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Candidate, State Representative — 2nd Worcester District

Gardner · Ashburnham · Templeton · Winchendon

Chapter 70: A Structural Analysis of the Education Funding Formula

As a candidate for State Representative, I believe we should be looking for answers that show up in budgets, not just in press releases. Structural problems require structural solutions. And the person you send to Boston should be able to show that work on day one.

GARDNER, MA — I went through the Chapter 70 formula line by line to understand what it actually does to our four towns. What I found is that the problems we face are not the result of bad local decisions. They are built into the formula itself.

211 of 360 Massachusetts school districts receive hold-harmless funding—aid that stays flat while costs go up. Some have lost roughly 38 percent of their purchasing power since 2010. The formula assumes costs shrink when enrollment drops. They don't. A school building costs what it costs. And the formula calculates local contributions that can exceed what Proposition 2½ legally allows a town to raise.

The rural schools bill has been filed and killed three sessions running. The House champion resigned in January. Vermont and Maine have both enacted structural reforms. Massachusetts has not.

So I built a working model, checked nearly 4,000 amendments across three budget cycles, and wrote five specific fixes that nobody has filed. Three cost nothing. Two cost \$18–35 million combined—fundable from existing Fair Share education revenue already in the FY2027 budget. No new taxes. No redistribution from any district.

Projected impact for our towns: Gardner +3.15% · Ashburnham-Westminster +3.76% · Narragansett (Templeton) +3.32% · Winchendon +4.36% · Combined \$2.57M in additional aid.

Everything is sourced. The workbook is open. The amendment language is public. This is the kind of work I think a representative should do before asking for your vote.

The full analysis follows. All materials: drive.google.com

THE FORMULA

Massachusetts funds K–12 education through Chapter 70 of the General Laws. In FY2027—the final year of the Student Opportunity Act phase-in—the statewide appropriation is approximately \$7.66 billion, with minimum aid at \$160 per pupil and \$20 million in rural school aid. ([DESE](#))

$$\begin{aligned} \text{FB}(d) &= \sum [E(d,c) \times R(c)] \times \text{WAF}(d) \times \text{INF} \\ \text{CEY}(m) &= [\alpha \times \text{PV}(m)] + [\beta \times \text{PI}(m)] \\ \text{Aid}(d) &= \max[\text{FB}(d) - \text{RLC}(m), \text{BaseAid} + \text{MinAid}] \end{aligned}$$

The formula is elegant in concept. But its structural assumptions produce predictable, compounding inequities for small-city and rural districts.

FIVE STRUCTURAL FAILURES

1. Fixed costs vs. enrollment

The foundation budget scales linearly with enrollment, but actual operating costs do not. A district that loses fifteen students does not lose a building. The Special Commission documented a 16.7% cost premium for districts below 1,300 students.

Source: *Special Commission on Rural School Districts, July 2022.* [\[source\]](#)

2. Hold-harmless erosion

Hold-harmless provisions freeze aid at a prior year’s level. A district held harmless since FY2010 has lost approximately 38 percent of its purchasing power. 211 of 360 districts are in this position.

Sources: [BLS CPI-U](#); *MARS Project 211, Oct. 2024.*

3. Wealth measurement distortion

The formula treats rising property values as increased ability to pay. In communities where valuations have outpaced household income, this overstates what residents can actually afford.

Source: *Sen. Comerford testimony, Local Contribution Study, Nov. 2025.*

4. Scale penalty

A district of 800 students requires the same overhead as one of 5,000. The formula treats these costs as variable. They are not.

Source: *Special Commission on Rural School Districts, July 2022.* [\[source\]](#)

5. Proposition 2½ conflict

The formula can require local contributions that exceed what Prop 2½ allows a town to raise. No statutory mechanism reconciles the two.

Source: *MMA, “A Perfect Storm,” Oct. 2025.* [\[source\]](#)

THE 2ND WORCESTER DISTRICT

All four towns share the same profile: hold-harmless, declining enrollment, rising valuations that overstate ability to pay, and costs that don't scale.

