APPENDIX

Commonwealth

Power and Politics, Money and Municipalities

351 municipal profiles — Appendix

Each profile is one city or town's page from the web edition, parcenomics.com/commonwealth, printed. It opens with the municipality's legislators, school districts and planning agency and then follows the same order for all 351: the Fairness Index, where 50 is a fair share; state money by class, FY2017–FY2026; local earmarks on three measures; what the town carries, including state land and new growth; costs and the 2½% limit; schools; expected and actual; peers; and sources. Each section's heading states its main finding. Dollars carry their stage, enacted for budget clauses and paid for Comptroller payments. "Not reported" and "not available" mean the source has no figure; nothing missing is shown as zero. Notes common to every profile are on the next page; the full method is at parcenomics.com/commonwealth/method.

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Notes common to every profile

FAIRNESS INDEX

Each town gets two scores from 0 to 100, where 50 is a fair share: one on all state aid, one on discretionary money (competitive grants and earmarks that name the town). Each score averages four ways of defining a fair share: Equal, the same per resident; Need, weighted toward poverty, low income and a thin tax base; Burden, by what each program pays for (road miles, bridges, pupils and so on); Effort, by what residents already pay in property tax relative to their income. The bars mark 50. The range repeats the score under 231 weightings, each lens between 10% and 40%.

STATE MONEY, FY2017–FY2026

Formula aid is gross: Chapter 70 as DESE attributes it to the town, and cherry-sheet aid before the state deducts charges such as charter tuition and transit assessments, plus other formula programs as paid. Competitive grants and earmark-account payments are Comptroller payments to the town government and its school districts (stage: paid). Enacted earmarks and earmark-account payments are different things: enacted earmarks are budget clauses; earmark-account payments come from accounts classified as earmarks, which can carry prior-year and statewide-program money. Either can be larger. Rank 1 is the highest amount per resident among 351.

EARMARKS

Local earmarks are enacted “not less than” clauses, counted three ways and labeled every time: names the town (clauses that direct money to the city or town); placed in the town (adds organizations located there); everything placed (adds state facilities located there and MassHealth rate add-ons for providers there).

WHAT THE TOWN CARRIES

The burden index divides the competitive awards a town received, FY2017–FY2026, by what it would have received if every program had split its money by its own measure of need: road miles for road programs, crossings for culvert grants, town-owned hazard dams for dam repair, jobs for economic development, residents for libraries. 1.0 is proportional. Bridges count by replacement cost and condition, and only bridges the town owns. State land eligible for PILOT is the Division of Local Services’ count of state-owned acres on which the state pays a payment in lieu of taxes; the payment follows assessed value, so PILOT per acre is a comparison, not the formula. The state-owned share on the land-area tile is the MassGIS map of all state-owned open space, a wider count. New growth is the assessed value of new construction and improvements added to the tax base, FY2017–FY2025, per resident.

COSTS AND THE 2½% LIMIT

State aid is the gross cherry sheet as entered on the tax rate recap; spending is general-fund expenditures as filed with the Division of Local Services. Net subtracts the charges the state assesses on the same cherry sheet (charter and school-choice tuition, transit, county and other assessments), itemized from FY2010. Consumer prices are the Boston-area CPI-U, up 55.1% from FY2006 to FY2025; government prices are the federal price index for state and local government purchases, up 74.5%; fiscal-year averages. Fixed costs are employee benefits, retirement, insurance and similar general-fund costs; health insurance comes from a separate DLS report. Allowed levy growth is 2.5% plus new growth, as a share of the prior year’s levy limit; a year counts as squeezed when fixed costs grew by a larger percentage. An earmark is a one-year appropriation; a health-insurance increase recurs. Earmarks are not adjusted for the January 2024 mid-year cuts or the FY2026 hold. Flags mark one-year swings beyond 30%, which usually reflect costs moving between budget lines, trust funds or the Group Insurance Commission. Section 8 of the Commonwealth report, “The squeeze,” has the statewide figures.

SCHOOLS

Real figures use the CPI-U, fiscal-year average, in FY2026 dollars. The required contribution is the local share the state sets under the Chapter 70 formula; its share of income divides it per household by the town’s median household income.

EXPECTED AND ACTUAL

The expectation comes from a statewide model of all 351 municipalities using population, road miles, jobs, poverty, income, tax base, school-aid share and the presence of hospitals, colleges and nonprofits. Those factors explain about 55–60% of the differences between towns. A gap is a starting point for questions, not a finding about anyone’s conduct. Earmarks here are placed in the town, the second measure.

PEERS

Peers are the ten municipalities nearest on population, income need and tax-base need; the print shows the five nearest plus the highest and lowest on earmarks placed in the town per resident in the wider class of 30. Formula aid per resident is the ten-year gross total; competitive grants are ten-year totals paid.

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PLYMOUTH COUNTY

Abington

Town · Plymouth County · 17,053 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Plymouth · Alyson M. Sullivan-Almeida

STATE SENATE

Norfolk and Plymouth · John F. Keenan

SCHOOL DISTRICTS

Abington Public Schools, the town's own district

South Shore Regional Vocational Technical School District, vocational, shared with Cohasset, Hanover, Hanson, Marshfield, Norwell, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Abington scores 42 on the Fairness Index for all state aid and 35 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

195th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	46	41	38

Rank under other weightings: 187th to 201st.

Stable low: below 45 under every weighting

Abington received less than its share of state aid on all four measures; its blended score of 42 stays between 41 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

35 / 100

244th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	37	42	30

Rank under other weightings: 233rd to 252nd.

Stable low: below 45 under every weighting

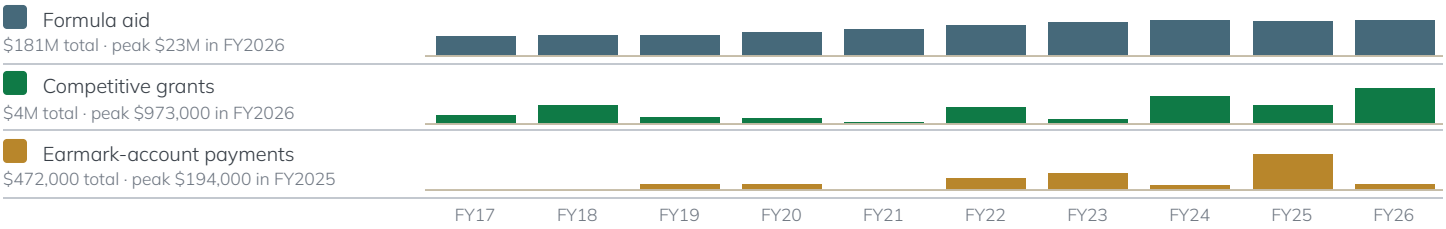
Abington received less than its share of discretionary money on all four measures; its blended score of 35 stays between 33 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Abington's town government and school districts received $181 million in formula aid and $4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$181M	**$4M**	**$472,000**
$10,596 per resident (162nd of 351) · gross	$233 per resident (234th of 351)	$27.65 per resident (158th of 351)

Competitive grants to Abington peaked in FY2026 at $973,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.9 million, are not shown.

EARMARKS

Abington received $662,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$662,000	**$662,000**	**$662,000**	**Not a member**
$38.85 per resident (194th of 351)	$38.85 per resident (207th of 351)	$38.85 per resident (210th of 351)	35 municipalities had none

Placed in the town: 20 clauses in nine of ten budgets; the most recent in FY2026. Every one names Abington directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"the town of Abington for traffic and sidewalk improvements"	Enacted names the town
FY2020	$85,000	"roof repairs and replacement at the council on aging in the town of Abington"	Enacted names the town
FY2023	$75,000	"the town of Abington for traffic and sidewalk improvements"	Enacted names the town
FY2017	$50,000	"the town of Abington for a public safety grant along route 18"	Enacted names the town
FY2025	$30,000	"the police department of the town of Abington for the purchase of a utility vehicle"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Abington received about its proportional share of competitive grant awards.

Local road miles **60.5** 214th of 351 · 3.5 per 1,000 residents (297th of 351)	Town-owned bridges, replacement cost **$5.2M** scored exposure $1.8M · one in poor condition	Road-stream crossings **53** 249th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **10.0 sq mi** 9% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,053** residents plus seasonal	Core infrastructure index **2.04** roads, culverts, dams, coast, flood, energy

Burden index 1.02; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **613 acres** 9.6% of land area · FY2026	State-owned land PILOT, FY2026 **$248,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$406** statewide $117 · FY2026	New growth per resident **$11,013** FY2017–2025 · 304th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 25.5% of Abington's general-fund spending in FY2025, down from 27.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.3%** $9.2M of $33.7M · median town 14.1%	FY2016 **22.0%** $9.7M of $44.2M · median town 12.2%	FY2025 **25.5%** $17.6M of $69.1M · median town 11.5%	Net of state charges, FY2025 **23.5%** FY2010: 24.4% · median town 10.0%

Abington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Abington's state aid kept pace with both price measures: FY2025 aid was 23.3% above its FY2006 aid grown by Boston-area consumer prices and 9.6% above grown by the government price index.

Gross state aid went from $9.2 million in FY2006 to $17.6 million in FY2025, +91.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+35.2%** $4.4M to $5.9M · all towns +54.0%	All fixed costs, FY2016–25 **+47.4%** $7.6M to $11.2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Abington's health insurance would have been $5.44 million in FY2025; it was $5.89 million, $451,000 above the path. Its fixed costs would have been $9.52 million in FY2025; it was $11.2 million, $1.71 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2018 (+153%) and FY2020 (–40%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2018 and FY2019 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Abington came to $624,000, 40.7% of the $1.53 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$624,000	40.7%	28.2%
Placed in the town	$624,000	40.7%	42.3%
Everything placed	$624,000	40.7%	45.2%

SCHOOLS

Abington's required school contribution is 2.5% of median household income, 219th highest of 351.

Chapter 70 aid, FY2026 **$15.8M** to the town's district	Required local contribution **$20.1M** FY2026
Share of household income **2.5%** 219th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+32%** after inflation

Abington runs its own school district and also belongs to South Shore; Abington accounts for 15% of that district's foundation budget.

EXPECTED AND ACTUAL

Abington received $4.6 million in earmarks placed in the town and competitive grants over ten years, 82% of the $5.6 million its size, need and institutions predict.

PEERS

Abington ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Abington this town	**42**	**$10,596**	**$233**	**$38.85**	**1.02**	**2.5%**
Lunenburg peer	40	$10,667	$157	$54.36	0.42	2.7%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Norton peer	44	$10,594	$69.10	$29.56	0.74	3.1%
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Acton

Town · Middlesex County · 24,155 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Middlesex · Simon Cataldo 52% of residents
37th Middlesex · Danillo A. Sena 48% of residents

Acton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Acton-Boxborough Regional School District, shared with Boxborough
Minuteman Regional Vocational Technical School District, vocational, shared with Arlington, Bolton, Concord, Dover, Lancaster, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Acton scores 40 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

209th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	58	32	31

Rank under other weightings: 168th to 242nd.

Weighting-dependent: the range crosses the 45–55 band

Acton received less than its share of state aid on three of four measures; its blended score of 40 stays between 35 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

186th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	65	50	38

Rank under other weightings: 163rd to 202nd.

Near fair: between 45 and 55 under every weighting

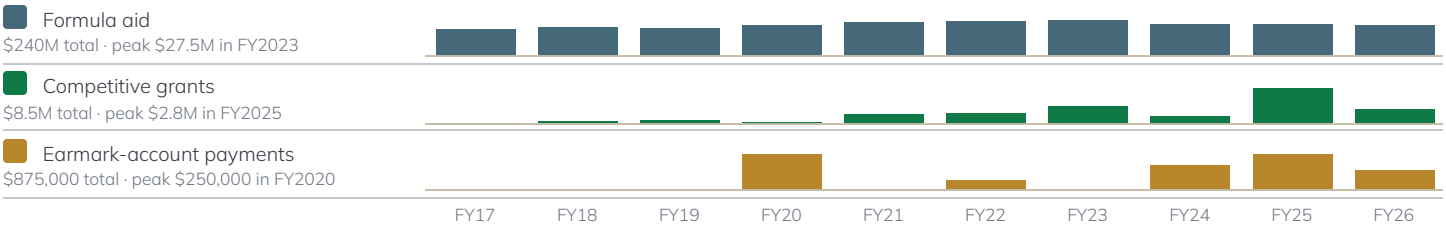
Acton received more than its share of discretionary money on two of four measures; its blended score of 50 stays between 46 and 55 under every weighting tested.

STATE MONEY, FY2017–FY2026

Acton's town government and school districts received $240 million in formula aid and $8.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$240M	**$8.5M**	**$875,000**
$9,929 per resident (179th of 351) · gross	$351 per resident (188th of 351)	$36.24 per resident (124th of 351)

Competitive grants to Acton peaked in FY2025 at $2.8 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $12.7 million, are not shown.

EARMARKS

Acton received $1.3 million in local earmarks naming the town, $1.2 million placed in the town and $1.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	**$1.2M**	**$1.3M**	**Not a member**
$53.20 per resident (139th of 351)	$51.13 per resident (169th of 351)	$53.20 per resident (166th of 351)	35 municipalities had none

Placed in the town: 16 clauses in eight of ten budgets; the most recent in FY2026. Every one names Acton directly.

