sent to school committee)

4. SOCIAL/EMOTIONAL ACTIVITIES:

There is a need across schools, community providers, and out-of-school time partners to support the emerging social-emotional (SEL) needs of children. Increasing incidence of trauma requires that providers have a common language, clear definitions, and a set of evidence-based techniques to work with children in schools and within the community. SEL is an area of ongoing focus for Farmington River Elementary and as such;

- Character education will occur in the classrooms. Lessons will be taken from research-based programs.
- Lessons will be taught to empower students to develop self-regulatory behaviors and coping skills to be used in everyday life. The school will implement the curriculum in the classrooms to address character education, problem solving skills, peer relations, peer medication, bullying, etc.
- Anti-bullying will be addressed through a research-based program per DESE regulations and Chapter 86 of the Acts of 2014, which amended MGL c. 71 section 370 (see district policy on Bullying Prevention).
- Students will be taught and encouraged to follow ADL's (activities of daily living), which include healthy eating, good sleep habits, personal hygiene, etc.
- Students will be taught to recognize and manage their emotions and to be aware of and respond appropriately to the emotions of others. The school will implement activities, role-playing, and curriculum in the classroom to address: bullying, problem-solving, character education, peer medication, etc.
- Teach children and families appropriate methods for relaxation and mindfulness.
- Educate families regarding services and organizations available to them in the county

Find more resources at FRES Wellness Resources Page

5. SUPPORTING (ADDITIONAL) HEALTHY BEHAVIORS:

It is important that, additionally, particular healthy habits are reinforced within and beyond the school walls. As such, Farmington River School will:

- Encourage students to practice proper hygiene daily (showering, tooth brushing, flossing, deodorant, clean change of clothes)
- When necessary, encourage students to wear sunscreen

- Offer a fluoride program to all students in grades 1-6 when available through the Massachusetts department of public health.
- Allow a dental preventist to visit FRES semi-annually to offer cleanings, fluoride treatments and sealants.
- Encourage proper hand washing before eating and after bathroom use
- Offer flu vaccine to students and staff in the fall in concert with the Health Office and the local Department of Public Health.
- Partner with the community to assist with health care, as appropriate. Dental Preventist, Department of Public Health, Local Dental programs (classroom education), Berkshire Health Systems: Advocacy for Access (insurance) & Operation Better Start.

6. MONITORING AND POLICY REVIEW:

a. Monitoring:

The superintendent or designee will ensure compliance with established district-wide nutrition and physical activity wellness policies. In each school, the principal or designee will ensure compliance with those policies.

School food service staff, at the school or district level, will ensure compliance with nutrition policies within school food service areas and will report on this matter to the superintendent. In addition, the school district will report on the most recent USDA School Meals Initiative (SMI) review findings and any resulting changes.

The superintendent or designee will develop a summary report every three years on district-wide compliance with the district's established nutrition and physical activity wellness policies, based on input from schools within the district, and will make the summary available to the public. As possible, annual updates will be offered to the Farmington River School Committee.

b. Policy Review:

To help with the initial development of the district's wellness policies, the school will conduct a baseline assessment of the school's existing nutrition and physical activity environments and policies. The results of this assessments will be compiled to identify and prioritize needs.

Assessments will be repeated tri-annually to help review policy compliance, assess progress, and determine areas in need of improvement. As part of that review, the school district will review our nutrition and physical activity policies; provision of an environment that supports healthy eating and physical activity; and nutrition and physical education policies and program elements. The district, and individual schools within the district, will, as necessary, revise the wellness policies and develop work plans to facilitate their implementation.

*LEGAL REFS.: Healthy, Hunger Free Kids Act, 2010
The Child Nutrition and WIC Reauthorization Act of 2004, Section 204, P.L. 108 -265
The Richard B. Russell National School Lunch Act, 42 U.S.C. §§ 1751 - 1769h The Child Nutrition Act of 1966, 42 U.S.C. §§ 1771 - 1789*

*REGULATIONS: US Department of Agriculture Massachusetts Department of Elementary and Secondary Education, Department of Nutrition, Health and Safety
105 CMR 225.000: Nutrition Standards For Competitive Foods And Beverages In Public Schools*

*CROSS REF.: EFC, Free and Reduced-Cost Food Services
IHAMA, Teaching About Alcohol, Tobacco and Drugs KI, Public Solicitations/Advertising in District Facilities*

APPENDIX:

Active Play Active Learning (elementary level) Brain Breaks

https://drive.google.com/file/d/1kORVhSSs-6mU8RVvD-T2na4AZaEQVZ_6/view?usp=sharing

Classroom Energizers

https://drive.google.com/file/d/10_suNnP36NmMEPDwDruURCiJZvLhgrf/view?usp=sharing

Energizers (courtesy of North Carolina Healthy Schools):

After School Energizers

<https://drive.google.com/file/d/1a-HN2J7v5h4-Emj97JBs2uCW2ADLsC4J/view?usp=sharing>

Healthful Living Energizers

<https://drive.google.com/file/d/1i0B9mEGVi-I5tUXRPQSlcPoHO4icv00O/view?usp=sharing>

K-5 Energizers

<https://drive.google.com/file/d/1WZ0kwJX-PQI8wskY4ehKy9I37Z9SfSR2/view?usp=sharing>

Language Arts Energizers

<https://drive.google.com/file/d/1UhgI9AMGGtfub1gwFykZguycFRcMGCcv/view?usp=sharing>

Math Energizers

https://drive.google.com/file/d/1G63A5Pc_YzyLVCEv-z12bSn6AYwdz9RL/view?usp=sharing

Music Energizers

https://drive.google.com/file/d/1GEZszEAKmhbsa-Z26F4el6l_m5_r-Y0c/view?usp=sharing

Science Energizers

https://drive.google.com/file/d/1CPzN2_uZ_43ztzIUBcV8G_6ieInVLV-D/view?usp=sharing

Social Studies Energizers

https://drive.google.com/file/d/1gC2kuKEMudBt5ZMDS6OM7YRTiL5NRuQ_/view?usp=sharing

Healthy fundraiser ideas (1)

<https://drive.google.com/file/d/1sNqmJXhPvnsCQ9dJ9nekYP-mqlys74zG/view?usp=sharing>

Healthy fundraiser ideas (2)

https://drive.google.com/file/d/1AnqNSdm0NLtK_jRaE3dEHLcRyAof6X8/view?usp=sharing

Healthy snack list

https://drive.google.com/file/d/17rmN0ZIX9PVIa83XVomx7tfETa7Mk4_Z/view?usp=sharing

Indoor Recess 101

<https://www.fns.usda.gov/nslp/national-school-lunch-program-nslp>

Indoor Recess Activities: Playworks

<https://drive.google.com/file/d/1pHpZx1TeadbHQ8aK89-IKEWVDv9TpJPf/view?usp=sharing>

Lee Elementary School Social Emotional Website

<https://sites.google.com/leepublicschools.net/les-sew/home>

National School Lunch Program

<https://www.fns.usda.gov/nslp/national-school-lunch-program-nslp>

Non-food rewards

https://drive.google.com/file/d/1_uh-VWU8IV-DqtVr7L1yOp1X9u6UZip_/view?usp=sharing

Nutrition Standards for Foods in Schools

https://www.cdc.gov/healthyschools/nutrition/pdf/nutrition_factsheet_schools.pdf

Peanut / Tree Nut Letter

https://drive.google.com/file/d/1V9WyWxhHjV_7e-jvinKIFkyWXmVw-DCr/view?usp=sharing