	Gardner	Ashburnham	Templeton	Winchendon
FY25 Ch.70 Aid	\$29.7M	\$15.9M	\$12.5M	\$14.1M
Hold-Harmless	Yes	Yes	Yes	Yes
Enrollment	Declining	Declining	Declining	Declining
Median HH Income	\$58K	\$95K	\$67K	\$56K

Sources: Rep. Zlotnik FY25 briefing. Income: [ACS 5-year](#).

WHY IT HASN'T BEEN FIXED

Rep. Blais and Sen. Comerford filed the rural schools bill three consecutive sessions. Each time it was stripped during the House budget process. No version received a floor vote. Rep. Blais resigned January 2026.

Vermont's [Act 73](#) created \$3,500 per-student grants. Maine enacted its first reform in 20 years in April 2026. Massachusetts formed a study commission.

FIVE PROPOSED AMENDMENTS

Verified unfiled across 3,902 amendments via the [MA Legislature API](#).

1. Hold-Harmless Transparency

<\$50K · Amends c.70, s.6 · Draft ready

Requires DESE to publish inflation-adjusted erosion data it already calculates. Includes savings clause.

2. Enrollment Smoothing

\$8–15M · Amends c.70, s.3

Three-year rolling average for districts below 1,500. Self-extinguishing.

3. RLC Growth Cap

\$10–20M · Amends c.70, s.3

Caps local contribution increases at Prop 2½ levy capacity.

4. Inflation-Indexed Minimum Aid

\$0 new · Budget language FY27; permanent FY28+

Restructures existing \$52.2M Fair Share supplement.

5. Mandatory Formula Review

<\$500K · Amends c.70, s.4

Five-year FBRC cycle. 180-day legislative response requirement.

FISCAL IMPACT

No new revenue sources. \$18–35M from Rural School Aid and 0.4–0.7% of \$2.7B [Fair Share](#). Total: 0.24–0.46% of \$7.66B.

Gardner +3.15%, Ashburnham-Westminster +3.76%, Narragansett +3.32%, Winchendon +4.36%. Combined \$2.57M. No district loses aid.

COUNTERARGUMENTS

Why fund shrinking districts? The cost curve is step-function, not linear.

Divert from urban? Only through redistribution. These use existing Fair Share and rural aid.

More spending? Three of five cost nothing. The other two use existing revenue. No new taxes.

CONCLUSION

This is a math problem. It has math solutions. Towns cannot cut their way out of a formula problem.

ATTACHMENTS

1. [S.4 Amendment Package](#) — Five amendments with draft statutory language.
2. [Fiscal Pay-Fors](#) — Funding sources within existing FY2027 budget.
3. [Draft Legislative Language](#) — Ready-to-file text amending MGL c.70, s.6(g).
4. [Municipal Impact Analysis](#) — District-level projections.
5. [Governance Workbook](#) — 86 formulas, reform simulations, stress-tested.
[Full packet folder](#)

SOURCES

DESE Chapter 70 data, FY2026–2027. [\[source\]](#)
SWM FY2027 (S.4). \$7.66B, \$160 min aid, \$20M rural aid.
House FY2027 (H.5500). \$10M rural school aid.
MARS Project 211, Oct. 2024. 211/360 HH districts.
Special Commission on Rural School Districts, July 2022. [\[source\]](#)
MMA, “A Perfect Storm,” Oct. 2025. [\[source\]](#)
Sen. Comerford, LC Study testimony, Nov. 2025.
Vermont Act 73 of 2025. [\[source\]](#)
Portland Press Herald, ME reform, April 2026. [\[source\]](#)
BLS CPI-U CUUR0000SA0. [\[source\]](#)
ACS 5-Year, U.S. Census. [\[source\]](#)
MassBudget SWM FY2027. [\[source\]](#)
MA Legislature API. 3,902 amendments. [\[source\]](#)
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