Names the town includes $50,000 in clauses that name Acton but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Acton (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$300,000	"Acton Community Supper and Food Pantry, Inc. to make improvements to its facility"	Enacted names the town
FY2020	$150,000	"facility improvements at Miracle field in the town of Acton"	Enacted names the town
FY2019	$150,000	"the Discovery Museum, Inc., in the town of Acton"	Enacted names the town
FY2026	$120,000	"Boston Area Gleaners, Incorporated for improvements to Stonefield farm located on Martin street in the town of Acton to continue its work to help..."	Enacted names the town
FY2022	$110,000	"Friends of Gardner Field, Inc. for playground design, a design plan with a civil engineer for the parking lot and storm water treatment and..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Acton received 2.12 times its proportional share of competitive grant awards.

Local road miles **112.7** 71st of 351 · 4.7 per 1,000 residents (252nd of 351)	Town-owned bridges, replacement cost **$12.9M** scored exposure $4.2M · two in poor condition	Road-stream crossings **126** 70th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.9 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **24,254** residents plus seasonal	Core infrastructure index **3.61** roads, culverts, dams, coast, flood, energy

Burden index 2.12; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **139 acres** 1.1% of land area · FY2026	State-owned land PILOT, FY2026 **$112,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$807** statewide $117 · FY2026	New growth per resident **$18,989** FY2017–2025 · 203rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

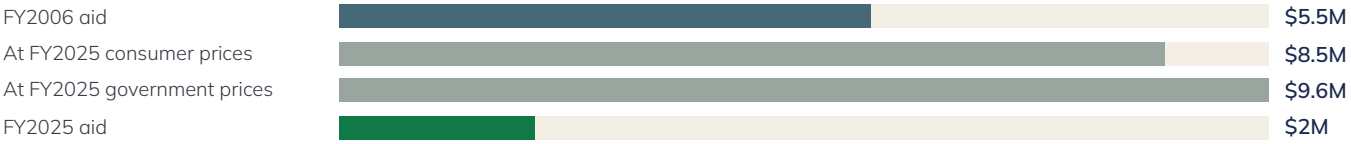
State aid covered 1.6% of Acton's general-fund spending in FY2025, down from 8.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.8%** $5.5M of $62.5M · median town 14.1%	FY2016 **2.8%** $2.4M of $86.7M · median town 12.2%	FY2025 **1.6%** $2M of $123M · median town 11.5%	Net of state charges, FY2025 **1.4%** FY2010: 9.6% · median town 10.0%

Acton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $13.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Acton's state aid did not keep pace with either price measure: FY2025 aid was 76.4% below its FY2006 aid grown by Boston-area consumer prices and 79.0% below grown by the government price index.



Gross state aid went from $5.5 million in FY2006 to $2 million in FY2025, –63.4% in dollars. Flag: in FY2010, $1 million of Acton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+6.2%** $3.1M to $3.3M · all towns +54.0%	All fixed costs, FY2016–25 **+48.8%** $6.9M to $10.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Acton's health insurance would have been $3.92 million in FY2025; it was $3.33 million, $588,000 below the path. Its fixed costs would have been $8.61 million in FY2025; it was $10.3 million, $1.65 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Acton came to $1.1 million, 5.8 times the $193,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	5.8 times	28.2%
Placed in the town	$1.1M	5.5 times	42.3%
Everything placed	$1.1M	5.8 times	45.2%

SCHOOLS

Acton's required school contribution is 3.1% of median household income, 41st highest of 351.

Chapter 70 aid, FY2026 **$14.3M** attributed to the town	Required local contribution **$46.9M** FY2026
Share of household income **3.1%** 41st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Acton has no school district of its own. Its pupils attend Acton-Boxborough and Minuteman; Acton accounts for 83% and 13% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Acton received $11.1 million in earmarks placed in the town and competitive grants over ten years, 32% more than the $8.4 million its size, need and institutions predict.

PEERS

Acton ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Acton this town	**40**	**$9,929**	**$351**	**$51.13**	**2.12**	**3.1%**
Reading peer	35	$8,102	$118	$31.24	1.27	2.6%
Walpole peer	30	$6,864	$139	$32.09	0.61	2.6%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Westford peer	45	$10,874	$400	$41.76	1.34	2.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Acushnet

Town · Bristol County · 10,624 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Bristol · Steven J. Ouellette 64% of residents
10th Bristol · Mark D. Sylvia 36% of residents

Acushnet is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Bristol and Plymouth · Mark C. Montigny

SCHOOL DISTRICTS

Acushnet Public Schools, the town's own district
Old Colony Regional Vocational Technical School District, vocational, shared with Carver, Lakeville, Mattapoisett and Rochester

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Acushnet scores 43 on the Fairness Index for all state aid and 18 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

182nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	40	44	44

Rank under other weightings: 168th to 209th.

Stable low: below 45 under every weighting

Acushnet received less than its share of state aid on all four measures; its blended score of 43 stays between 42 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

18 / 100

322nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
17	16	21	17

Rank under other weightings: 315th to 330th.

Stable low: below 45 under every weighting

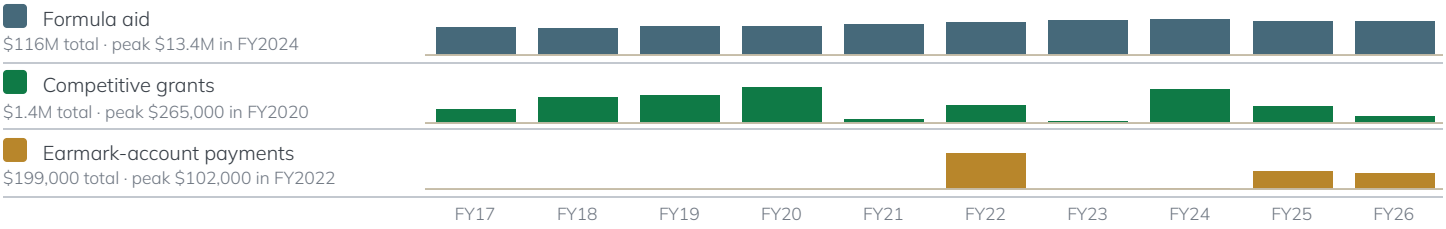
Acushnet received less than its share of discretionary money on all four measures; its blended score of 18 stays between 17 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Acushnet's town government and school districts received $116 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$116M	**$1.4M**	**$199,000**
$10,949 per resident (147th of 351) · gross	$130 per resident (303rd of 351)	$18.72 per resident (210th of 351)

Competitive grants to Acushnet were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.2 million, are not shown.

EARMARKS

Acushnet received $230,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$230,000	**$230,000**	**$230,000**	**Not a member**
$21.65 per resident (262nd of 351)	$21.65 per resident (272nd of 351)	$21.65 per resident (272nd of 351)	35 municipalities had none

Placed in the town: six clauses in five of ten budgets; the most recent in FY2026. Every one names Acushnet directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$80,000	"the Acushnet council on aging"	Enacted names the town
FY2025	$50,000	"sidewalks and pedestrian safety improvements in Acushnet"	Enacted names the town
FY2022	$30,000	"emergency roadway repairs in the town of Acushnet"	Enacted names the town
FY2026	$25,000	"the engineering to address a interior/exterior structural issue at Acushnet elementary school"	Enacted names the town
FY2023	$25,000	"the town of Acushnet for the update of its masterplan"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Acushnet received 60% of its proportional share of competitive grant awards.

Local road miles **59.3** 218th of 351 · 5.6 per 1,000 residents (210th of 351)	Town-owned bridges, replacement cost **$8.6M** scored exposure $1.2M · none in poor condition	Road-stream crossings **41** 293rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **18.4 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **10,680** residents plus seasonal	Core infrastructure index **1.01** roads, culverts, dams, coast, flood, energy

Burden index 0.60; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$79** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$79** statewide $117 · FY2026	New growth per resident **$17,208** FY2017–2025 · 223rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 26.5% of Acushnet's general-fund spending in FY2025, down from 37.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **37.9%** $7.7M of $20.4M · median town 14.1%	FY2016 **31.1%** $7.8M of $25.2M · median town 12.2%	FY2025 **26.5%** $9.4M of $35.2M · median town 11.5%	Net of state charges, FY2025 **25.0%** FY2010: 35.3% · median town 10.0%

Acushnet's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Acushnet's state aid did not keep pace with either price measure: FY2025 aid was 21.9% below its FY2006 aid grown by Boston-area consumer prices and 30.6% below grown by the government price index.

Gross state aid went from $7.7 million in FY2006 to $9.4 million in FY2025, +21.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+79.6%** $1.2M to $2.2M · all towns +54.0%	All fixed costs, FY2016–25 **+70.7%** $2.7M to $4.6M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Acushnet's health insurance would have been $1.50 million in FY2025; it was $2.16 million, $657,000 above the path. Its fixed costs would have been $3.39 million in FY2025; it was $4.63 million, $1.24 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Acushnet came to $185,000, 19.3% of the $957,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$185,000	19.3%	28.2%
Placed in the town	$185,000	19.3%	42.3%
Everything placed	$185,000	19.3%	45.2%

SCHOOLS

Acushnet's required school contribution is 3.2% of median household income, 38th highest of 351.

Chapter 70 aid, FY2026 **$9.4M** to the town's district	Required local contribution **$11.9M** FY2026
Share of household income **3.2%** 38th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–1%** after inflation

Acushnet runs its own school district and also belongs to Old Colony and Bristol County; Acushnet accounts for 35% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Acushnet received $1.7 million in earmarks placed in the town and competitive grants over ten years, 31% of the $5.3 million its size, need and institutions predict.

PEERS

Acushnet ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Acushnet this town	**43**	**$10,949**	**$130**	**$21.65**	**0.60**	**3.2%**
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Townsend peer	54	$15,988	$300	$29.35	0.75	2.3%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Adams

Town · Berkshire County · 8,074 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Hoosac Valley Regional School District, shared with Cheshire
Northern Berkshire Regional Vocational Technical School District, vocational, shared with Cheshire, Clarksburg, Florida, Lanesborough, Monroe, North Adams, Savoy and Williamstown

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Adams scores 64 on the Fairness Index for all state aid and 84 for discretionary money. Fifty is a fair share.

ALL STATE AID

64 / 100

27th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	55	66	68

Rank under other weightings: 21st to 42nd.

Stable high: above 55 under every weighting

Adams received more than its share of state aid on all four measures; its blended score of 64 stays between 62 and 66 under every weighting tested.

DISCRETIONARY MONEY ONLY

84 / 100

62nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
86	79	83	86

Rank under other weightings: 55th to 65th.

Stable high: above 55 under every weighting

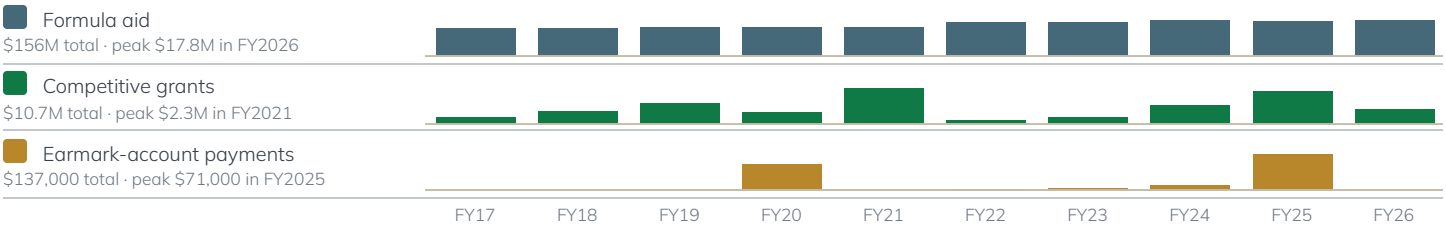
Adams received more than its share of discretionary money on all four measures; its blended score of 84 stays between 82 and 85 under every weighting tested.

STATE MONEY, FY2017–FY2026

Adams's town government and school districts received $156 million in formula aid and $10.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$156M	**$10.7M**	**$137,000**
$19,320 per resident (30th of 351) · gross	$1,327 per resident (61st of 351)	$17.00 per resident (220th of 351)

Competitive grants to Adams peaked in FY2021 at $2.3 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18.5 million, are not shown.

EARMARKS

Adams received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	**$225,000**	**$225,000**	**Not a member**
$27.87 per resident (237th of 351)	$27.87 per resident (250th of 351)	$27.87 per resident (251st of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2022. Every one names Adams directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$125,000	"road improvements for the Howland avenue section of Route 8 in the town of Adams"	Enacted names the town
FY2020	$50,000	"the Susan B. Anthony Memorial Park in the town of Adams"	Enacted names the town
FY2018	$50,000 (split two ways)	"grants to the Adams-Cheshire regional school district for the purpose of offsetting increased costs"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Adams received 2.22 times its proportional share of competitive grant awards.