Tri Town Board of Health

<https://www.lee.ma.us/tri-town-health-department>

U. S. Dietary Guidelines for Americans

<http://www.health.gov/dietaryguidelines>

U.S.D.A Regulations for Competitive Foods

<http://www.fns.usda.gov/cnd/About/faqs.htm#Are>

<http://www.fns.usda.gov/cnd/menu/fmnv.htm>

USDA Regulations for School Meals

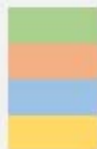
<http://www.fns.usda.gov/cnd/>

USDA School Meals Patterns with Flexibilities

https://fns-prod.azureedge.net/sites/default/files/LAC_03-06-12_0.pdf

	B	C	D	E	F	G	H	I	J	K	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA
			Current		RAAC 1		RAAC 2		RAAC 3		RAAC 4		100% CEY		95% CEY		Eq ASFTB Port		90% CEY		85% CEY		EV %		Eq % CEY
4	Sand: A % of CEY		120.78%		110.89%		108.90%		105.91%		100.93%		100.00%		95.00%		94.91%		90.00%		85.00%		77.37%		77.32%
5	Otis: A % of CEY		62.26%		65.69%		66.38%		67.41%		69.14%		69.46%		71.19%		71.22%		72.92%		74.65%		77.30%		77.32%
7	Sand: CEY - A		-\$266,226		-\$139,505		-\$113,991		-\$139,505		-\$11,933		\$0		\$64,059		\$65,275		\$128,117		\$192,176		\$289,935		\$290,613
8	Otis: CEY - A		\$1,395,696		\$1,268,975		\$1,243,461		\$1,205,189		\$1,141,403		\$1,129,470		\$1,065,411		\$1,064,195		\$1,001,353		\$937,294		\$839,535		\$838,857
10	Sand: (A% - EV%)/EV%		56.11%		43.32%		40.75%		36.89%		30.45%		29.25%		22.79%		22.66%		16.32%		9.86%		0.00%		-0.07%
11	Otis: (A% - EV%)/EV%		-19.46%		-15.02%		-14.13%		-12.79%		-10.56%		-10.14%		-7.90%		-7.86%		-5.66%		-3.42%		0.00%		0.02%
13	Sand: FRSSD Portion of ASFTB		\$1,783		\$1,637		\$1,608		\$1,563		\$1,490		\$1,476		\$1,402		\$1,401		\$1,329		\$1,255		\$1,142		\$1,141
14	Otis: FRSSD Portion of ASFTB		\$1,225		\$1,292		\$1,306		\$1,326		\$1,360		\$1,366		\$1,400		\$1,401		\$1,434		\$1,469		\$1,521		\$1,521
16	Sand: FRRSD Portion of ASFTB as % of IPC		7.56%		6.94%		6.81%		6.63%		6.31%		6.26%		5.94%		5.94%		5.63%		5.32%		4.84%		4.84%
17	Otis: FRRSD Portion of ASFTB as % of IPC		2.98%		3.14%		3.17%		3.22%		3.30%		3.32%		3.40%		3.40%		3.49%		3.57%		3.69%		3.70%
19	Sand: ASFTB % of IPC		16.07%		15.45%		15.32%		15.14%		14.82%		14.77%		14.45%		14.45%		14.14%		13.83%		13.35%		13.35%
20	Otis: ASFTB % of IPC		7.26%		7.42%		7.46%		7.51%		7.59%		7.60%		7.69%		7.69%		7.77%		7.85%		7.98%		7.98%
22	Sand: A - RLMC		\$640,149		\$513,428		\$487,914		\$449,642		\$385,856		\$373,923		\$309,864		\$308,648		\$245,806		\$181,747		\$83,988		\$83,310
23	Otis: A - RLMC		\$858,472		\$985,193		\$1,010,707		\$1,048,979		\$1,112,765		\$1,124,698		\$1,188,757		\$1,189,973		\$1,252,815		\$1,316,874		\$1,414,633		\$1,415,311
25	Sand: ASFTB Change		\$0		-\$146		-\$175		-\$220		-\$293		-\$307		-\$381		-\$382		-\$454		-\$528		-\$641		-\$642
26	Otis: ASFTB Change		\$0		\$67		\$81		\$101		\$135		\$142		\$176		\$176		\$210		\$244		\$296		\$296
28	Sand: % Tax Change		0.00%		-3.85%		-4.63%		-5.79%		-7.73%		-8.09%		-10.04%		-10.08%		-11.99%		-13.93%		-16.90%		-16.92%
29	Otis: % Tax Change		0.00%		2.26%		2.71%		3.39%		4.53%		4.74%		5.88%		5.90%		7.02%		8.16%		9.90%		9.91%
31	Sand: (Tax Levy Limit - Tax Levy) / Tax Levy		12.17%		16.66%		17.61%		19.06%		21.56%		22.04%		24.68%		24.73%		27.44%		30.32%		34.98%		35.02%
32	Otis: (Tax Levy Limit - Tax Levy) / Tax Levy		7.96%		5.58%		5.11%		4.42%		3.28%		3.07%		1.96%		1.94%		0.88%		-0.19%		-1.77%		-1.78%
34	Sand: % Total FRRSD Assessment		40.19%		36.90%		36.24%		35.25%		33.59%		33.28%		31.61%		31.58%		29.95%		28.29%		25.75%		25.73%
35	Otis: % Total FRRSD Assessment		59.81%		63.10%		63.76%		64.75%		66.41%		66.72%		68.39%		68.42%		70.05%		71.71%		74.25%		74.27%
37	Assessment Delta		\$0		\$126,721		\$152,235		\$190,507		\$254,293		\$266,226		\$330,285		\$331,501		\$394,343		\$458,402		\$556,161		\$556,839
38	Sand: % A Change		0.00%		-8.19%		-9.84%		-12.31%		-16.43%		-17.20%		-21.34%		-21.42%		-25.48%		-29.62%		-35.94%		-35.99%
39	Otis: % A Change		0.00%		5.50%		6.61%		8.27%		11.04%		11.56%		14.35%		14.40%		17.13%		19.91%		24.16%		24.18%

COLOR LEGEND



Financial Sustainability Metrics

DESE Metrics

Taxpayer Metrics

Other Metrics Of Interest

ACRONYMS & ABBREVIATIONS

A	Assessment
CEY	Combined Effort Yield
RLMC	Required Local Minimum Contribution
EV	Equalized Valuation
ASFTB	Average Single Family Tax Bill
IPC	Income Per Capita

Sand	Sandisfield
Otis	Otis

Eq	Equal
RAAC	Regional Agreement Advisory Committee
Port	Portion

FINANCIAL SUSTAINABILITY OF THE FARMINGTON RIVER REGIONAL SCHOOL DISTRICT:

UPDATED & EXPANDED VERSION OF 20 FEBRUARY 2024 RESOURCE DOCUMENT

27 March 2024

Updates & Expansions

The purpose of this document is to update and expand the 20 February 2024 resource document, per the prior School Committee vote to i) ratify that document, ii) to update it as more current data became available from MA DESE & DOR, and iii) to add to it additional relevant data from credible sources suggested by School Committee members or other members of the public.

Below is a summary of the changes made herein to the 20 February 2024 resource document:

- FY23 DOR data previously used in the narrative has been replaced by recently released FY24 DOR, to render all data in the narrative FY24 data.
- New appendices with additional data have been added based on suggestions from School Committee members and other members of the public.

The new appendices with additional data are as follows:

- Appendix 8: SBRSD vs. FRRSD FY24 Assessments Per Pupil
- Appendix 9: Surrounding Town FY24 ASFTB & EV
- Appendix 10: DESE FY24 CEY Calculation Methodology
- Appendix 11: Historical CEY & Assessment % of CEY
- Appendix 12: FY24 Otis Levy Limit Form
- Appendix 13: FY24 Sandisfield Levy Limit Form
- Appendix 14: Historical Tax Levy Limit, Ceiling & Percentage of Assessed Value
- Appendix 15: Override Vote History
- Appendix 16: FY23 Education Cost % of Levy Limit & Free Cash History

Introduction

More than thirty years ago the towns of Sandisfield and Otis joined together to solve a common problem. Both towns were educating our elementary students in buildings that were too small and unsuited to modern educational needs. Neither town was large enough to qualify for school building funds from the state. After much discussion, hard work, and town votes, the two towns created a new regional district, the **Farmington River Regional School District (FRRSD)**. This agreement allowed both towns to keep our elementary students close and under local control.

Just over three years ago Sandisfield began exploring alternatives to belonging in the regional district. Sandisfield's concerns focused primarily on academic performance of the elementary school, the **School Committee (SC)** performing its proper role and holding the administration accountable, and financial sustainability of the regional district. While the first two concerns have been resolved, the third has not. As a result, just over a year ago Sandisfield requested an amendment to the **Regional District Agreement (RDA)** to specify terms & conditions under which they could withdraw from the district, if they decided to do so in the future. Consequently, the SC is required to bring forward an amendment to the RDA.

Toward this end, the SC created a subcommittee – the **Regional Agreement Advisory Committee (RAAC)** - to propose to the SC an amended RDA for their consideration and approval. The RAAC recently voted to move consideration and decisions regarding how costs for operating the school district are apportioned to the towns back to the SC. This is a very complicated issue central to the future financial sustainability of the FRRSD. Accordingly, the SC has scheduled a special

meeting on **Feb. 26, 2024 at 6:30 PM in the school library** to begin discussion of how to address this issue. The first step in this process will be to achieve SC consensus on the relevant facts & data underlying the current apportionment method, and to delineate the principal conclusions that can be logically drawn from these facts & data. What follows below is a starting point for the discussion to take place in the Feb. 26 special meeting.

Underlying Relevant Facts & Data

Imagine for a moment that Otis and Sandisfield were one town, called Otisfield. The total assessment submitted to Otisfield by the FRRSD would be distributed to all Otisfield taxpayers according to property assessments. This is the way things are done in all municipal (single town) school districts in Massachusetts.

Per data from the MA **Department of Revenue (DOR)**, in this scenario, the measure of Otisfield’s total assessed property value, known as its **Equalized Valuation (EV)**, would be just over \$1B, with **74%** of that comprised by the current Otis EV, and **26%** comprised by the current Sandisfield EV. Based on this, the Otisfield taxpayers formerly from Otis would pay 74% of the assessment from FRRSD, and those formerly from Sandisfield would pay the remaining 26% of the assessment. *See Appendix 1.*

Today Otis pays **60%** of the FRRSD assessment on their 74% of the aggregate EV, while Sandisfield pays the remaining **40%** of the assessment on their 26% of the aggregate EV. *See Appendix 2.*

The current RDA distributes the total FRRSD assessment to the towns via two different apportionment formulas: one for operating costs, and the other for capital costs. The RDA distributes the operating costs to the towns based on the enrollment split between the two towns – currently at **57%** Otis and **43%** Sandisfield – with no material consideration of relative wealth. As for the much smaller capital costs, the RDA distributes these costs using the average of the enrollment and EV splits, which currently stand at **66%** Otis and **34%** Sandisfield. And this is how the current 60% Otis, 40% Sandisfield split of the FRRSD assessed costs is arrived at. *See Appendix 2.*

When the RDA was put into place in 1992 the **difference** between the EV’s of Otis and Sandisfield stood at **\$153M**, while today it stands at **\$494M**, an increase of **3.2x**. The founders of the FRRSD clearly could not have anticipated this drastic change. Unfortunately, the RDA hasn’t been amended once since its inception 32 years ago. *See Appendix 3.*

Equally, and perhaps even more relevant here, the MA **Department of Elementary & Secondary Education (DESE)** computes each year a parameter known as the **Combined Effort Yield (CEY)** for each MA town. The CEY is DESE’s measure of the maximum the town could reasonably afford and be expected to contribute toward its education expenses. It’s computed using a formula that considers both the EV of the town along with the total income of its residents. Currently the total cost assessed to Otis by the FRRSD is **\$1.4M under** its CEY, at **62%** of its CEY, while Sandisfield is **\$266K over** its CEY, at **121%** of its CEY. In short, Otis is paying significantly less than what DESE has determined it can afford, and Sandisfield is paying significantly more than what DESE has determined it can afford. *See Appendix 4.*

As indicated in the table below, the FRRSD assessment to each town comprises a significant portion of the tax levy the town must raise via property taxes. The last column of this table shows the percentage of the town tax levy attributable to the assessment from FRRSD, which is of course also the percentage of each tax bill the town sends out attributable to FRRSD. We refer to this as the **FRRSD Tax Load (FTL)**. The Sandisfield FTL is 6.05 percentage points higher than the Otis percentage, rendering Sandisfield’s FTL **14.75%** greater than the Otis FTL. *See Appendix 5.*

	FY24 Tax Levy	FY24 FRRSD Assessment	Assessment % of Tax Levy
Otis	\$5,617,441	\$2,302,417	40.99%
Sandisfield	\$3,290,075	\$1,547,397	47.03%

Lastly, DOR provides data each year for each town in MA that indicates the property tax load on its residents. This data is shown in the table below for Otis and Sandisfield, along with a link to the DOR data source.

FY24	SF Values (\$)	SF Parcels (#)	Avg SF Value (\$)	Avg SF TB (\$)	SF TB % of Value	Income Per Capita (\$)	Avg TB % of Income
Otis	711,877,500	1,544	461,061	2,988	0.65	41,157	7.26
Sandisfield	225,784,100	595	379,469	3,791	1.00	23,596	16.07
Ratio (O/S)	3.15	2.59	1.22	0.79	0.65	1.74	0.45
Ratio (S/O)	0.32	0.39	0.82	1.27	1.54	0.57	2.21

SF = Single Family
TB = Tax Bill

Source: https://dlsgateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=AverageSingleTaxBill.SingleFamTaxBill_wRange

The columns highlighted in orange provide, for each town, the **Average Single-Family Tax Bill (ASFTB)**, the **Income Per Capita (IPC)**, and the ratio of the ASFTB to the IPC. The last column can be viewed as a measure of the **Town Tax Load (TTL)** on its residents, as it indicates on average what percentage of resident per capita income is consumed by the town tax bill.

The difference between the Otis and Sandisfield TTL is quite substantial, with the Sandisfield TTL, at **16.07%**, being a factor of **2.21x** greater than the Otis TTL, at **7.26%**. This is of course a direct consequence of the Otis IPC being a factor of 1.74x greater than the Sandisfield IPC, combined with the Sandisfield ASFTB being a factor of 1.27x higher than the Otis ASFTB.

The same DOR data source used above can be used to compare the TTL's of Sandisfield and Otis to those of other nearby Southern Berkshire County towns, as well as to all other towns in MA. Doing so yields the table below:

FY24 Average Single Family Tax Bill % of Income Per Capita				
Town	%	MA Rank	MA percentile	Area Rank
Otis	7.26	10	3%	1
Tolland	10.51	33	9%	2
Becket	10.95	42	12%	3
Blandford	11.11	46	13%	4
Granville	11.72	62	18%	5
Monterey	12.39	90	26%	6
New Marlborough	12.76	108	31%	7
Sheffield	13.05	119	34%	8
Sandisfield	16.07	247	70%	9
Great Barrington	16.58	257	73%	10
Tyringham	18.32	293	83%	11

The local towns listed in this table are ordered by TTL %, from lowest to highest TTL %. Otis has the lowest TTL of all the local towns listed, while Sandisfield has the third highest. Relative to MA, only **3%** of MA towns have a **lower** TTL than Otis, and Sandisfield has a TTL **higher** than **70%** of MA towns.

Perhaps even more relevant, by multiplying, for each town, the ASFTB by the FTL percentage, we obtain the portion of each ASFTB attributable to the FRRSD assessment, as shown in the table below. As can be seen, on average a single-family taxpayer in Sandisfield pays **\$558**, or **46%** more a year towards FRRSD than a single-family taxpayer in Otis.

	FY24 FTL	FY24 ASFTB	FY24 FRRSD ASFTB Portion
Otis	40.99%	\$2,988	\$1,225
Sandisfield	47.03%	\$3,791	\$1,783
Difference (S-O)			\$558
Ratio (S/O)			1.46

Ratification of the Relevant Underlying Facts & Data

It will be important for the SC to ratify the underlying facts & data relevant to the questions of the apportionment method and the financial sustainability of the FRRSD. For this purpose, at a minimum the SC should consider the following questions, among others:

- Are the facts & data presented relevant to the issues of the apportionment method & financial sustainability?
- Are the cited data sources credible?
- Has the data been accurately & clearly transcribed & presented from these sources?
- Are there other credible sources, with additional relevant facts & data, that should be added to what has been considered here?

Establishment of Conclusions Evident from the Relevant Underlying Facts & Data

It will also be important for the SC to delineate conclusions evident from the relevant underlying facts & data. For this purpose, at a minimum the SC should consider the following questions, among others:

- Is the FRRSD, as currently constructed and operated, financially sustainable?
- Is amendment of the apportionment method needed to achieve financial sustainability?
- Should other approaches beyond amendment of the apportionment method be considered?

Next Steps

If the SC concludes that amendment of the apportionment method is needed to achieve financial sustainability of the FRRSD, the SC will move to the next step of determining a framework to evaluate and compare different apportionment methods, and subsequently select the most appropriate alternative. After the SC votes to approve the most appropriate apportionment method, it will next vote to approve a new RDA incorporating this method, after consideration of the other changes to the RDA proposed by the RAAC. The new RDA approved by the SC will then be reviewed by DESE staff for preliminary approval. After this preliminary approval is received from DESE, the SC will then formally transmit the new RDA to each of the two towns, so that each town may vote on its acceptance in a town meeting. If the new RDA is approved by each of the two towns, it will then go to DESE for final approval by the DESE Commissioner. The new RDA will be in effect immediately upon its approval by the DESE Commissioner.

Closing Comments

In closing, we underscore that the data & facts presented here pertain only to the financial sustainability of the FRRSD as a **regional district, as it is currently constructed and operated**. No attempt has been made here to provide a compendium of all the facts & data needed to consider alternatives to a regional district, or to consider alternatives to the way the FRRSD is currently operated and constructed **other than changing the RDA apportionment method**. See *Appendix 6*.

APPENDICES NOW FOLLOW ON THE SUBSEQUENT PAGES

EACH APPENDIX IS A SEPARATE PAGE WITH A LABEL AT THE TOP OF THE PAGE

APPENDIX 1

LA-19
Equalized Valuation Report
SANDISFIELD - 260 2022

Jurisdiction Sandisfield - 260 EQV Year 2022

LA19 (FINAL)

CLASS	Assessed Value	Assessment Ratio	Estimated Full Value
RESIDENTIAL	218,919,010	0.98	223,386,700
OPEN SPACE	0		0
COMMERCIAL	6,174,276	0.99	6,265,400
INDUSTRIAL	238,200	0.98	243,100
PERSONAL PROPERTY	30,134,612	1.00	30,134,600
TOTAL REAL/PERSONAL PROPERTY	255,466,098	0.98	260,029,800
ESTIMATED GROWTH		0.76%	1,976,200
PROPOSED EQUALIZED VALUATION			262,006,000
CHAPTER 121A VALUE			0
2022 FINAL EQUALIZED VALUATION			262,006,000

25.75 %

LA-19
Equalized Valuation Report
OTIS - 225 2022

Jurisdiction Otis - 225 EQV Year 2022

LA19 (FINAL)

CLASS	Assessed Value	Assessment Ratio	Estimated Full Value
RESIDENTIAL	653,481,095	0.93	702,667,800
OPEN SPACE	0		0
COMMERCIAL	15,330,205	0.93	16,458,500
INDUSTRIAL	3,395,700	0.93	3,651,300
PERSONAL PROPERTY	26,812,001	1.00	26,812,000
TOTAL REAL/PERSONAL PROPERTY	699,019,001	0.93	749,589,600
ESTIMATED GROWTH		0.80%	5,996,700
PROPOSED EQUALIZED VALUATION			755,586,300
CHAPTER 121A VALUE			0
2022 FINAL EQUALIZED VALUATION			755,586,300