Local road miles **54.4** 234th of 351 · 6.7 per 1,000 residents (165th of 351)	Town-owned bridges, replacement cost **$44.1M** scored exposure $19.4M · seven in poor condition	Road-stream crossings **88** 147th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.9 sq mi** 39% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,074** residents plus seasonal	Core infrastructure index **0.44** roads, culverts, dams, coast, flood, energy

Burden index 2.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,108 acres** 34.9% of land area · FY2026	State-owned land PILOT, FY2026 **$115,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$22.47** statewide $117 · FY2026	New growth per resident **$6,331** FY2017–2025 · 348th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.3% of Adams's general-fund spending in FY2025, down from 18.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.6%** $2.2M of $11.5M · median town 14.1%	FY2016 **16.8%** $2.4M of $14.4M · median town 12.2%	FY2025 **17.3%** $3.2M of $18.2M · median town 11.5%	Net of state charges, FY2025 **17.0%** FY2010: 17.9% · median town 10.0%

Adams's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $11.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Adams's state aid did not keep pace with either price measure: FY2025 aid was 5.4% below its FY2006 aid grown by Boston-area consumer prices and 15.9% below grown by the government price index.

Gross state aid went from $2.2 million in FY2006 to $3.2 million in FY2025, +46.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–6.5%** $935,000 to $874,000 · all towns +54.0%	All fixed costs, FY2016–25 **+32.8%** $2.1M to $2.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Adams's health insurance would have been $1.17 million in FY2025; it was $874,000, $294,000 below the path. Its fixed costs would have been $2.60 million in FY2025; it was $2.77 million, $165,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Adams's reported health insurance fell from $935,000 in FY2016 to $874,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$225,000	no increase	28.2%
Placed in the town	$225,000	no increase	42.3%
Everything placed	$225,000	no increase	45.2%

SCHOOLS

Adams's required school contribution is 2.2% of median household income, 290th highest of 351.

Chapter 70 aid, FY2026 **$11.9M** attributed to the town	Required local contribution **$5.2M** FY2026
Share of household income **2.2%** 290th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Adams has no school district of its own. Its pupils attend Hoosac Valley and Northern Berkshire; Adams accounts for 74% and 28% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Adams received $11.4 million in earmarks placed in the town and competitive grants over ten years, 93% of the $12.3 million its size, need and institutions predict.

PEERS

Adams ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Adams this town	**64**	**$19,320**	**$1,327**	**$27.87**	**2.22**	**2.2%**
Orange peer	66	$23,109	$1,214	$123	2.59	3.0%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Ware peer	61	$18,604	$846	$22.39	1.01	2.4%
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Agawam

City · Hampden County · 28,539 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Hampden · Nicholas A. Boldyga 87% of residents

6th Hampden · Michael J. Finn 13% of residents

Agawam is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampden and Hampshire · John C. Velis

SCHOOL DISTRICTS

Agawam Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Agawam scores 45 on the Fairness Index for all state aid and 33 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

162nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	40	48	48

Rank under other weightings: 140th to 187th.

Weighting-dependent: the range crosses the 45–55 band

Agawam received less than its share of state aid on all four measures; its blended score of 45 stays between 44 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

33 / 100

255th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	28	38	35

Rank under other weightings: 243rd to 269th.

Stable low: below 45 under every weighting

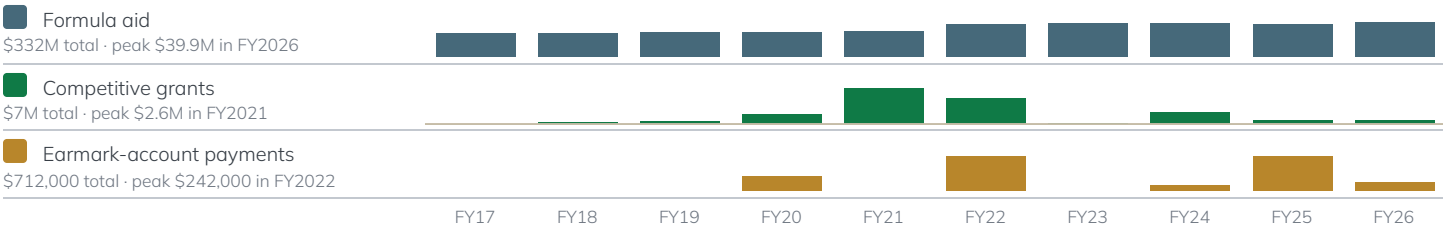
Agawam received less than its share of discretionary money on all four measures; its blended score of 33 stays between 31 and 35 under every weighting tested.

STATE MONEY, FY2017–FY2026

Agawam's town government and school districts received $332 million in formula aid and $7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$332M	$7M	$712,000
$11,619 per resident (136th of 351) · gross	$247 per resident (228th of 351)	$24.96 per resident (175th of 351)

Competitive grants to Agawam peaked in FY2021 at $2.6 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.9 million, are not shown.

EARMARKS

Agawam received $666,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$666,000	$666,000	$666,000	Not a member
$23.34 per resident (255th of 351)	$23.34 per resident (264th of 351)	$23.34 per resident (265th of 351)	35 municipalities had none

Placed in the town: 16 clauses in nine of ten budgets; the most recent in FY2026. Every one names Agawam directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$100,000	"facility construction, upgrades or repairs for public schools in the city known as the town of Agawam"	Enacted names the town
FY2020	$90,000	"an emergency generator in the city known as the town of Agawam"	Enacted names the town
FY2026	$50,000	"the Agawam senior center to improve transportation and accessibility by purchasing or updating its transportation services"	Enacted names the town
FY2025	$50,000	"the council on aging in the city know as the town of Agawam for new furniture, equipment and improvements to the patio area"	Enacted names the town
FY2024	$50,000	"the town of Agawam to enhance school building security"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Agawam received 39% of its proportional share of competitive grant awards.

Local road miles **132.8** 47th of 351 · 4.7 per 1,000 residents (254th of 351)	Town-owned bridges, replacement cost **$10.4M** scored exposure $4.9M · none in poor condition	Road-stream crossings **143** 51st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **23.3 sq mi** 6% state-owned	Seasonal homes **0%** share of housing units	Peak service population **28,539** residents plus seasonal	Core infrastructure index **0.74** roads, culverts, dams, coast, flood, energy

Burden index 0.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **837 acres** 5.6% of land area · FY2026	State-owned land PILOT, FY2026 **$160,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$191** statewide $117 · FY2026	New growth per resident **$11,938** FY2017–2025 · 294th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 29.0% of Agawam's general-fund spending in FY2025, up from 26.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **26.9%** $16.4M of $60.9M · median town 14.1%	FY2016 **29.0%** $24.1M of $82.9M · median town 12.2%	FY2025 **29.0%** $31.9M of $110M · median town 11.5%	Net of state charges, FY2025 **26.9%** FY2010: 26.4% · median town 10.0%

Agawam's state aid kept pace with both price measures: FY2025 aid was 25.9% above its FY2006 aid grown by Boston-area consumer prices and 11.9% above grown by the government price index.

Gross state aid went from $16.4 million in FY2006 to $31.9 million in FY2025, +95.3% in dollars. Flag: in FY2010, $979,000 of Agawam's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+87.5%** $9.5M to $17.9M · all towns +54.0%	All fixed costs, FY2016–25 **+52.8%** $15.2M to $23.2M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Agawam's health insurance would have been $11.9 million in FY2025; it was $17.9 million, $5.97 million above the path. Its fixed costs would have been $19 million in FY2025; it was $23.2 million, $4.24 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (+44%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Agawam came to $601,000, 7.2% of the $8.34 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$601,000	7.2%	28.2%
Placed in the town	$601,000	7.2%	42.3%
Everything placed	$601,000	7.2%	45.2%

SCHOOLS

Agawam's required school contribution is 2.7% of median household income, 142nd highest of 351.

Chapter 70 aid, FY2026 **$27.2M** to the town's district	Required local contribution **$28.1M** FY2026
Share of household income **2.7%** 142nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Agawam runs its own school district.

EXPECTED AND ACTUAL

Agawam received $7.8 million in earmarks placed in the town and competitive grants over ten years, 69% of the $11.3 million its size, need and institutions predict.

PEERS

Agawam ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Agawam this town	**45**	**$11,619**	**$247**	**$23.34**	**0.39**	**2.7%**
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Ludlow peer	42	$10,596	$407	$132	1.85	2.8%
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Alford

Town · Berkshire County · 433 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Southern Berkshire Regional School District, shared with Egremont, Monterey, New Marlborough and Sheffield

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Alford scores 43 on the Fairness Index for all state aid and 84 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

181st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	49	44	41

Rank under other weightings: 171st to 201st.

Stable low: below 45 under every weighting

Alford received less than its share of state aid on all four measures; its blended score of 43 stays between 41 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

84 / 100

59th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
86	90	74	87

Rank under other weightings: 54th to 68th.

Stable high: above 55 under every weighting

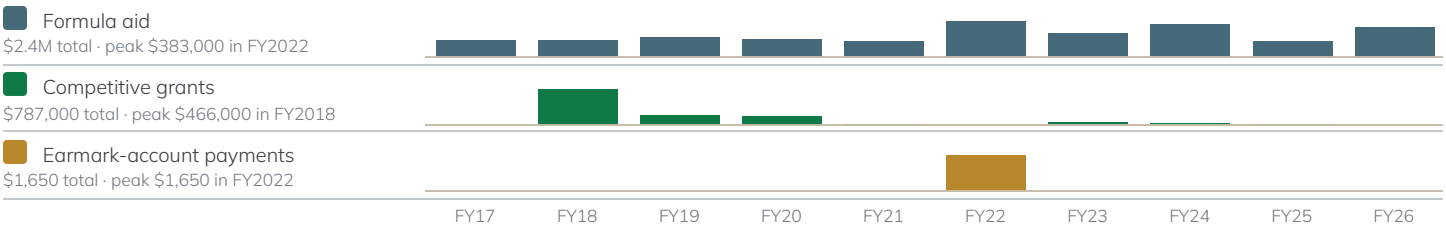
Alford received more than its share of discretionary money on all four measures; its blended score of 84 stays between 82 and 87 under every weighting tested.

STATE MONEY, FY2017–FY2026

Alford's town government and school districts received $2.4 million in formula aid and $787,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.4M	$787,000	$1,650
$5,565 per resident (338th of 351) · gross	$1,817 per resident (50th of 351)	$3.81 per resident (303rd of 351)

Competitive grants to Alford peaked in FY2018 at $466,000, 59% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 433 residents, a single payment moves Alford's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $254,000, are not shown.

EARMARKS

No local earmark was placed in Alford in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $1,650 in payments to Alford's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Alford.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Alford's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Tyringham	$0	$0	$0	$0
Monterey	$0	$0	$0	$0
Aquinnah	$100,000	$100,000	$100,000	$150
Mount Washington	$0	$0	$0	$0
New Marlborough	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Alford received 13% of its proportional share of competitive grant awards.

Local road miles **17.4** 342nd of 351 · 40.1 per 1,000 residents (32nd of 351)	Town-owned bridges, replacement cost **$6.2M** scored exposure $1.4M · two in poor condition	Road-stream crossings **36** 304th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **11.5 sq mi** 0% state-owned	Seasonal homes **34%** share of housing units	Peak service population **696** residents plus seasonal	Core infrastructure index **0.33** roads, culverts, dams, coast, flood, energy

Burden index 0.13; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$54,227** FY2017–2025 · 30th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.5% of Alford's general-fund spending in FY2025, down from 1.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **1.7%** $16,000 of $972,000 · median town 14.1%	FY2016 **1.2%** $15,000 of $1.3M · median town 12.2%	FY2025 **1.5%** $30,000 of $2M · median town 11.5%	Net of state charges, FY2025 **1.5%** FY2010: 1.1% · median town 10.0%

Alford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $66,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Alford's state aid kept pace with both price measures: FY2025 aid was 20.2% above its FY2006 aid grown by Boston-area consumer prices and 6.8% above grown by the government price index.

Gross state aid went from $16,000 in FY2006 to $30,000 in FY2025, +86.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+116.1%** $45,000 to $98,000 · all towns +54.0%	All fixed costs, FY2016–25 **+92.3%** $102,000 to $196,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Alford's health insurance would have been $56,000 in FY2025; it was $98,000, $41,000 above the path. Its fixed costs would have been $127,000 in FY2025; it was $196,000, $69,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2018 (+71%) and FY2022 (+41%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Alford came to $0, 0.0% of the $52,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Alford's required school contribution is 0.9% of median household income, the sixth-lowest of 351.

Chapter 70 aid, FY2026 **$73,000** attributed to the town	Required local contribution **$254,000** FY2026
Share of household income **0.9%** 346th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+19%** after inflation

Alford has no school district of its own. Its pupils attend Southern Berkshire; Alford accounts for 3% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide. Alford had 20 resident pupils in FY2026, so per-pupil changes swing from year to year.

EXPECTED AND ACTUAL

Alford received $787,000 in earmarks placed in the town and competitive grants over ten years, 72% of the $1.1 million its size, need and institutions predict.