74.25 %

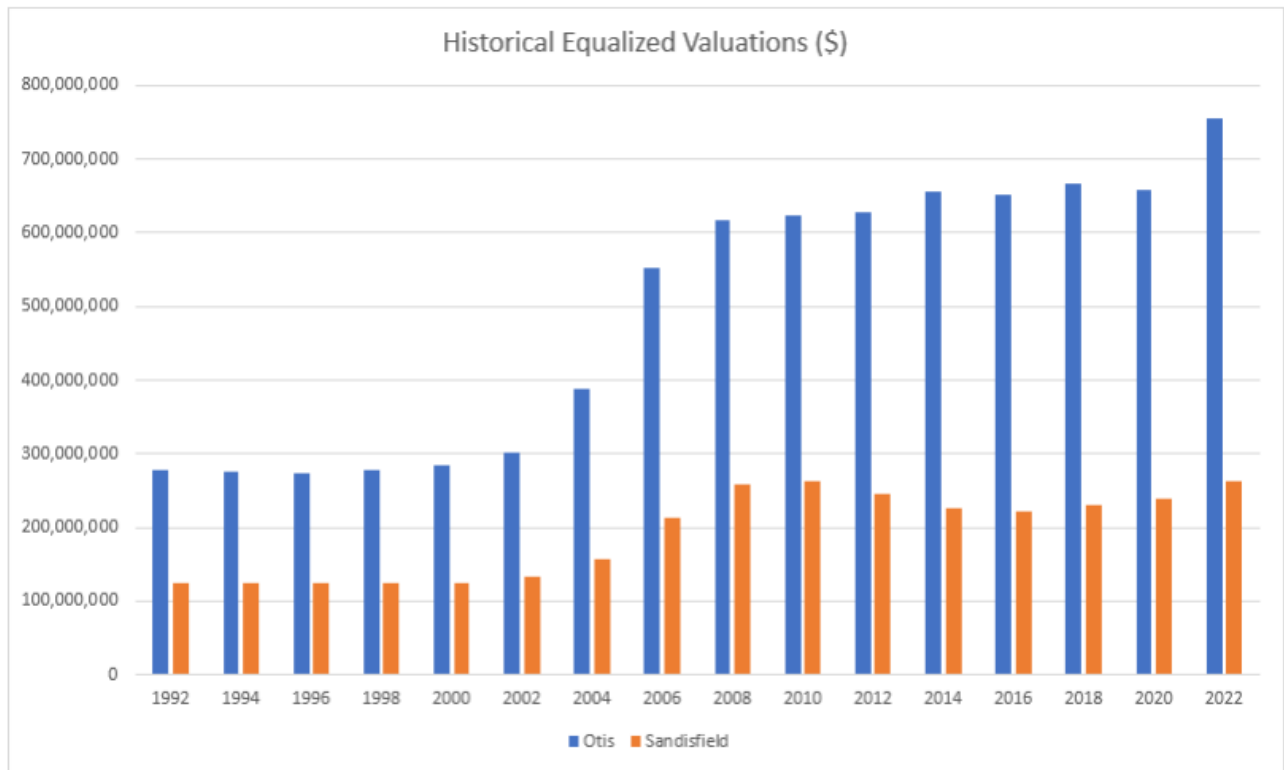
Reference: <https://dls.gateway.dor.state.ma.us/gateway/DLSPublic/LA19>

APPENDIX 2 (page 1 of 2)

Farmington River Regional School District						
FY24 Assessment Calculation - Excess E&D applied to FY23 - Presented 3/23/23						
		2023		2024		
Step 1	Operating Budget	0.41%		4.77%		
	Total Budgeted Expenditures	\$ 4,672,432.00	\$ 4,895,205.00			
	Less Transportation Budget	\$ 399,677.00	\$ 416,104.00			
	Adjusted Operating Budget	\$ 4,272,755.00	\$ 4,479,101.00			
Step 2	Chap 70	\$ 612,111.00	\$ 618,910.00			
	E&D Utilization	\$ 200,000.00	\$ 237,135.00	E&D > 5%		\$134,213.00
	Earnings on Investments	\$ 1,000.00	\$ 2,500.00			
	Local Fees	\$ 1,000.00	\$ -			
	Total Anticipated Revenues	\$ 814,111.00	\$ 858,545.00			
	Balance to be Assessed	\$ 3,458,644.00	\$ 3,620,556.00			
Step 3	FY24 Required Local Contribution			Change		
1a	Otis	\$ 1,370,021.00	\$ 1,443,945.00	\$ 73,924.00		5.40%
1b	Sandisfield	\$ 861,252.00	\$ 907,243.00	\$ 45,991.00		5.34%
	Total	\$ 2,231,273.00	\$ 2,351,188.00			
	Balance to be assessed	\$ 1,227,371.00	\$ 1,269,368.00			
Step 4				2023	2024	
2a	Otis	\$ 703,385.00	\$ 726,459.00	57.31%	57.23%	
2b	Sandisfield	\$ 523,986.00	\$ 542,909.00	42.69%	42.77%	
	Total	\$ 1,227,371.00	\$ 1,269,368.00			
Step 5	Transportation					
	Regular Transportation	\$ 367,677.00	\$ 317,604.00			
	SN Transportation	\$ 32,000.00	\$ 98,500.00			
	Total Transportation Budget	\$ 399,677.00	\$ 416,104.00			
	Less Reg Transportation Aid	\$ (226,979.00)	\$ (196,846.00)			
	Trans Amount to be assessed	\$ 172,698.00	\$ 219,258.00			
Step 6				2023	2024	
3a	Otis	\$ 98,973.00	\$ 125,481.00	57.31%	57.23%	
3b	Sandisfield	\$ 73,725.00	\$ 93,777.00	42.69%	42.77%	
	Total	\$ 172,698.00	\$ 219,258.00			
Step 7	Total Op & Trans Assess.					
	Otis (1a+2a+3a)	\$ 2,172,379.00	\$ 2,295,885.00	5.69%	\$ 123,506.00	
	Sandisfield (1b+2b+3b)	\$ 1,458,963.00	\$ 1,543,929.00	5.82%	\$ 84,966.00	
Step 8	Capital Budget - Doors & Gym Ceiling	\$ 70,270.00	\$ 10,000.00		2024	
	Otis 50% Enrollment	\$ 20,135.00	\$ 2,862.00		57.23%	
	Otis 50% Equalized Valuation	\$ 25,761.00	\$ 3,713.00		74.25%	
	Otis Total	\$ 45,896.00	\$ 6,575.00			
	Sfld 50% Enrollment	\$ 15,000.00	\$ 2,139.00		42.77%	
	Sfld 50% 50% Equalized Valuation	\$ 9,374.00	\$ 1,287.00		25.75%	
	Sfld Total	\$ 24,374.00	\$ 3,426.00			
Total Annual Assessment						
	Otis (Step 7 + Step 8)	\$ 2,218,275.00	\$ 2,302,460.00	3.80%	\$ 84,185.00	
	Sandisfield (Step 7 + Step 8)	\$ 1,483,337.00	\$ 1,547,355.00	4.32%	\$ 64,018.00	
Enrollment		2021	2022	2023	Combined Total	FY24
Otis		125	136	127	388	57.23%
Sandisfield		96	100	94	290	42.77%
Total		221	236	221	678	
Equalized Valuation	FY2022 DLS Final Equalized Valuation	Total		% for Each Town		
Otis	\$ 755,586,300			74.25%		
Sandisfield	\$ 262,006,000	\$ 1,017,592,300		25.75%		

CURRENT ASSESSMENT METHODOLOGY				<i>Page 1 of 11</i>	
	District Totals	Breakdown by Towns		% Breakdown by Towns	
		Otis	Sandisfield	Otis	Sandisfield
District Foundation Enrollment (last 3 years average)	226	129	97	57.23%	42.77%
Equalized Valuations	\$1,017,592,300	\$755,586,300	\$262,006,000	74.25%	25.75%
50/50 Equal Weighting (Avg) of EV % & Enrollment %				65.74%	34.26%
Adjusted Operating Budget to be assessed	\$3,620,556				
Required Local Minimum Contribution	\$2,351,188	\$1,443,945	\$907,243	61.41%	38.59%
Remaining Adjusted Operating Budget to be assessed	\$1,269,368	\$726,423	\$542,945	57.23%	42.77%
Transportation Budget to be assessed	\$219,258	\$125,475	\$93,783	57.23%	42.77%
Capital Budget to be assessed	\$10,000	\$6,574	\$3,426	65.74%	34.26%
TOTAL ASSESSMENT	\$3,849,814	\$2,302,417	\$1,547,397	59.81%	40.19%
Tax Burden Factor: (% Total Assessment / % Total EV) - 1				-19.46%	56.11%

APPENDIX 3



\$153M delta

\$494M delta
(3.2x increase)

Reference: <https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=PropertyTaxInformation.EQV.EQV>

APPENDIX 4

**Massachusetts Department of Elementary and Secondary Education
FY24 Chapter 70 and Net School Spending Formula Spreadsheet**



08/10/23

1		3	4	5	6	7	8	9
		From DOR		From DOR				
		1. Calculation of effort goal (target local share)						
		uniform property percentage			uniform income percentage			
		0.3534%			1.5331%			
LEA	Town	total EQV 2022	local effort from property wealth	DOR total income 2020	local effort from income wealth	combined effort yield	FY24 foundation	
225	Otis	755,586,300	2,670,262	67,044,000	1,027,851	3,698,113	1,750,236	
260	Sandisfield	262,006,000	925,936	23,171,000	355,235	1,281,171	1,219,862	
Totals		\$1,017,592,300	\$3,596,198	\$90,215,000	\$1,383,086	\$4,979,284	\$2,970,098	
% Otis		74.25%	74.25%	74.32%	74.32%	74.27%	58.93%	
% Sandisfield		25.75%	25.75%	25.68%	25.68%	25.73%	41.07%	
Otis FY24 Assessment						\$2,302,417		
Sand FY24 Assessment						\$1,547,397		
Otis Ass't % CEY						62.26%		
Sand Ass't % CEY						120.78%		
Otis Ass't Under CEY						\$1,395,696		
Sand Ass't Over CEY						\$266,226		

MASSACHUSETTS DEPARTMENT OF REVENUE
 DIVISION OF LOCAL SERVICES
 BUREAU OF ACCOUNTS

Otis
 TOWN

TAX RATE RECAPITULATION
Fiscal Year 2024

I. TAX RATE SUMMARY

la. Total amount to be raised (from page 2, IIe)	\$ 8,612,568.09
lb. Total estimated receipts and other revenue sources (from page 2, IIIe)	2,995,126.69
lc. Tax Levy (Ia minus Ib)	\$ 5,617,441.40
ld. Distribution of Tax Rates and levies	

CLASS	(b) Levy percentage (from LA5)	(c) Ic above times each percent in col (b)	(d) Valuation by class (from LA-5)	(e) Tax Rates (c) / (d) x 1000	(f) Levy by class (d) x (e) / 1000
Residential	93.8452	5,271,699.12	813,534,010.00	6.48	5,271,700.38
Net of Exempt					
Open Space	0.0000	0.00	0.00	0.00	0.00
Commercial	1.8616	104,574.29	16,137,590.00	6.48	104,571.58
Net of Exempt					
Industrial	0.4971	27,924.30	4,309,700.00	6.48	27,926.86
SUBTOTAL	96.2039		833,981,300.00		5,404,198.82
Personal	3.7961	213,243.69	32,907,806.00	6.48	213,242.58
TOTAL	100.0000		866,889,106.00		5,617,441.40

MUST EQUAL 1C

MASSACHUSETTS DEPARTMENT OF REVENUE
 DIVISION OF LOCAL SERVICES
 BUREAU OF ACCOUNTS

Sandisfield
 TOWN

TAX RATE RECAPITULATION
Fiscal Year 2024

I. TAX RATE SUMMARY

la. Total amount to be raised (from page 2, IIe)	\$ 4,570,769.44
lb. Total estimated receipts and other revenue sources (from page 2, IIIe)	1,280,694.79
lc. Tax Levy (Ia minus Ib)	\$ 3,290,074.65
ld. Distribution of Tax Rates and levies	

CLASS	(b) Levy percentage (from LA5)	(c) Ic above times each percent in col (b)	(d) Valuation by class (from LA-5)	(e) Tax Rates (c) / (d) x 1000	(f) Levy by class (d) x (e) / 1000
Residential	87.0313	2,863,394.74	286,626,115.00	9.99	2,863,394.89
Net of Exempt					
Open Space	0.0000	0.00	0.00	0.00	0.00
Commercial	2.6052	85,713.02	8,579,958.00	9.99	85,713.78
Net of Exempt					
Industrial	0.0847	2,786.69	278,900.00	9.99	2,786.21
SUBTOTAL	89.7212		295,484,973.00		2,951,894.88
Personal	10.2788	338,180.19	33,851,829.00	9.99	338,179.77
TOTAL	100.0000		329,336,802.00		3,290,074.65

MUST EQUAL 1C

APPENDIX 6

Examples of other possible significant changes to the way the FRRSD is currently constructed and operated include:

To reduce FRRSD costs, one could consider changing the current model of one classroom per grade in the elementary school, resulting in multi-grade classrooms. This would of course lead to a smaller number of classes of larger size, which could potentially negatively impact the learning experience. It would also lead to staff reductions, for which the ramifications of the union contract would have to be given careful consideration.

To reduce costs further, one could also consider ceasing operation of the elementary school altogether and putting in place a tuition agreement(s) with an out-of-district elementary school(s), analogous to how it proceeds today with middle and high school pupils. This would likely result in significant cost savings, as the tuitions paid for the pupils would no doubt be considerably less than the current per pupil expenditures in the elementary school. However, in this case the elementary school pupils would no longer be “close and under local control”. And since this approach would result in very significant staff reductions, the ramifications of the union contract would again have to be given careful consideration here.

The following provide some limited but useful perspective regarding the second option above:

The second option above would render the FRRSD what is known as a non-operating school district, meaning that there are no in-district physical schools. This model is currently in use in MA, with just under 10 non-operating school districts currently in existence.

If Sandisfield was unable to continue with the FRRSD, it would likely form the Sandisfield School District as a non-operating municipal school district, and tuition all its pupils to out-of-district schools under tuition agreements, as this would no doubt reduce its education expenses appreciably from what they are today.

An example of deviation from a regional district is described below:

If Sandisfield was unable to continue with the FRRSD, one could consider reverting the district to a municipal district run by Otis, continuing operation of the elementary school, with all the district costs borne by Otis.

The following provides some limited but useful perspective regarding the above option:

In this option one would have to consider funding lost in the form of Sandisfield’s assessment (**\$1.5M**) and their apportionment of Chapter 70 state aid (**\$313K**), as well as state regional transportation aid (**\$197K**), since the state doesn’t provide transportation aid to municipal districts, only regional districts. It would also have to consider savings accrued by the district no longer having to pay tuitions for Sandisfield pupils (**\$486K**). And it would also have to account for funding potentially gained from choicing in 38 additional pupils to the elementary school (**\$190K**) – the same as the number of Sandisfield pupils currently enrolled in the elementary school – as a best-case scenario unlikely to be achieved near term, and perhaps never. It is estimated that this scenario would require Otis paying, in a best-case scenario, approximately **\$1.4M** a year more than it currently assessed by the FRRSD. *See Appendix 7.*

APPENDIX 7

CURRENT OTIS ASSESSMENT	\$2,302,417	
Funding Lost By Sandisfield Withdrawal	\$2,056,862	
Sandisfield Assessment		\$1,547,397
Sandisfield Share of Chap 70		\$312,619
Reg Transportation Aid		\$196,846
Savings Accrued By Sandisfield Withdrawal	-\$485,811	
Tuitions for Sandisfield Pupils (est)		-\$485,811
Funding Potentially Gained By Sandisfield Withdrawal	-\$190,000	
Additional FRE Choice In (best case)		-\$190,000
NEW OTIS ASSESSMENT	\$3,683,468	
\$ INCREASE	\$1,381,051	
% INCREASE	79.08%	
<i>FY24 Total Tuitions Paid</i>	<i>\$1,142,278</i>	
<i>FY23 % Sandisfield Enrollment</i>	<i>42.53%</i>	
<i>Estimate of Sandisfield Tuitions</i>	<i>\$485,811</i>	
<i># Sandisfield FRE Students</i>	<i>38</i>	
<i>Additional FRE Choice In (best case)</i>	<i>38</i>	
<i>Choice In Revenue per Pupil</i>	<i>\$5,000</i>	
<i>Choice In Revenue (best case)</i>	<i>\$190,000</i>	