PEERS

Alford is one of seven municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Alford this town	**43**	**$5,565**	**$1,817**	**$0**	**0.13**	**0.9%**
Tyringham peer · lowest in class of 30	34	$4,388	$85.59	$0	0.28	1.0%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
Mount Washington peer	62	$22,393	$6,365	$0	1.07	0.4%
New Marlborough peer	49	$8,719	$3,098	$0	2.06	2.0%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Amesbury

City · Essex County · 17,403 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Essex · Dawne Shand 68% of residents
14th Essex · Adrianne Pusateri Ramos 32% of residents

Amesbury is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold

SCHOOL DISTRICTS

Amesbury Public Schools, the city's own district
Whittier Regional Vocational Technical School District, vocational, shared with Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Amesbury scores 39 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

218th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	41	44	32

Rank under other weightings: 199th to 255th.

Stable low: below 45 under every weighting

Amesbury received less than its share of state aid on all four measures; its blended score of 39 stays between 38 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

114th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	70	72	62

Rank under other weightings: 105th to 121st.

Stable high: above 55 under every weighting

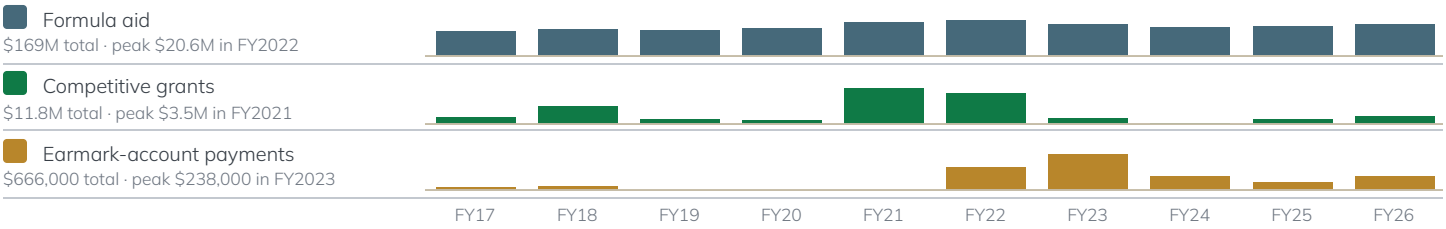
Amesbury received more than its share of discretionary money on all four measures; its blended score of 69 stays between 67 and 70 under every weighting tested.

STATE MONEY, FY2017–FY2026

Amesbury's town government and school districts received $169 million in formula aid and $11.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$169M	$11.8M	$666,000
$9,706 per resident (188th of 351) · gross	$676 per resident (115th of 351)	$38.26 per resident (116th of 351)

Competitive grants to Amesbury peaked in FY2021 at $3.5 million, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $14.6 million, are not shown.

EARMARKS

Amesbury received $1.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	$1.1M	$1.1M	Not a member
$64.69 per resident (100th of 351)	$64.69 per resident (129th of 351)	$64.69 per resident (135th of 351)	35 municipalities had none

Placed in the town: 39 clauses in ten of ten budgets; the most recent in FY2026. Every one names Amesbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the city of Amesbury for improvements to athletic fields"	Enacted names the town
FY2022	$100,000	"parking lot and curb renovations at Lake Gardner Beach in the city of Amesbury"	Enacted names the town
FY2024	$75,000	"the city of Amesbury for improvements to the playground at the Charles C. Cashman elementary school"	Enacted names the town
FY2025	$50,000	"Our Neighbor's Table, Inc. in the city of Amesbury to provide free groceries to those who are food insecure across the Merrimack valley"	Enacted names the town
FY2025	$50,000	"the city of Amesbury for lighting improvements in the downtown region of the city"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Amesbury received 2.17 times its proportional share of competitive grant awards.

Local road miles **71.7** 183rd of 351 · 4.1 per 1,000 residents (275th of 351)	Town-owned bridges, replacement cost **$16.7M** scored exposure $4.5M · one in poor condition	Road-stream crossings **81** 161st of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **12.3 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **17,545** residents plus seasonal	Core infrastructure index **1.07** roads, culverts, dams, coast, flood, energy

Burden index 2.17; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$17,257** FY2017–2025 · 221st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.7% of Amesbury's general-fund spending in FY2025, down from 29.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **29.7%** $12.8M of $43M · median town 14.1%	FY2016 **22.0%** $12.1M of $55M · median town 12.2%	FY2025 **17.7%** $13.7M of $77.4M · median town 11.5%	Net of state charges, FY2025 **11.6%** FY2010: 20.2% · median town 10.0%

Amesbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $734,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Amesbury's state aid did not keep pace with either price measure: FY2025 aid was 30.8% below its FY2006 aid grown by Boston-area consumer prices and 38.5% below grown by the government price index.

Gross state aid went from $12.8 million in FY2006 to $13.7 million in FY2025, +7.4% in dollars. Flag: in FY2010, $767,000 of Amesbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+47.1%** $2.3M to $3.4M · all towns +54.0%	All fixed costs, FY2016–25 **+48.4%** $5.2M to $7.7M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Amesbury's health insurance would have been $2.93 million in FY2025; it was $3.45 million, $520,000 above the path. Its fixed costs would have been $6.48 million in FY2025; it was $7.70 million, $1.22 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Amesbury came to $933,000, 84.5% of the $1.10 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$933,000	84.5%	28.2%
Placed in the town	$933,000	84.5%	42.3%
Everything placed	$933,000	84.5%	45.2%

SCHOOLS

Amesbury's required school contribution is 2.8% of median household income, 123rd highest of 351.

Chapter 70 aid, FY2026 **$10.7M** to the town's district	Required local contribution **$22.1M** FY2026
Share of household income **2.8%** 123rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Amesbury runs its own school district and also belongs to Whittier; Amesbury accounts for 9% of that district's foundation budget.

EXPECTED AND ACTUAL

Amesbury received $13.1 million in earmarks placed in the town and competitive grants over ten years, 27% more than the $10.3 million its size, need and institutions predict.

PEERS

Amesbury ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Amesbury this town	**39**	**$9,706**	**$676**	**$64.69**	**2.17**	**2.8%**
Winthrop peer	40	$8,903	$365	$158	0.60	2.4%
Hudson peer	42	$10,896	$229	$66.49	0.91	3.1%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Amherst

City · Hampshire County · 38,182 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Hampshire · Mindy Domb

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Amherst Public Schools, the city's own district
Amherst-Pelham Regional School District, shared with Leverett, Pelham and Shutesbury

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Amherst scores 36 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

253rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	24	59	26

Rank under other weightings: 184th to 321st.

Stable low: below 45 under every weighting

Amherst received less than its share of state aid on three of four measures; its blended score of 36 stays between 29 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

113th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	61	79	63

Rank under other weightings: 99th to 128th.

Stable high: above 55 under every weighting

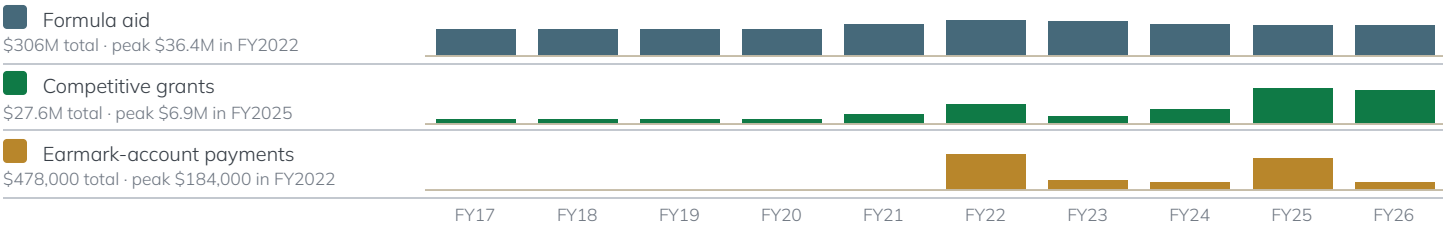
Amherst received more than its share of discretionary money on all four measures; its blended score of 69 stays between 65 and 73 under every weighting tested.

STATE MONEY, FY2017–FY2026

Amherst's town government and school districts received $306 million in formula aid and $27.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$306M	**$27.6M**	**$478,000**
$8,017 per resident (255th of 351) · gross	$722 per resident (109th of 351)	$12.52 per resident (244th of 351)

Competitive grants to Amherst peaked in FY2025 at $6.9 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $22.8 million, are not shown.

EARMARKS

Amherst received $2.4 million in local earmarks naming the town, $3.2 million placed in the town and $3.6 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.4M	**$3.2M**	**$3.6M**	**Not a member**
$62.88 per resident (106th of 351)	$84.88 per resident (95th of 351)	$94.31 per resident (88th of 351)	35 municipalities had none

Placed in the town: 41 clauses in ten of ten budgets; the most recent in FY2026. $2 million came in clauses that name Amherst; the other $1.2 million went to organizations based in Amherst, some of which serve a wider area.

Names the town includes $360,000 in clauses that name Amherst but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $360,000 in eight clauses for state facilities located in Amherst (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$200,000	"Craig's Doors-A Home Association, Inc. in the town of Amherst"	Enacted names the town
FY2017	$200,000	"Craig's Doors, A Home Association, Inc. in the town of Amherst"	Enacted names the town
FY2023	$180,000	"the Center for Energy Efficiency and Renewable Energy at the University of Massachusetts at Amherst to fund the UMass Clean Energy Corps to provide…"	Enacted names the town
FY2019	$175,000	"Craig's Doors – A Home Association, Inc. in the town of Amherst"	Enacted names the town
FY2025	$125,000	"purchase turnout gear and other equipment for Amherst fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Amherst received 2.44 times its proportional share of competitive grant awards.

Local road miles **105.5** 79th of 351 · 2.8 per 1,000 residents (324th of 351)	Town-owned bridges, replacement cost **$24.6M** scored exposure $8.9M · one in poor condition	Road-stream crossings **118** 80th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **27.6 sq mi** 6% state-owned	Seasonal homes **0%** share of housing units	Peak service population **38,288** residents plus seasonal	Core infrastructure index **1.37** roads, culverts, dams, coast, flood, energy

Burden index 2.44; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,838 acres** 10.4% of land area · FY2026	State-owned land PILOT, FY2026 **$334,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$182** statewide $117 · FY2026	New growth per resident **$10,211** FY2017–2025 · 321st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 21.3% of Amherst's general-fund spending in FY2025, down from 23.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.2%** $14.3M of $61.7M · median town 14.1%	FY2016 **17.0%** $14.7M of $86.3M · median town 12.2%	FY2025 **21.3%** $18.4M of $86.4M · median town 11.5%	Net of state charges, FY2025 **17.3%** FY2010: 16.6% · median town 10.0%

Amherst's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Amherst's state aid did not keep pace with either price measure: FY2025 aid was 16.9% below its FY2006 aid grown by Boston-area consumer prices and 26.2% below grown by the government price index.

Gross state aid went from $14.3 million in FY2006 to $18.4 million in FY2025, +28.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–99.1%** $19.4M to $179,000 · all towns +54.0%	All fixed costs, FY2016–25 **–63.9%** $24.4M to $8.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Amherst's health insurance would have been $24.2 million in FY2025; it was $179,000, $24.1 million below the path. Its fixed costs would have been $30.4 million in FY2025; it was $8.79 million, $21.6 million below the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (–57%); health insurance changed by more than 30% in one year in FY2019 (–74%), FY2020 (–51%), FY2023 (+33%) and FY2025 (–95%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Amherst's reported health insurance fell from $19.4 million in FY2016 to $179,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.3M	no increase	28.2%
Placed in the town	$3M	no increase	42.3%
Everything placed	$3.3M	no increase	45.2%

SCHOOLS

Amherst's required school contribution is 3.7% of median household income, 10th highest of 351.

Chapter 70 aid, FY2026 **$14.3M** to the town's district	Required local contribution **$23.7M** FY2026
Share of household income **3.7%** 10th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Amherst runs its own district for some grades and belongs to Amherst-Pelham for others; Amherst accounts for 79% of that district's foundation budget.

EXPECTED AND ACTUAL

Amherst received $34.1 million in earmarks placed in the town and competitive grants over ten years, 66% more than the $20.5 million its size, need and institutions predict.

PEERS

Amherst ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Amherst this town	**36**	**$8,017**	**$722**	**$84.88**	**2.44**	**3.7%**
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Chelsea peer	77	$32,370	$919	$147	3.69	2.6%
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Taunton peer	59	$17,881	$149	$94.33	0.82	2.7%
Salem best in class of 30	46	$10,823	$853	$157	2.62	2.9%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Andover

Town · Essex County · 36,652 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

18th Essex · Tram T. Nguyen 74% of residents
17th Essex · Frank A. Moran 26% of residents

Andover is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold

SCHOOL DISTRICTS

Andover Public Schools, the town's own district
Greater Lawrence Regional Vocational Technical School District, vocational, shared with Lawrence, Methuen and North Andover

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Andover scores 28 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

334th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	42	21	23

Rank under other weightings: 310th to 342nd.

Stable low: below 45 under every weighting

Andover received less than its share of state aid on all four measures; its blended score of 28 stays between 24 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

328th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
14	28	12	13

Rank under other weightings: 316th to 332nd.