APPENDIX 8

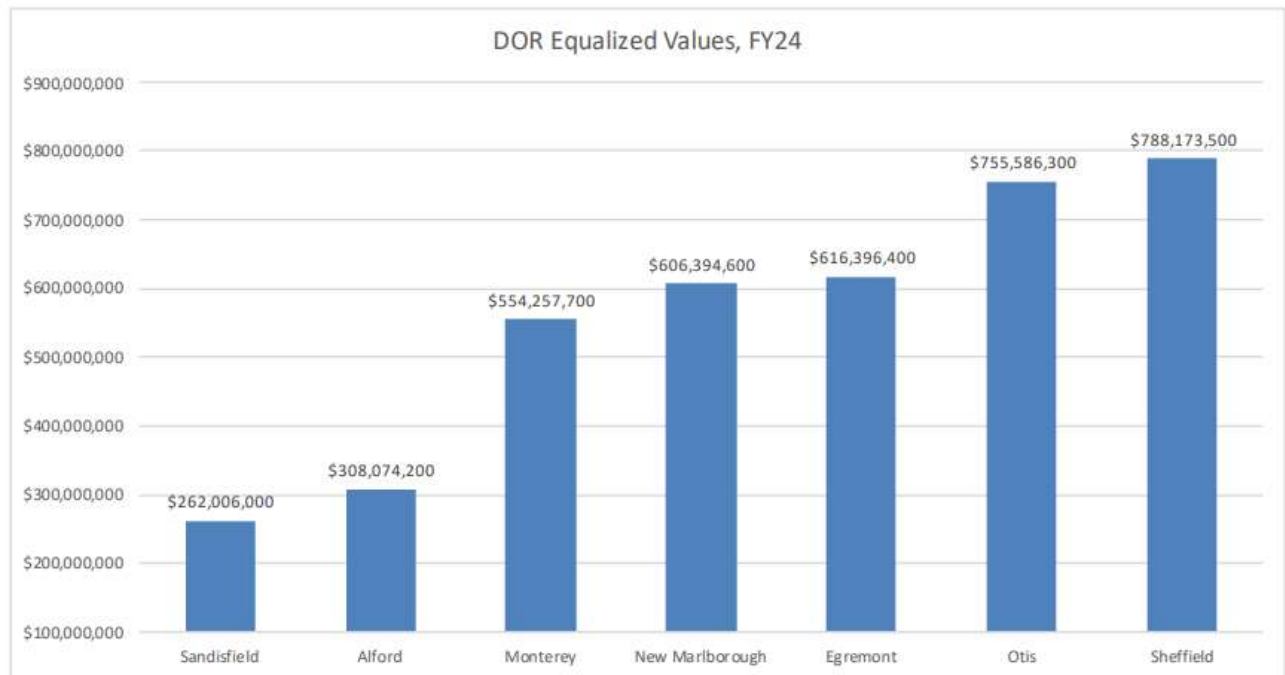
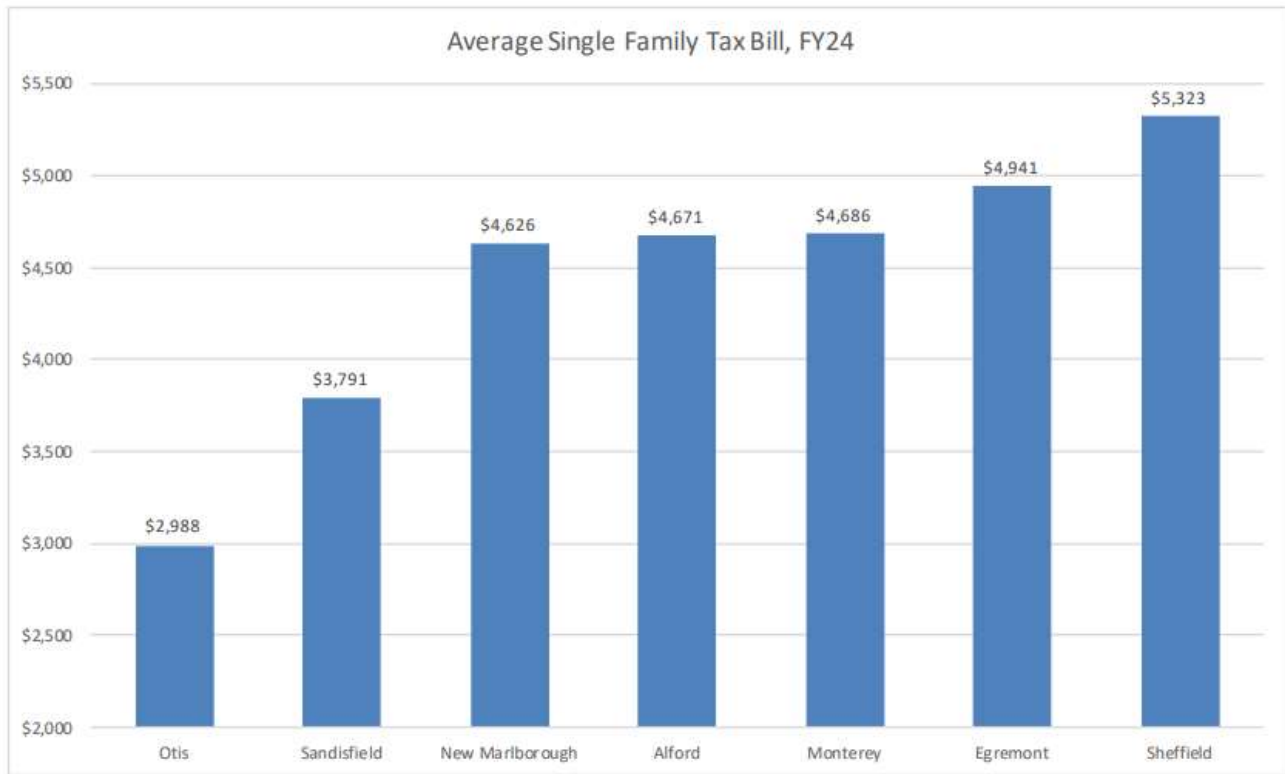
	FY24 Assessment	FY24 Enrollment	Assessment/Pupil
SBRSD			
Alford	\$476,808	19	\$25,095
Egremont	\$2,096,264	90	\$23,292
Monterey	\$1,830,529	75	\$24,407
New Marlborough	\$2,812,825	113	\$24,892
Sheffield	\$8,060,232	347	\$23,228
TOTAL	\$15,276,658	644	\$23,722
FRRSD			
Sandisfield	\$1,547,355	97	\$15,952
Otis	\$2,302,460	129	\$17,849
TOTAL	\$3,849,815	226	\$17,035

FY24 Assessment & Enrollment Data Published by FRRSD & SBRSD

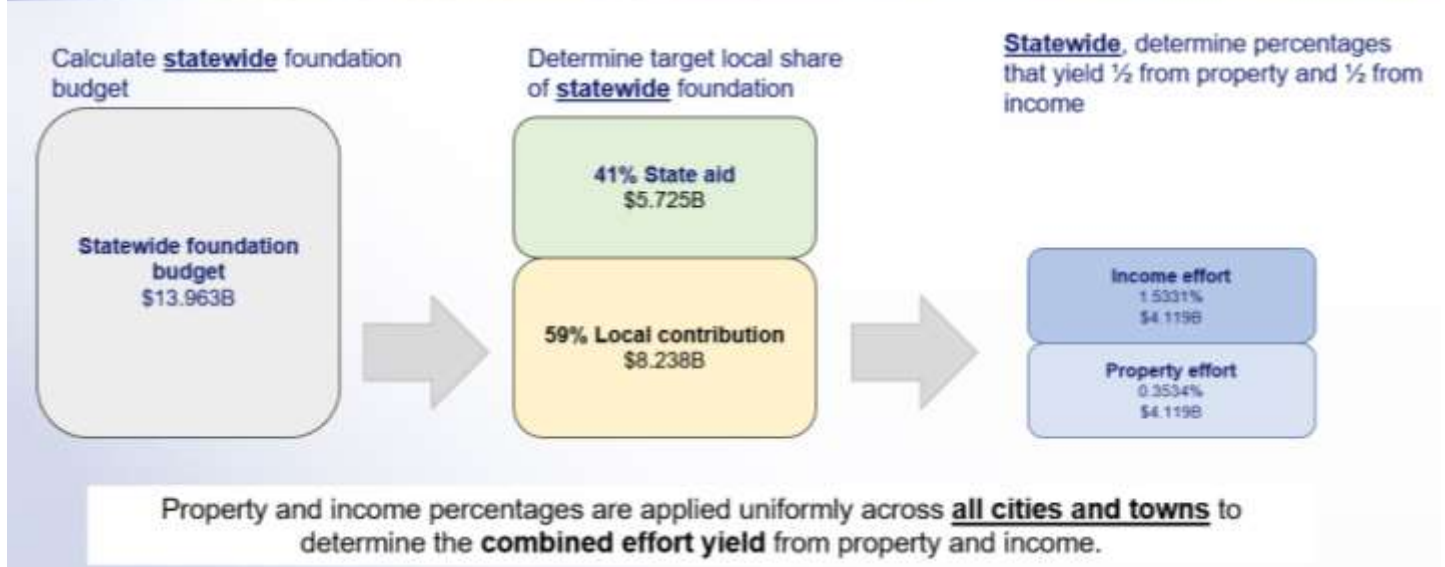
At 1/2 enrollment and 2/3 costs at elementary school,
FRRSD assessments per pupil are approximately:

Elementary School: \$22,713
Middle/High School: \$11,357

APPENDIX 9



Determining each municipality's target local share starts with the local share of statewide foundation



An individual municipality's target local share is based on its local property value, income, and foundation budget

- The sum of a municipality's local property and income effort equals its Combined Effort Yield (CEY)



- Target Local Share = CEY/Foundation budget (calculated at the city/town level)
 - Capped at 82.5% of foundation (166 municipalities or 47% are capped)

APPENDIX 11

CEY's	Otis	Sandisfield	Total	O% Total	S% Total	O-S	O/S	S/O
FY19	\$3,055,021	\$1,078,573	\$4,133,594	73.91%	26.09%	\$1,976,448	2.83	0.35
FY20	\$2,991,542	\$926,306	\$3,917,848	76.36%	23.64%	\$2,065,236	3.23	0.31
FY21	\$3,151,253	\$1,164,387	\$4,315,640	73.02%	26.98%	\$1,986,866	2.71	0.37
FY22	\$2,960,227	\$1,077,416	\$4,037,643	73.32%	26.68%	\$1,882,811	2.75	0.36
FY23	\$3,265,803	\$1,160,614	\$4,426,417	73.78%	26.22%	\$2,105,189	2.81	0.36
FY24	\$3,698,113	\$1,281,171	\$4,979,284	74.27%	25.73%	\$2,416,942	2.89	0.35
FY25	\$4,117,067	\$1,436,564	\$5,553,631	74.13%	25.87%	\$2,680,503	2.87	0.35