Stable low: below 45 under every weighting

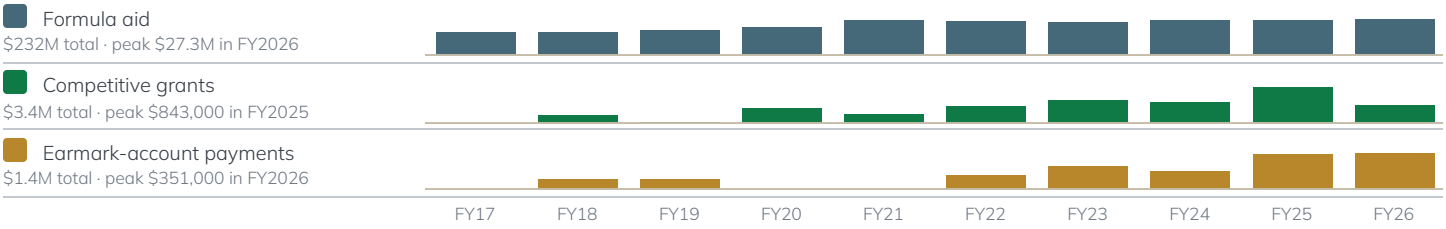
Andover received less than its share of discretionary money on all four measures; its blended score of 17 stays between 14 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Andover's town government and school districts received $232 million in formula aid and $3.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$232M	$3.4M	$1.4M
$6,322 per resident (327th of 351) · gross	$94.07 per resident (327th of 351)	$38.52 per resident (115th of 351)

Competitive grants to Andover peaked in FY2025 at $843,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $37.3 million, are not shown.

EARMARKS

Andover received $1.6 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.6M	$1.6M	$1.6M	Not a member
$42.90 per resident (167th of 351)	$42.90 per resident (188th of 351)	$42.90 per resident (191st of 351)	35 municipalities had none

Placed in the town: 32 clauses in ten of ten budgets; the most recent in FY2026. Every one names Andover directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$150,000	"the Andover Senior Center in the town of Andover for rehabilitation of their facility after the Merrimack Valley gas fires of September 2018"	Enacted names the town
FY2026	$100,000	"the town of Andover for any costs related to ADA improvements at the municipal complex, including the town hall, school administration, senior..."	Enacted names the town
FY2024	$100,000	"sidewalks and pedestrian safety improvements in the town of Andover"	Enacted names the town
FY2019	$100,000	"the town of Andover for IT infrastructure for the town's 311 Customer Service Project"	Enacted names the town
FY2019	$100,000	"the town of Andover for the final phase of the route 133 corridor project plan development project"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Andover received 79% of its proportional share of competitive grant awards.

Local road miles **190.2** 20th of 351 · 5.2 per 1,000 residents (220th of 351)	Town-owned bridges, replacement cost **$8.3M** scored exposure $3.1M · none in poor condition	Road-stream crossings **242** 3rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.8 sq mi** 5% state-owned	Seasonal homes **2%** share of housing units	Peak service population **37,386** residents plus seasonal	Core infrastructure index **0.40** roads, culverts, dams, coast, flood, energy

Burden index 0.79; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **857 acres** 4.3% of land area · FY2026	State-owned land PILOT, FY2026 **$379,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$442** statewide $117 · FY2026	New growth per resident **$29,179** FY2017–2025 · 110th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.5% of Andover's general-fund spending in FY2025, down from 8.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.6%** $9.8M of $114M · median town 14.1%	FY2016 **8.0%** $12.8M of $160M · median town 12.2%	FY2025 **7.5%** $17.3M of $230M · median town 11.5%	Net of state charges, FY2025 **7.2%** FY2010: 6.1% · median town 10.0%

Andover's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $223,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Andover's state aid kept pace with both price measures: FY2025 aid was 13.6% above its FY2006 aid grown by Boston-area consumer prices and 1.0% above grown by the government price index.

Gross state aid went from $9.8 million in FY2006 to $17.3 million in FY2025, +76.2% in dollars. Flag: in FY2010, $1.6 million of Andover's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.7%** $23.7M to $35.5M · all towns +54.0%	All fixed costs, FY2016–25 **+35.3%** $33.2M to $44.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Andover's health insurance would have been $29.6 million in FY2025; it was $35.5 million, $5.88 million above the path. Its fixed costs would have been $41.4 million in FY2025; it was $44.9 million, $3.46 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2022 (–64%) and FY2023 (+167%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2022 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Andover came to $1.4 million, 11.8% of the $11.8 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	11.8%	28.2%
Placed in the town	$1.4M	11.8%	42.3%
Everything placed	$1.4M	11.8%	45.2%

SCHOOLS

Andover's required school contribution is 2.8% of median household income, 140th highest of 351.

Chapter 70 aid, FY2026 **$15.6M** to the town's district	Required local contribution **$63.2M** FY2026
Share of household income **2.8%** 140th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Andover runs its own school district and also belongs to Greater Lawrence; Andover accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

Andover received $9.8 million in earmarks placed in the town and competitive grants over ten years, 15% more than the $8.5 million its size, need and institutions predict.

PEERS

Andover ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Andover this town	**28**	**$6,322**	**$94.07**	**$42.90**	**0.79**	**2.8%**
Needham peer	28	$6,664	$33.58	$150	0.21	2.5%
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Milton peer · best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Scituate lowest in class of 30	34	$7,209	$711	$18.25	3.23	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Aquinnah

Town · Dukes County · 666 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Martha's Vineyard Regional School District, shared with Chilmark, Edgartown, Oak Bluffs, Tisbury and West Tisbury

Up-Island Regional School District, shared with Chilmark and West Tisbury

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

Aquinnah scores 38 on the Fairness Index for all state aid and 64 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

242nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	48	40	27

Rank under other weightings: 212th to 256th.

Stable low: below 45 under every weighting

Aquinnah received less than its share of state aid on all four measures; its blended score of 38 stays between 34 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

64 / 100

126th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
73	82	39	63

Rank under other weightings: 102nd to 154th.

Stable high: above 55 under every weighting

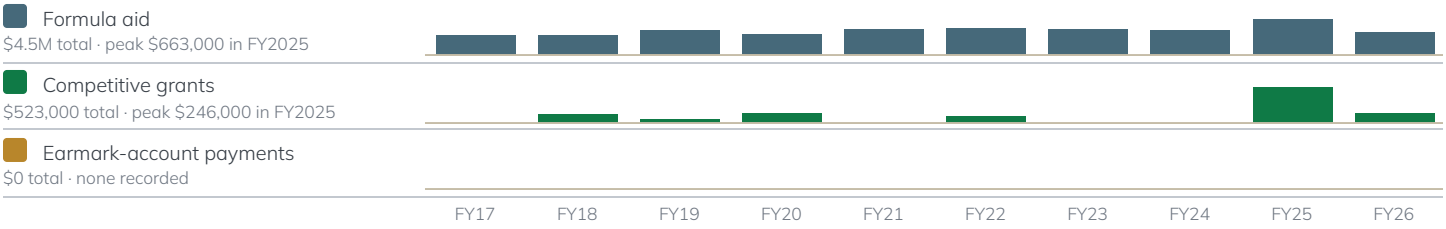
Aquinnah received more than its share of discretionary money on three of four measures; its blended score of 64 stays between 56 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Aquinnah's town government and school districts received $4.5 million in formula aid and $523,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$4.5M	**$523,000**	**$0**
$6,830 per resident (298th of 351) · gross	$786 per resident (96th of 351)	$0 per resident (339th of 351)

Competitive grants to Aquinnah peaked in FY2025 at $246,000, 47% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 666 residents, a single payment moves Aquinnah's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.8 million, are not shown.

EARMARKS

Aquinnah received $100,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$100,000	**$100,000**	**$100,000**	**Not a member**
$150 per resident (16th of 351)	$150 per resident (25th of 351)	$150 per resident (31st of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2017. Every one names Aquinnah directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$100,000	"improvements at Aquinnah Circle in the town of Aquinnah"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Aquinnah received 2.09 times its proportional share of competitive grant awards.

Local road miles **9.2** 350th of 351 · 13.8 per 1,000 residents (75th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **38** 300th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **5.3 sq mi** 0% state-owned	Seasonal homes **48%** share of housing units	Peak service population **1,376** residents plus seasonal	Core infrastructure index **2.03** roads, culverts, dams, coast, flood, energy

Burden index 2.09; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$3,392** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,413** statewide $117 · FY2026	New growth per resident **$58,963** FY2017–2025 · 26th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 0.1% of Aquinnah's general-fund spending in FY2025, down from 0.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **0.4%** $8,776 of $2.4M · median town 14.1%	FY2016 **0.2%** $6,473 of $4M · median town 12.2%	FY2025 **0.1%** $11,000 of $7.4M · median town 11.5%	Net of state charges, FY2025 **-0.7%** FY2010: -1.9% · median town 10.0%

Aquinnah's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $182,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Aquinnah's state aid did not keep pace with either price measure: FY2025 aid was 20.5% below its FY2006 aid grown by Boston-area consumer prices and 29.4% below grown by the government price index.

Gross state aid went from $8,776 in FY2006 to $11,000 in FY2025, +23.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+68.6%** $236,000 to $397,000 · all towns +54.0%	All fixed costs, FY2016–25 **+99.3%** $405,000 to $808,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Aquinnah's health insurance would have been $294,000 in FY2025; it was $397,000, $103,000 above the path. Its fixed costs would have been $506,000 in FY2025; it was $808,000, $302,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (+35%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Aquinnah came to $100,000, 61.9% of the $162,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$100,000	61.9%	28.2%
Placed in the town	$100,000	61.9%	42.3%
Everything placed	$100,000	61.9%	45.2%

SCHOOLS

Aquinnah's required school contribution is 1.9% of

EXPECTED AND ACTUAL

Aquinnah received $623,000 in earmarks placed in the town and competitive grants over ten years, 21% of the $2.9 million its size, need and institutions predict.

median household income, 314th highest of 351.

Chapter 70 aid, FY2026 **$180,000** attributed to the town	Required local contribution **$693,000** FY2026
Share of household income **1.9%** 314th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–40%** after inflation

Aquinnah has no school district of its own. Its pupils attend Upisland and Martha's Vineyard; Aquinnah accounts for 12% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Aquinnah ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Aquinnah this town	**38**	**$6,830**	**$786**	**$150**	**2.09**	**1.9%**
Monterey peer · lowest in class of 30	67	$11,798	$7,628	$0	3.68	1.8%
Alford peer	43	$5,565	$1,817	$0	0.13	0.9%
Otis peer	43	$6,679	$2,109	$0	1.01	2.2%
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
New Marlborough peer	49	$8,719	$3,098	$0	2.06	2.0%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Arlington

Town · Middlesex County · 46,350 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

23rd Middlesex · Sean Garballey 72% of residents
24th Middlesex · David M. Rogers 28% of residents

Arlington is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fourth Middlesex · Cindy F. Friedman

SCHOOL DISTRICTS

Arlington Public Schools, the town's own district
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Bolton, Concord, Dover, Lancaster, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Arlington scores 32 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

288th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	41	28	31

Rank under other weightings: 275th to 302nd.

Stable low: below 45 under every weighting

Arlington received less than its share of state aid on all four measures; its blended score of 32 stays between 30 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

239th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	43	42	32

Rank under other weightings: 225th to 250th.

Stable low: below 45 under every weighting

Arlington received less than its share of discretionary money on all four measures; its blended score of 37 stays between 33 and 40 under every weighting tested.

STATE MONEY, FY2017–FY2026

Arlington's town government and school districts received $331 million in formula aid and $8.5 million in competitive grants over ten years.

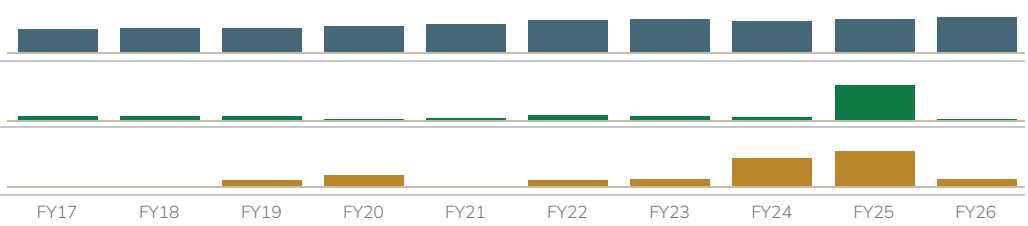
Formula aid	Competitive grants	Earmark-account payments
$331M	**$8.5M**	**$1.5M**
$7,131 per resident (286th of 351) · gross	$184 per resident (262nd of 351)	$31.54 per resident (143rd of 351)

Competitive grants to Arlington peaked in FY2025 at $4.2 million, 49% of the ten-year total.

Formula aid
$331M total · peak $39.8M in FY2026

Competitive grants
$8.5M total · peak $4.2M in FY2025

Earmark-account payments
$1.5M total · peak $489,000 in FY2025



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $21.9 million, are not shown.

EARMARKS

Arlington received $2.9 million in local earmarks naming the town, $3 million placed in the town and $3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.9M	**$3M**	**$3M**	**Not a member**
$63.02 per resident (105th of 351)	$64.10 per resident (132nd of 351)	$64.10 per resident (137th of 351)	35 municipalities had none

Placed in the town: 44 clauses in ten of ten budgets; the most recent in FY2026. $2.9 million came in clauses that name Arlington; the other $50,000 went to organizations based in Arlington, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$175,000	"the Arlington Youth Counseling Center in the town of Arlington"	Enacted names the town
FY2022	$175,000	"the Arlington Youth Counseling Center in the town of Arlington"	Enacted names the town
FY2021	$160,000	"the Arlington Youth Counseling Center"	Enacted names the town
FY2019	$160,000	"the Arlington Youth Counseling Center"	Enacted names the town
FY2023	$155,000	"the Arlington housing authority for fire alarm system upgrades to the Drake Village complex in the town of Arlington"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Arlington received about its proportional share of competitive grant awards.

Local road miles **103.0** 86th of 351 · 2.2 per 1,000 residents (333rd of 351)	Town-owned bridges, replacement cost **$4M** scored exposure $3.1M · two in poor condition	Road-stream crossings **28** 319th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **5.1 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **46,451** residents plus seasonal	Core infrastructure index **1.46** roads, culverts, dams, coast, flood, energy

Burden index 0.96; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$18,385** FY2017–2025 · 210th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.5% of Arlington's general-fund spending in FY2025, down from 17.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.0%** $17.1M of $101M · median town 14.1%	FY2016 **15.8%** $20.7M of $131M · median town 12.2%	FY2025 **13.5%** $29M of $214M · median town 11.5%	Net of state charges, FY2025 **11.7%** FY2010: 12.2% · median town 10.0%

Arlington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Arlington's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 9.3% above its FY2006 aid grown by Boston-area consumer prices and 2.9% below grown by the government price index.

Gross state aid went from $17.1 million in FY2006 to $29 million in FY2025, +69.4% in dollars. Flag: in FY2010, $2.5 million of Arlington's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+60.6%** $13.3M to $21.4M · all towns +54.0%	All fixed costs, FY2016–25 **+61.5%** $25.7M to $41.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Arlington's health insurance would have been $16.6 million in FY2025; it was $21.4 million, $4.76 million above the path. Its fixed costs would have been $32.1 million in FY2025; it was $41.5 million, $9.41 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Arlington came to $2.7 million, 33.5% of the $8.07 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.7M	33.5%	28.2%
Placed in the town	$2.7M	33.5%	42.3%
Everything placed	$2.7M	33.5%	45.2%

SCHOOLS

Arlington's required school contribution is 2.2% of median household income, 294th highest of 351.

Chapter 70 aid, FY2026 **$21.4M** to the town's district	Required local contribution **$65.2M** FY2026
Share of household income **2.2%** 294th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

Arlington runs its own school district and also belongs to Minuteman; Arlington accounts for 31% of that district's foundation budget.

EXPECTED AND ACTUAL

Arlington received $12.1 million in earmarks placed in the town and competitive grants over ten years, 89% of the $13.6 million its size, need and institutions predict.

PEERS

Arlington ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Arlington this town	**32**	**$7,131**	**$184**	**$64.10**	**0.96**	**2.2%**
Chelmsford peer	31	$7,630	$194	$41.84	0.37	3.1%
Billerica peer	39	$9,140	$64.58	$21.52	0.29	2.7%
Melrose peer	35	$7,621	$417	$63.68	2.22	2.7%
Danvers peer	30	$6,947	$129	$53.36	0.20	2.9%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Hanover lowest in class of 30	38	$9,140	$220	$18.83	0.60	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Ashburnham

Town · Worcester County · 6,415 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Worcester · Jonathan D. Zlotnik

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Ashburnham-Westminster Regional School District, shared with Westminster
Montachusett Regional Vocational Technical School District, vocational, shared with Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Ashburnham scores 54 on the Fairness Index for all state aid and 45 for discretionary money. Fifty is a fair share.

ALL STATE AID

54 / 100

90th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	59	49	51

Rank under other weightings: 66th to 103rd.

Weighting-dependent: the range crosses the 45–55 band

Ashburnham received more than its share of state aid on three of four measures; its blended score of 54 stays between 52 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

45 / 100

203rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	50	39	42

Rank under other weightings: 194th to 209th.

Weighting-dependent: the range crosses the 45–55 band

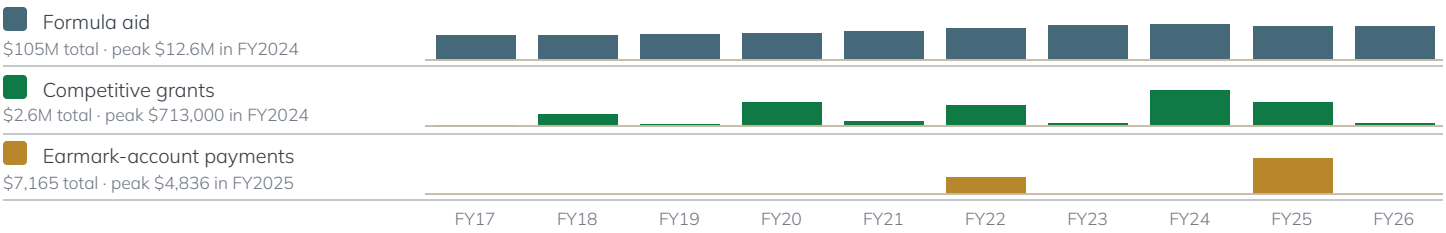
Ashburnham received less than its share of discretionary money on three of four measures; its blended score of 45 stays between 42 and 48 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ashburnham's town government and school districts received $105 million in formula aid and $2.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$105M	**$2.6M**	**$7,165**
$16,359 per resident (55th of 351) · gross	$402 per resident (168th of 351)	$1.12 per resident (326th of 351)

Competitive grants to Ashburnham peaked in FY2024 at $713,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.9 million, are not shown.

EARMARKS

Ashburnham received $170,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$170,000	**$170,000**	**$170,000**	**Not a member**
$26.50 per resident (245th of 351)	$26.50 per resident (256th of 351)	$26.50 per resident (257th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Ashburnham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$120,000	"the William J. Bresnahan Scouting and Community Center Inc. in the town of Ashburnham"	Enacted names the town
FY2025	$50,000	"the New Dawn Arts Center, Inc. in the town of Ashburnham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ashburnham received 70% of its proportional share of competitive grant awards.

Local road miles **74.0** 177th of 351 · 11.5 per 1,000 residents (90th of 351)	Town-owned bridges, replacement cost **$10M** scored exposure $4.7M · seven in poor condition	Road-stream crossings **93** 133rd of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **38.3 sq mi** 15% state-owned	Seasonal homes **14%** share of housing units	Peak service population **7,456** residents plus seasonal	Core infrastructure index **0.53** roads, culverts, dams, coast, flood, energy

Burden index 0.70; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,279 acres** 13.4% of land area · FY2026	State-owned land PILOT, FY2026 **$203,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$61.89** statewide $117 · FY2026	New growth per resident **$12,179** FY2017–2025 · 291st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.5% of Ashburnham's general-fund spending in FY2025, down from 6.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.7%** $781,000 of $11.7M · median town 14.1%	FY2016 **6.0%** $914,000 of $15.3M · median town 12.2%	FY2025 **6.5%** $1.3M of $20.1M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 6.1% · median town 10.0%

Ashburnham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ashburnham's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 7.8% above its FY2006 aid grown by Boston-area consumer prices and 4.2% below grown by the government price index.

Gross state aid went from $781,000 in FY2006 to $1.3 million in FY2025, +67.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+63.1%** $425,000 to $693,000 · all towns +54.0%	All fixed costs, FY2016–25 **+84.5%** $952,000 to $1.8M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ashburnham's health insurance would have been $531,000 in FY2025; it was $693,000, $162,000 above the path. Its fixed costs would have been $1.19 million in FY2025; it was $1.76 million, $567,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ashburnham came to $170,000, 63.4% of the $268,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$170,000	63.4%	28.2%
Placed in the town	$170,000	63.4%	42.3%
Everything placed	$170,000	63.4%	45.2%

SCHOOLS

Ashburnham's required school contribution is 2.5% of median household income, 236th highest of 351.

Chapter 70 aid, FY2026 **$8.7M** attributed to the town	Required local contribution **$6.9M** FY2026
Share of household income **2.5%** 236th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

Ashburnham has no school district of its own. Its pupils attend Ashburnham-Westminster and Montachusett; Ashburnham accounts for 44% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Ashburnham received $2.7 million in earmarks placed in the town and competitive grants over ten years, 61% of the $4.5 million its size, need and institutions predict.

PEERS

Ashburnham ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ashburnham this town	**54**	**$16,359**	**$402**	**$26.50**	**0.70**	**2.5%**
Hampden peer	31	$7,912	$119	$42.46	1.10	3.0%
Pepperell peer	51	$13,867	$271	$56.38	1.79	2.6%
Merrimac peer	47	$12,597	$215	$48.54	1.78	2.5%
Granby peer	49	$12,582	$104	$26.32	0.31	2.4%
West Boylston peer	35	$8,612	$157	$148	0.30	3.0%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Deerfield lowest in class of 30	44	$9,461	$1,195	$6.46	2.83	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Ashby

Town · Middlesex County · 3,211 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

North Middlesex Regional School District, shared with Pepperell and Townsend

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Athol, Barre, Fitchburg, Gardner, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Ashby scores 56 on the Fairness Index for all state aid and 48 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

71st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	62	51	55

Rank under other weightings: 61st to 84th.

Weighting-dependent: the range crosses the 45–55 band

Ashby received more than its share of state aid on all four measures; its blended score of 56 stays between 54 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

48 / 100

194th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	54	45	47

Rank under other weightings: 181st to 196th.

Near fair: between 45 and 55 under every weighting

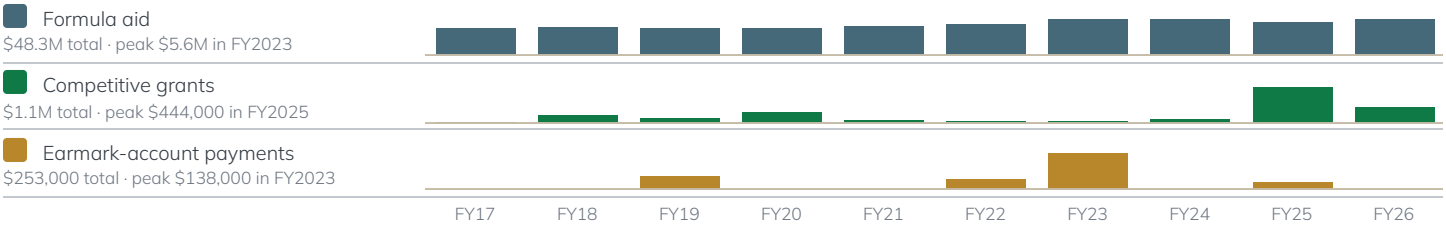
Ashby received less than its share of discretionary money on three of four measures; its blended score of 48 stays between 47 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ashby's town government and school districts received $48.3 million in formula aid and $1.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$48.3M	$1.1M	$253,000
$15,057 per resident (72nd of 351) · gross	$337 per resident (192nd of 351)	$78.74 per resident (34th of 351)

Competitive grants to Ashby peaked in FY2025 at $444,000, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.4 million, are not shown.

EARMARKS

Ashby received $200,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$200,000	$200,000	$200,000	Not a member
$62.29 per resident (111th of 351)	$62.29 per resident (137th of 351)	$62.29 per resident (143rd of 351)	35 municipalities had none

Placed in the town: six clauses in five of ten budgets; the most recent in FY2025. Every one names Ashby directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$50,000	"a feasibility study for a public safety building in the town of Ashby"	Enacted names the town
FY2018	$50,000	"costs related to the study, planning and engineering of a water line connection in the town of Ashby"	Enacted names the town
FY2022	$40,000	"the purchase of a utility task vehicle, or UTV, for the fire department in the town of Ashby"	Enacted names the town
FY2025	$25,000	"a police cruiser retrofit for the Ashby police department"	Enacted names the town
FY2024	$20,000	"the council on aging in the town of Ashby for infrastructure improvements and furniture procurement"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ashby received 63% of its proportional share of competitive grant awards.

Local road miles **51.4** 246th of 351 · 16.0 per 1,000 residents (69th of 351)	Town-owned bridges, replacement cost **$1.7M** scored exposure $303,000 · none in poor condition	Road-stream crossings **80** 166th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **23.7 sq mi** 16% state-owned	Seasonal homes **3%** share of housing units	Peak service population **3,313** residents plus seasonal	Core infrastructure index **1.31** roads, culverts, dams, coast, flood, energy

Burden index 0.63; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,103 acres** 13.9% of land area · FY2026	State-owned land PILOT, FY2026 **$194,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$92.04** statewide $117 · FY2026	New growth per resident **$8,874** FY2017–2025 · 332nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.5% of Ashby's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $431,000 of $4.7M · median town 14.1%	FY2016 **8.6%** $550,000 of $6.4M · median town 12.2%	FY2025 **7.5%** $776,000 of $10.3M · median town 11.5%	Net of state charges, FY2025 **7.2%** FY2010: 9.0% · median town 10.0%

Ashby's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ashby's state aid kept pace with both price measures: FY2025 aid was 16.1% above its FY2006 aid grown by Boston-area consumer prices and 3.2% above grown by the government price index.