All CEY data above direct from DESE

	Otis			Sandisfield		
	CEY	Assessment	Assessment % of CEY	CEY	Assessment	Assessment % of CEY
FY19	\$3,055,021	\$2,421,150	79.25%	\$1,078,573	\$1,443,802	133.86%
FY20	\$2,991,542	\$2,389,710	79.88%	\$926,306	\$1,553,966	167.76%
FY21	\$3,151,253	\$2,352,330	74.65%	\$1,164,387	\$1,652,728	141.94%
FY22	\$2,960,227	\$1,988,757	67.18%	\$1,077,416	\$1,453,014	134.86%
FY23	\$3,265,803	\$2,141,357	65.57%	\$1,160,614	\$1,426,042	122.87%
FY24	\$3,698,113	\$2,302,460	62.26%	\$1,281,171	\$1,547,355	120.78%
FY25	\$4,117,067	\$2,385,519	57.94%	\$1,436,564	\$1,580,296	110.01%

All assessment data above confirmed by FRRSD Treasurer

APPENDIX 12

MASSACHUSETTS DEPARTMENT OF REVENUE
 DIVISION OF LOCAL SERVICES
 BUREAU OF ACCOUNTS

Otis
 TOWN

**Levy Limit
 Fiscal Year 2024**

FOR BUDGET PLANNING PURPOSES

I. TO CALCULATE THE FY 2023 LEVY LIMIT

A. FY 2022 Levy Limit	5,706,169	
A1. Amended FY 2022 Growth	0	
B. ADD (IA + IA1)*2.5%	142,654	
C. ADD FY 2023 New Growth	50,989	
C1. ADD FY 2023 New Growth Adjustment	0	
D. ADD FY 2023 Override	0	
E. FY 2023 Subtotal	5,899,812	
F. FY 2023 Levy Ceiling	20,110,080	I. 5,899,812
		FY 2023 Levy Limit

II. TO CALCULATE THE FY 2024 LEVY LIMIT

A. FY 2023 Levy Limit from I	5,899,812	
A1. Amended FY 2023 Growth	0	
B. ADD (IIA + IIA1)*2.5%	147,495	
C. ADD FY 2024 New Growth	23,757	
C1. ADD FY 2024 New Growth Adjustment	0	
D. ADD FY 2024 Override	0	
E. ADD FY 2024 Subtotal	6,071,064	
F. FY 2024 Levy Ceiling	21,672,228	II. 6,071,064
		FY 2024 Levy Limit

III. TO CALCULATE THE FY 2024 MAXIMUM ALLOWABLE LEVY

A. FY 2024 Levy Limit from II.	6,071,064
B. FY 2024 Debt Exclusion(s)	-6,554
C. FY 2024 Capital Expenditure Exclusion(s)	0
D. FY 2024 Stabilization Fund Override	0
E. FY 2024 Other Adjustment :	0
F. FY 2024 Water/Sewer	0
G. FY 2024 Maximum Allowable Levy	6,064,510

MASSACHUSETTS DEPARTMENT OF REVENUE
 DIVISION OF LOCAL SERVICES
 BUREAU OF ACCOUNTS

Sandisfield
 TOWN

**Levy Limit
 Fiscal Year 2024**

FOR BUDGET PLANNING PURPOSES

I. TO CALCULATE THE FY 2023 LEVY LIMIT

A. FY 2022 Levy Limit	3,437,839	
A1. Amended FY 2022 Growth	0	
B. ADD (IA + IA1)*2.5%	85,946	
C. ADD FY 2023 New Growth	39,215	
C1. ADD FY 2023 New Growth Adjustment	0	
D. ADD FY 2023 Override	0	
E. FY 2023 Subtotal	3,563,000	
F. FY 2023 Levy Ceiling	7,463,917	I. 3,563,000
		FY 2023 Levy Limit

II. TO CALCULATE THE FY 2024 LEVY LIMIT

A. FY 2023 Levy Limit from I	3,563,000	
A1. Amended FY 2023 Growth	0	
B. ADD (IIA + IIA1)*2.5%	89,075	
C. ADD FY 2024 New Growth	38,274	
C1. ADD FY 2024 New Growth Adjustment	0	
D. ADD FY 2024 Override	0	
E. ADD FY 2024 Subtotal	3,690,349	
F. FY 2024 Levy Ceiling	8,233,420	II. 3,690,349
		FY 2024 Levy Limit

III. TO CALCULATE THE FY 2024 MAXIMUM ALLOWABLE LEVY

A. FY 2024 Levy Limit from II.	3,690,349
B. FY 2024 Debt Exclusion(s)	0
C. FY 2024 Capital Expenditure Exclusion(s)	0
D. FY 2024 Stabilization Fund Override	0
E. FY 2024 Other Adjustment :	0
F. FY 2024 Water/Sewer	0
G. FY 2024 Maximum Allowable Levy	3,690,349

APPENDIX 14

DOR Code	Municipality	Fiscal Year	Levy Limit w/o Debt & Capital Exclusions	Maximum Levy Limit	Total Tax Levy	Excess Levy Capacity	Excess as a % of Maximum Levy	Levy Ceiling	Override Capacity	Override Capacity as a % of Levy Ceiling	Total Assessed Value	Tax Levy as % of Assessed Value
225	Otis	2007	3,129,615	3,252,560	3,236,970	15,590	0.48	13,398,054	10,268,439	76.64	535,922,165	0.60
225	Otis	2008	3,271,949	3,384,899	3,378,816	6,083	0.18	13,624,260	10,352,311	75.98	544,970,383	0.62
225	Otis	2009	3,683,200	3,832,945	3,832,652	293	0.01	14,994,725	11,311,525	75.44	599,788,996	0.64
225	Otis	2010	3,827,314	3,922,598	3,836,288	86,310	2.20	15,151,218	11,323,904	74.74	606,048,721	0.63
225	Otis	2011	3,970,526	4,096,666	4,089,937	6,729	0.16	15,445,381	11,474,855	74.29	617,815,241	0.66
225	Otis	2012	4,103,297	4,219,172	4,213,973	5,199	0.12	15,538,247	11,434,950	73.59	621,529,881	0.68
225	Otis	2013	4,254,410	4,361,211	4,332,157	29,054	0.67	15,105,150	10,850,740	71.83	604,205,990	0.72
225	Otis	2014	4,396,725	4,492,537	4,423,885	68,653	1.53	15,150,289	10,753,564	70.98	606,011,575	0.73
225	Otis	2015	4,551,828	4,635,865	4,607,261	28,604	0.62	15,296,351	10,744,523	70.24	611,854,055	0.75
225	Otis	2016	4,698,471	4,778,545	4,775,344	3,201	0.07	15,208,101	10,509,630	69.11	608,324,038	0.79
225	Otis	2017	4,858,832	4,930,165	4,919,538	10,627	0.22	15,221,342	10,362,510	68.08	608,853,666	0.81
225	Otis	2019	5,180,195	5,171,774	5,084,141	87,633	1.69	15,350,668	10,170,473	66.25	614,026,726	0.83
225	Otis	2020	5,344,437	5,346,513	5,141,572	204,941	3.83	15,412,387	10,067,950	65.32	616,495,484	0.83
225	Otis	2021	5,506,920	5,499,169	5,296,863	202,306	3.68	15,634,188	10,127,268	64.78	625,367,515	0.85
225	Otis	2022	5,706,169	5,699,013	5,417,397	281,616	4.94	17,475,475	11,769,306	67.35	699,019,001	0.78
225	Otis	2023	5,899,812	5,892,940	5,325,149	567,791	9.64	20,110,080	14,210,268	70.66	804,403,198	0.66
225	Otis	2024	6,071,064	6,064,510	5,617,441	447,069	7.37	21,672,228	15,601,164	71.99	866,889,106	0.65
260	Sandisfield	2007	1,888,526	1,946,276	1,787,960	158,316	8.13	5,643,814	3,755,288	66.54	225,752,558	0.79
260	Sandisfield	2008	1,970,859	2,025,119	1,894,506	130,613	6.45	5,740,926	3,770,067	65.67	229,637,041	0.83
260	Sandisfield	2009	2,074,610	2,145,663	2,144,032	1,631	0.08	5,982,232	3,907,622	65.32	239,289,284	0.90
260	Sandisfield	2010	2,164,272	2,209,360	2,088,724	120,636	5.46	6,050,766	3,886,494	64.23	242,030,621	0.86
260	Sandisfield	2011	2,236,760	2,299,114	2,289,587	9,527	0.41	6,082,857	3,846,097	63.23	243,314,266	0.94
260	Sandisfield	2012	2,339,342	2,397,427	2,377,343	20,084	0.84	5,884,514	3,545,172	60.25	235,380,544	1.01
260	Sandisfield	2013	2,586,864	2,640,835	2,610,742	30,093	1.14	5,180,043	2,593,179	50.06	207,201,738	1.26
260	Sandisfield	2014	2,678,232	2,725,189	2,721,597	3,592	0.13	5,357,475	2,679,243	50.01	214,298,995	1.27
260	Sandisfield	2015	2,767,331	2,810,264	2,809,732	532	0.02	5,403,331	2,636,000	48.78	216,133,236	1.30
260	Sandisfield	2016	2,852,760	2,889,480	2,808,002	81,478	2.82	5,408,324	2,555,564	47.25	216,332,965	1.30
260	Sandisfield	2017	2,935,167	2,967,803	2,872,035	95,768	3.23	5,402,625	2,467,458	45.67	216,104,988	1.33
260	Sandisfield	2019	3,125,227	3,125,227	2,963,834	161,393	5.16	6,159,255	3,034,028	49.26	246,370,215	1.20
260	Sandisfield	2020	3,227,269	3,227,269	3,193,861	33,408	1.04	6,003,497	2,776,228	46.24	240,139,890	1.33
260	Sandisfield	2021	3,328,346	3,328,346	3,215,216	113,130	3.40	6,021,005	2,692,659	44.72	240,840,182	1.34
260	Sandisfield	2022	3,437,839	3,437,839	3,295,513	142,326	4.14	6,386,652	2,948,813	46.17	255,466,098	1.29
260	Sandisfield	2023	3,563,000	3,563,000	3,161,715	401,285	11.26	7,463,917	3,900,917	52.26	298,556,698	1.06
260	Sandisfield	2024	3,690,349	3,690,349	3,290,075	400,274	10.85	8,233,420	4,543,071	55.18	329,336,802	1.00