Gross state aid went from $431,000 in FY2006 to $776,000 in FY2025, +80.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+23.4%** $372,000 to $459,000 · all towns +54.0%	All fixed costs, FY2016–25 **+38.0%** $654,000 to $902,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ashby's health insurance would have been $465,000 in FY2025; it was $459,000, $5,662 below the path. Its fixed costs would have been $817,000 in FY2025; it was $902,000, $86,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ashby came to $200,000, 2.3 times the $87,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$200,000	2.3 times	28.2%
Placed in the town	$200,000	2.3 times	42.3%
Everything placed	$200,000	2.3 times	45.2%

SCHOOLS

Ashby's required school contribution is 2.3% of median household income, 280th highest of 351.

Chapter 70 aid, FY2026 **$3.2M** attributed to the town	Required local contribution **$3.3M** FY2026
Share of household income **2.3%** 280th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

Ashby has no school district of its own. Its pupils attend North Middlesex and Montachusett; Ashby accounts for 13% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Ashby received $1.3 million in earmarks placed in the town and competitive grants over ten years, 50% of the $2.6 million its size, need and institutions predict.

PEERS

Ashby ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ashby this town	**56**	**$15,057**	**$337**	**$62.29**	**0.63**	**2.3%**
Hubbardston peer	59	$16,583	$264	$66.58	0.33	2.3%
Avon peer	46	$10,665	$1,049	$101	3.02	3.0%
Paxton peer	40	$9,789	$93.21	$32.99	0.11	2.5%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Shutesbury lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Ashfield

Town · Franklin County · 1,893 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Franklin · Natalie M. Blais	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Mohawk Trail Regional School District**, shared with Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield and Shelburne	Franklin Regional Council Of Governments

FAIRNESS INDEX

Ashfield scores 45 on the Fairness Index for all state aid and 87 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

163rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	42	49	41

Rank under other weightings: 143rd to 192nd.

Weighting-dependent: the range crosses the 45–55 band

Ashfield received less than its share of state aid on all four measures; its blended score of 45 stays between 43 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

87 / 100

49th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
91	89	80	88

Rank under other weightings: 46th to 53rd.

Stable high: above 55 under every weighting

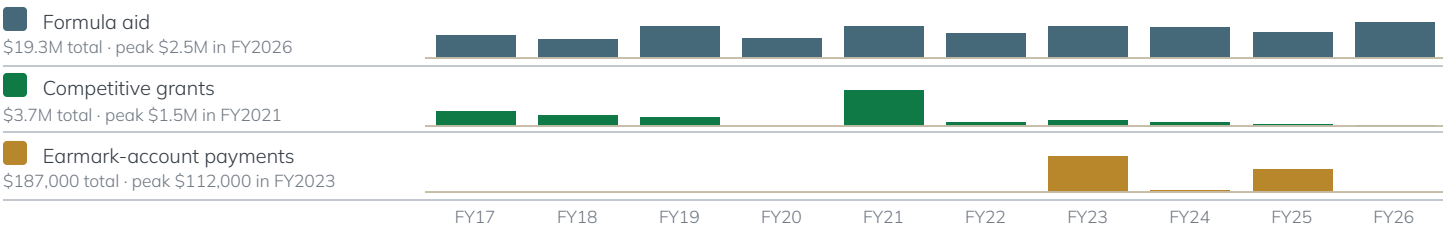
Ashfield received more than its share of discretionary money on all four measures; its blended score of 87 stays between 85 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ashfield's town government and school districts received $19.3 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$19.3M	**$3.7M**	**$187,000**
$10,211 per resident (172nd of 351) · gross	$1,970 per resident (46th of 351)	$98.73 per resident (24th of 351)

Competitive grants to Ashfield peaked in FY2021 at $1.5 million, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.9 million, are not shown.

EARMARKS

Ashfield received $62,000 in local earmarks naming the town, $92,000 placed in the town and $92,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$62,000	**$92,000**	**$92,000**	**Not a member**
$33.02 per resident (214th of 351)	$48.86 per resident (177th of 351)	$48.86 per resident (180th of 351)	35 municipalities had none

Placed in the town: four clauses in three of ten budgets; the most recent in FY2024. $62,000 came in clauses that name Ashfield; the other $30,000 went to organizations based in Ashfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$50,000	"Double Edge theatre in the town of Ashfield"	Enacted names the town
FY2021	$15,000	"the Recovery Theater within the Hilltown Youth Theatre Performing Arts Programs"	Enacted recipient based here
FY2020	$15,000	"the Recovery Theater within the Hilltown Youth Theatre Performing Arts Programs"	Enacted recipient based here
FY2020	$12,000 (split two ways)	"The Senior Center Consortium representing the towns of Ashfield, Buckland, and Shelburne and the western Franklin County region for the design and…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ashfield received 1.85 times its proportional share of competitive grant awards.

Local road miles **71.6** 184th of 351 · 37.8 per 1,000 residents (35th of 351)	Town-owned bridges, replacement cost **$13.5M** scored exposure $4.7M · six in poor condition	Road-stream crossings **116** 83rd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **40.0 sq mi** 2% state-owned	Seasonal homes **7%** share of housing units	Peak service population **2,038** residents plus seasonal	Core infrastructure index **2.65** roads, culverts, dams, coast, flood, energy

Burden index 1.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **631 acres** 2.5% of land area · FY2026	State-owned land PILOT, FY2026 **$22,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$34.80** statewide $117 · FY2026	New growth per resident **$31,569** FY2017–2025 · 98th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.3% of Ashfield's general-fund spending in FY2025, down from 7.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.6%** $251,000 of $3.3M · median town 14.1%	FY2016 **7.0%** $293,000 of $4.2M · median town 12.2%	FY2025 **6.3%** $364,000 of $5.8M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 7.2% · median town 10.0%

Ashfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $893,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ashfield's state aid did not keep pace with either price measure: FY2025 aid was 6.7% below its FY2006 aid grown by Boston-area consumer prices and 17.1% below grown by the government price index.

Gross state aid went from $251,000 in FY2006 to $364,000 in FY2025, +44.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+148.3%** $45,000 to $111,000 · all towns +54.0%	All fixed costs, FY2016–25 **+109.2%** $175,000 to $367,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ashfield's health insurance would have been $56,000 in FY2025; it was $111,000, $55,000 above the path. Its fixed costs would have been $219,000 in FY2025; it was $367,000, $148,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (+41%) and FY2024 (+38%); health insurance changed by more than 30% in one year in FY2021 (+44%) and FY2025 (+49%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ashfield came to $62,000, 94.3% of the $66,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$62,000	94.3%	28.2%
Placed in the town	$92,000	139.6%	42.3%
Everything placed	$92,000	139.6%	45.2%

SCHOOLS

Ashfield's required school contribution is 2.4% of median household income, 256th highest of 351.

Chapter 70 aid, FY2026 **$951,000** attributed to the town	Required local contribution **$1.8M** FY2026
Share of household income **2.4%** 256th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Ashfield has no school district of its own. Its pupils attend Ashfield and Mohawk Trail; Ashfield accounts for 100% and 18% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Ashfield received $4.9 million in earmarks placed in the town and competitive grants over ten years, 85% of the $5.8 million its size, need and institutions predict.

PEERS

Ashfield ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ashfield this town	**45**	**$10,211**	**$1,970**	**$48.86**	**1.85**	**2.4%**
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%
Pelham peer	47	$13,701	$594	$11.86	2.69	2.5%
Petersham peer · lowest in class of 30	56	$19,509	$612	$0	0.99	2.7%
Lanesborough peer	40	$10,886	$484	$0	1.16	2.8%
Shelburne peer	66	$14,126	$8,461	$182	2.94	3.0%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Ashland

Town · Middlesex County · 18,873 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Middlesex · Jack Patrick Lewis

STATE SENATE

Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS

Ashland Public Schools, the town's own district

South Middlesex Regional Vocational Technical School District, vocational, shared with Framingham, Holliston, Hopkinton and Natick

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Ashland scores 36 on the Fairness Index for all state aid and 80 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

251st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	46	30	34

Rank under other weightings: 244th to 263rd.

Stable low: below 45 under every weighting

Ashland received less than its share of state aid on all four measures; its blended score of 36 stays between 33 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

80 / 100

75th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	85	82	77

Rank under other weightings: 62nd to 82nd.

Stable high: above 55 under every weighting

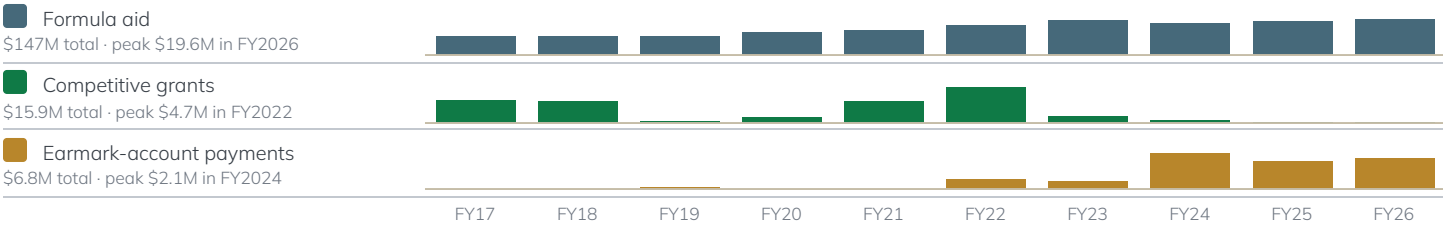
Ashland received more than its share of discretionary money on all four measures; its blended score of 80 stays between 78 and 82 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ashland's town government and school districts received $147 million in formula aid and $15.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$147M	**$15.9M**	**$6.8M**
$7,807 per resident (264th of 351) · gross	$843 per resident (90th of 351)	$358 per resident (4th of 351)

Competitive grants to Ashland peaked in FY2022 at $4.7 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.1 million, are not shown.

EARMARKS

Ashland received $1.7 million in local earmarks naming the town, $1.9 million placed in the town and $1.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.7M	**$1.9M**	**$1.9M**	**Not a member**
$87.75 per resident (62nd of 351)	$98.35 per resident (72nd of 351)	$98.35 per resident (82nd of 351)	35 municipalities had none

Placed in the town: 29 clauses in ten of ten budgets; the most recent in FY2026. $1.7 million came in clauses that name Ashland; the other $200,000 went to organizations based in Ashland, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000	"the renovation and improvement of the Ashland Community Center"	Enacted names the town
FY2025	$125,000	"the Ashland arboretum at the former Cadilac Paint site"	Enacted names the town
FY2024	$125,000	"trail and other multi-modal path management, including design, engineering, technical assistance, consulting services and land acquisitions in the…"	Enacted names the town
FY2026	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address…"	Enacted names the town
FY2025	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ashland received 1.10 times its proportional share of competitive grant awards.

Local road miles **78.3** 162nd of 351 · 4.2 per 1,000 residents (274th of 351)	Town-owned bridges, replacement cost **$16.6M** scored exposure $5.8M · two in poor condition	Road-stream crossings **92** 136th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **12.3 sq mi** 12% state-owned	Seasonal homes **1%** share of housing units	Peak service population **19,005** residents plus seasonal	Core infrastructure index **0.80** roads, culverts, dams, coast, flood, energy

Burden index 1.10; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **692 acres** 8.8% of land area · FY2026	State-owned land PILOT, FY2026 **$184,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$266** statewide $117 · FY2026	New growth per resident **$20,524** FY2017–2025 · 176th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.9% of Ashland's general-fund spending in FY2025, up from 13.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.1%** $5.4M of $41M · median town 14.1%	FY2016 **14.2%** $7.3M of $51.5M · median town 12.2%	FY2025 **17.9%** $13.8M of $77.3M · median town 11.5%	Net of state charges, FY2025 **17.3%** FY2010: 11.2% · median town 10.0%

Ashland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $422,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ashland's state aid kept pace with both price measures: FY2025 aid was 66.3% above its FY2006 aid grown by Boston-area consumer prices and 47.8% above grown by the government price index.

Gross state aid went from $5.4 million in FY2006 to $13.8 million in FY2025, +157.9% in dollars. Flag: in FY2010, $636,000 of Ashland's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+41.3%** $5.4M to $7.6M · all towns +54.0%	All fixed costs, FY2016–25 **+54.2%** $8.4M to $12.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ashland's health insurance would have been $6.73 million in FY2025; it was $7.62 million, $887,000 above the path. Its fixed costs would have been $10.5 million in FY2025; it was $12.9 million, $2.46 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ashland came to $1.4 million, 63.5% of the $2.23 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	63.5%	28.2%
Placed in the town	$1.6M	72.4%	42.3%
Everything placed	$1.6M	72.4%	45.2%

SCHOOLS

Ashland's required school contribution is 3.0% of median household income, 69th highest of 351.

Chapter 70 aid, FY2026 **$12.4M** to the town's district	Required local contribution **$29.6M** FY2026
Share of household income **3.0%** 69th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+37%** after inflation

Ashland runs its own school district and also belongs to South Middlesex; Ashland accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Ashland received $17.9 million in earmarks placed in the town and competitive grants over ten years, 3.6 times the $4.9 million its size, need and institutions predict.