DOR Code	Municipality	Fiscal Year	Levy Limit w/o Debt & Capital Exclusions	Maximum Levy Limit	Total Tax Levy	Excess Levy Capacity	Excess as a % of Maximum Levy	Levy Ceiling	Override Capacity	Override Capacity as a % of Levy Ceiling	Total Assessed Value	Tax Levy as % of Assessed Value
112	Granville	2024	4,012,271	4,232,692	3,695,222	537,470	12.70	6,987,938	2,975,667	42.58	279,517,530	1.32
193	Monterey	2024	4,775,690	4,950,754	4,313,494	637,260	12.87	17,591,736	12,816,046	72.85	703,669,432	0.61
203	New Marlborough	2024	6,047,836	6,309,724	5,741,372	568,352	9.01	19,240,522	13,192,686	68.57	769,620,870	0.75
225	Otis	2024	6,071,064	6,064,510	5,617,441	447,069	7.37	21,672,228	15,601,164	71.99	866,889,106	0.65
260	Sandisfield	2024	3,690,349	3,690,349	3,290,075	400,274	10.85	8,233,420	4,543,071	55.18	329,336,802	1.00
297	Tolland	2024	1,745,761	2,053,920	2,006,077	47,843	2.33	6,268,992	4,523,231	72.15	250,759,675	0.80
302	Tyringham	2024	1,776,451	1,776,451	1,487,943	288,508	16.24	5,942,263	4,165,812	70.10	237,690,520	0.63

All data from MA DOR databank

APPENDIX 15

DOR Code	Municipality	Fiscal Year	Vote Date	Win / Loss	Yes Votes	No Votes	Vote Type	Amount	Description	Department
225	Otis	1990	5/1/1989	WIN	132	76	Override	76,061	Operating	GENERAL OPERATING
225	Otis	1991	5/1/1990	WIN	137	130	Override	154,785	General Operating Budget	GENERAL OPERATING
225	Otis	1996	5/23/1995	WIN	116	98	Override	31,222	Rescue Truck	PUBLIC SAFETY
225	Otis	1996	5/23/1995	WIN	120	96	Override	64,000	Backhoe For Highway Department	PUBLIC WORKS & FACILITIES
225	Otis	2009	7/15/2008	WIN	145	97	Override	185,788	Operating Budget For Farmington River School	SCHOOL
225	Otis	2009	7/15/2008	WIN	124	118	Override	24,458	Defraying The Towns Expenses	GENERAL OPERATING
225	Otis	2009	7/15/2008	WIN	153	88	Override	45,600	Operating Budget Of The Otis Rescue Squad	PUBLIC SAFETY
260	Sandisfield	1991	11/16/1990	WIN	112	107	Override	44,132	Prop 2 1/2 Sum For Schools	SCHOOL
260	Sandisfield	1991	11/16/1990	WIN	113	103	Override	2,405	Fire Chief Salary And Ambulance Mainten.	PUBLIC SAFETY
260	Sandisfield	1991	11/16/1990	WIN	128	91	Override	23,899	Monies For Highways & Brid. Snow Removal	PUBLIC WORKS & FACILITIES
260	Sandisfield	1991	11/16/1990	WIN	129	91	Override	22,331	Prop 2 1/2 Sum For Waste Disposal	PUBLIC WORKS & FACILITIES
260	Sandisfield	1991	11/16/1990	WIN	117	102	Override	4,580	Mainten.Of Cemetary,Town Hall, Library	GENERAL OPERATING
260	Sandisfield	2013	5/14/2012	WIN	110	75	Override	150,000	Fund Fiscal Year 2013 Operating Budget	GENERAL OPERATING

Municipality	Fiscal Year	Amount	Description	Department
Egremont	1990	86,000	General Budget	GENERAL OPERATING
Egremont	1991	84,000	General Operating Budget	GENERAL OPERATING
Monterey	1991	65,000	General Operating Expenditures	GENERAL OPERATING
Monterey	2007	300,000	Operating Budgets Of The Town	GENERAL OPERATING
Monterey	2017	500,000	To Fund The General Operating Expenses	GENERAL OPERATING
New Marlboro	1991	60,000	General Operating Budget	GENERAL OPERATING
New Marlboro	2009	225,000	Operating Budget Of The Southern Berkshire Regional S	SCHOOL
New Marlboro	2011	160,000	Funding Operating Budget Of Regional School	SCHOOL
New Marlboro	2013	87,828	Purpose Of Funding For The Fiscal Year Beginning July	SCHOOL
Sheffield	1990	105,725	So Berkshire Reg. Sch. District Oper Exp	SCHOOL
Sheffield	1991	220,000	Fund Landfill Capping Project	PUBLIC WORKS & FACILITIES
Sheffield	1991	7,500	Purchase Fire Dept. Equip.	PUBLIC SAFETY
Sheffield	1991	446,425	Fund Berk. Reg. Sch. Dist.Expen.	SCHOOL
Sheffield	2009	100,000	Funding Southern Berkshire Regional School District Ope	SCHOOL
Sheffield	2010	177,000	Funding The Southern Berkshire Regional School District	SCHOOL

All data from MA DOR databank

APPENDIX 16

Municipality	Fiscal Year	Education Cost	Max Allow Tax Levy	% of Max Allow Levy
Adams	2023		\$ 13,663,785	0.00%
Dalton	2023		\$ 15,599,272	0.00%
Peru	2023		\$ 2,438,430	0.00%
Alford	2023	\$ 450,604	\$ 1,985,829	22.69%
Mount Washington	2023	\$ 172,783	\$ 702,684	24.59%
Stockbridge	2023	\$ 3,591,533	\$ 11,177,341	32.13%
Otis	2023	\$ 2,218,275	\$ 5,892,940	37.64%
Monterey	2023	\$ 1,855,101	\$ 4,895,623	37.89%
Egremont	2023	\$ 1,960,004	\$ 5,088,105	38.52%
Sandisfield	2023	\$ 1,483,337	\$ 3,563,000	41.63%
Becket	2023	\$ 3,122,155	\$ 7,163,548	43.58%
New Marlborough	2023	\$ 2,716,850	\$ 5,948,805	45.67%
West Stockbridge	2023	\$ 3,268,485	\$ 6,844,252	47.76%
Lee	2023	\$ 10,164,902	\$ 19,102,624	53.21%
Hinsdale	2023	\$ 3,063,494	\$ 5,621,540	54.50%
Lenox	2023	\$ 12,266,207	\$ 21,117,030	58.09%
Sheffield	2023	\$ 7,834,302	\$ 12,306,479	63.66%
Richmond	2023	\$ 3,967,596	\$ 6,226,804	63.72%
Great Barrington	2023	\$ 18,972,362	\$ 28,149,434	67.40%
Cheshire	2023	\$ 3,409,934	\$ 4,755,730	71.70%

Ave 47.32, Median 47.19%

DOR Code	Municipality	Fiscal Year	Date Certified	Fixed Free Cash as a % of the Budget	Operating Budget Prior Year	Fixed Free Cash as a % of the Budget
225	Otis	2020	02/25/2020	667,582	6,708,778	9.95%
225	Otis	2021	03/31/2021	1,154,872	7,220,900	15.99%
225	Otis	2022	04/06/2022	1,634,991	7,187,300	22.75%
225	Otis	2023	01/31/2023	2,351,257	7,382,943	31.85%
225	Otis	2024			7,715,648	
260	Sandisfield	2020	11/21/2019	657,090	3,381,148	19.43%
260	Sandisfield	2021	11/04/2020	1,029,719	4,437,834	23.20%
260	Sandisfield	2022	01/26/2022	1,231,127	3,730,355	33.00%
260	Sandisfield	2023	02/17/2023	329,677	4,144,685	7.95%
260	Sandisfield	2024			5,235,942	

All data from MA DOR databank