PEERS

Ashland ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ashland this town	**36**	**$7,807**	**$843**	**$98.35**	**1.10**	**3.0%**
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Wilmington peer	42	$9,651	$202	$31.68	0.32	2.7%
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Athol

Town · Worcester County · 12,011 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Athol-Royalston Regional School District, shared with Royalston
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Barre, Fitchburg, Gardner, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Athol scores 68 on the Fairness Index for all state aid and 74 for discretionary money. Fifty is a fair share.

ALL STATE AID

68 / 100

14th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	61	68	72

Rank under other weightings: 13th to 18th.

Stable high: above 55 under every weighting

Athol received more than its share of state aid on all four measures; its blended score of 69 stays between 66 and 71 under every weighting tested.

DISCRETIONARY MONEY ONLY

74 / 100

89th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	66	78	76

Rank under other weightings: 86th to 101st.

Stable high: above 55 under every weighting

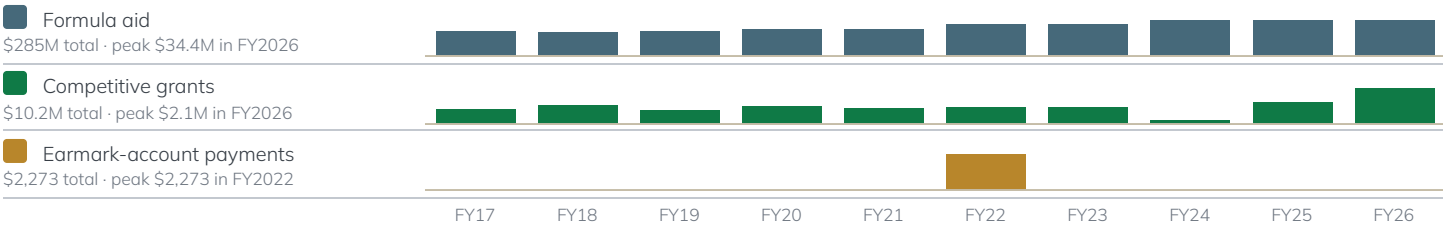
Athol received more than its share of discretionary money on all four measures; its blended score of 74 stays between 72 and 76 under every weighting tested.

STATE MONEY, FY2017–FY2026

Athol's town government and school districts received $285 million in formula aid and $10.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$285M	$10.2M	$2,273
$23,699 per resident (13th of 351) · gross	$853 per resident (87th of 351)	$0.19 per resident (336th of 351)

Competitive grants to Athol peaked in FY2026 at $2.1 million, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.5 million, are not shown.

EARMARKS

Athol received $655,000 in local earmarks naming the town, $1.4 million placed in the town and $1.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$655,000	$1.4M	$1.4M	Not a member
$54.53 per resident (134th of 351)	$117 per resident (49th of 351)	$117 per resident (53rd of 351)	35 municipalities had none

Placed in the town: 21 clauses in ten of ten budgets; the most recent in FY2026. $655,000 came in clauses that name Athol; the other $750,000 went to organizations based in Athol, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$400,000	"the Montachusett regional transit authority for the so-called "Athol-Orange shuttle", the Community Transit Services successor service, to maintain..."	Enacted names the town
FY2018	$125,000 (split two ways)	"the Montachusett Regional Transit Authority for the Athol-Orange shuttle, the community transit services successor service, to maintain current..."	Enacted names the town
FY2018	$75,000	"the North Quabbin Chamber of Commerce, Inc. to fund maker space and workforce development"	Enacted recipient based here
FY2025	$50,000	"the North Quabbin Community Coalition, Inc"	Enacted recipient based here
FY2025	$50,000	"the North Quabbin Chamber of Commerce, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Athol received 1.25 times its proportional share of competitive grant awards.

Local road miles **99.6** 95th of 351 · 8.3 per 1,000 residents (132nd of 351)	Town-owned bridges, replacement cost **$24.3M** scored exposure $4.9M · one in poor condition	Road-stream crossings **110** 98th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **32.3 sq mi** 14% state-owned	Seasonal homes **1%** share of housing units	Peak service population **12,175** residents plus seasonal	Core infrastructure index **1.04** roads, culverts, dams, coast, flood, energy

Burden index 1.25; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,526 acres** 12.2% of land area · FY2026	State-owned land PILOT, FY2026 **$113,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$44.64** statewide $117 · FY2026	New growth per resident **$10,669** FY2017–2025 · 310th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.1% of Athol's general-fund spending in FY2025, down from 20.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.1%** $2.5M of $12.3M · median town 14.1%	FY2016 **15.1%** $2.7M of $17.9M · median town 12.2%	FY2025 **14.1%** $3.6M of $25.4M · median town 11.5%	Net of state charges, FY2025 **13.5%** FY2010: 17.3% · median town 10.0%

Athol's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $25.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Athol's state aid did not keep pace with either price measure: FY2025 aid was 6.7% below its FY2006 aid grown by Boston-area consumer prices and 17.1% below grown by the government price index.

Gross state aid went from $2.5 million in FY2006 to $3.6 million in FY2025, +44.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–3.6%** $2.1M to $2M · all towns +54.0%	All fixed costs, FY2016–25 **+22.6%** $4.1M to $5.1M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Athol's health insurance would have been $2.60 million in FY2025; it was $2.00 million, $593,000 below the path. Its fixed costs would have been $5.17 million in FY2025; it was $5.07 million, $93,000 below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Athol's reported health insurance fell from $2.1 million in FY2016 to $2 million in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$655,000	no increase	28.2%
Placed in the town	$1.3M	no increase	42.3%
Everything placed	$1.3M	no increase	45.2%

SCHOOLS

Athol's required school contribution is 1.4% of median household income, 340th highest of 351.

Chapter 70 aid, FY2026 **$26.2M** attributed to the town	Required local contribution **$4.6M** FY2026
Share of household income **1.4%** 340th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Athol has no school district of its own. Its pupils attend Athol-Royalston and Montachusett; Athol accounts for 94% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Athol received $14.9 million in earmarks placed in the town and competitive grants over ten years, 87% of the $17.2 million its size, need and institutions predict.

PEERS

Athol ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Athol this town	**68**	**$23,699**	**$853**	**$117**	**1.25**	**1.4%**
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Adams peer	64	$19,320	$1,327	$27.87	2.22	2.2%
Southbridge peer	68	$21,891	$992	$33.72	1.54	2.3%
Orange peer	66	$23,109	$1,214	$123	2.59	3.0%
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Attleboro

City · Bristol County · 46,762 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Bristol · James K. Hawkins 92% of residents
14th Bristol · Adam J. Scanlon 8% of residents

Attleboro is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Attleboro Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Attleboro scores 48 on the Fairness Index for all state aid and 14 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

139th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	44	48	51

Rank under other weightings: 122nd to 152nd.

Near fair: between 45 and 55 under every weighting

Attleboro received less than its share of state aid on three of four measures; its blended score of 48 stays between 47 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

14 / 100

335th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
14	11	16	15

Rank under other weightings: 329th to 340th.

Stable low: below 45 under every weighting

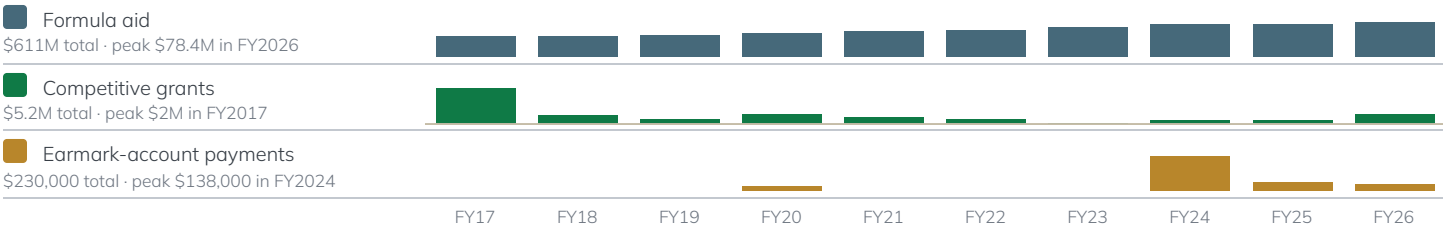
Attleboro received less than its share of discretionary money on all four measures; its blended score of 14 stays between 13 and 15 under every weighting tested.

STATE MONEY, FY2017–FY2026

Attleboro's town government and school districts received $611 million in formula aid and $5.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$611M	**$5.2M**	**$230,000**
$13,064 per resident (111th of 351) · gross	$110 per resident (318th of 351)	$4.92 per resident (286th of 351)

Competitive grants to Attleboro peaked in FY2017 at $2 million, 39% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $32.7 million, are not shown.

EARMARKS

Attleboro received $1.2 million in local earmarks naming the town, $1.5 million placed in the town and $1.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$1.5M**	**$1.5M**	**Not a member**
$25.03 per resident (248th of 351)	$32.30 per resident (229th of 351)	$32.30 per resident (230th of 351)	35 municipalities had none

Placed in the town: 37 clauses in ten of ten budgets; the most recent in FY2026. $1.2 million came in clauses that name Attleboro; the other $340,000 went to organizations based in Attleboro, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$140,000	"Manet Community Health Center, Incorporated for construction costs associated with the completion of phase 2 expansion of its Attleboro satellite..."	Enacted names the town
FY2023	$125,000	"a feasibility study for a new council on aging facility in the city of Attleboro"	Enacted names the town
FY2026	$100,000	"Sturdy Memorial Hospital, Inc. for the expansion of its emergency department to create new capacity for emergency behavioral health services"	Enacted recipient based here
FY2026	$100,000	"Illuminate Creative and Theatrical Arts Company, Inc. for capital improvements and operations relative to the revitalization of the Union Theatre in..."	Enacted names the town
FY2022	$83,000	"New Hope, Inc. In the city of Attleboro for development of a domestic violence shelter and services to support survivors of domestic violence"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Attleboro received 33% of its proportional share of competitive grant awards.

Local road miles **197.0** 16th of 351 · 4.2 per 1,000 residents (272nd of 351)	Town-owned bridges, replacement cost **$24M** scored exposure $5.3M · one in poor condition	Road-stream crossings **143** 51st of 351 · culverts and small crossings	Town-owned hazard dams **8** high or significant hazard
Land area **26.8 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **47,076** residents plus seasonal	Core infrastructure index **0.40** roads, culverts, dams, coast, flood, energy

Burden index 0.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$14,157** FY2017–2025 · 266th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 34.4% of Attleboro's general-fund spending in FY2025, down from 35.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **35.5%** $37.9M of $107M · median town 14.1%	FY2016 **34.6%** $42.7M of $123M · median town 12.2%	FY2025 **34.4%** $64.1M of $187M · median town 11.5%	Net of state charges, FY2025 **31.5%** FY2010: 35.3% · median town 10.0%

Attleboro's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $240,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Attleboro's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 9.2% above its FY2006 aid grown by Boston-area consumer prices and 3.0% below grown by the government price index.

Gross state aid went from $37.9 million in FY2006 to $64.1 million in FY2025, +69.3% in dollars. Flag: in FY2010, $4.4 million of Attleboro's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.0%** $22.9M to $32.6M · all towns +54.0%	All fixed costs, FY2016–25 **+45.7%** $23.5M to $34.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Attleboro's health insurance would have been $28.6 million in FY2025; it was $32.6 million, $3.92 million above the path. Its fixed costs would have been $29.4 million in FY2025; it was $34.3 million, $4.90 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Attleboro came to $988,000, 10.3% of the $9.63 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$988,000	10.3%	28.2%
Placed in the town	$1.2M	12.1%	42.3%
Everything placed	$1.2M	12.1%	45.2%

SCHOOLS

Attleboro's required school contribution is 2.7% of median household income, 149th highest of 351.

Chapter 70 aid, FY2026 **$62.1M** to the town's district	Required local contribution **$48.5M** FY2026
Share of household income **2.7%** 149th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Attleboro runs its own school district and also belongs to Bristol County; Attleboro accounts for 4% of that district's foundation budget.

EXPECTED AND ACTUAL

Attleboro received $7 million in earmarks placed in the town and competitive grants over ten years, 42% of the $16.9 million its size, need and institutions predict.

PEERS

Attleboro ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Attleboro this town	**48**	**$13,064**	**$110**	**$32.30**	**0.33**	**2.7%**
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Leominster peer	58	$16,497	$382	$54.84	1.58	2.5%
Revere peer	64	$19,109	$328	$31.01	2.70	2.8%
Westfield peer	52	$14,111	$235	$64.11	0.63	2.6%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Auburn

Town · Worcester County · 16,970 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
7th Worcester · Paul K. Frost

STATE SENATE
Second Worcester · Michael O. Moore

SCHOOL DISTRICTS
Auburn Public Schools, the town's own district
Southern Worcester County Regional Vocational School District, vocational, shared with Charlton, Dudley, North Brookfield, Oxford, Paxton, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Auburn scores 43 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

179th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	46	39	42

Rank under other weightings: 174th to 199th.

Stable low: below 45 under every weighting

Auburn received less than its share of state aid on all four measures; its blended score of 43 stays between 42 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

310th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	23	18	20

Rank under other weightings: 306th to 315th.

Stable low: below 45 under every weighting

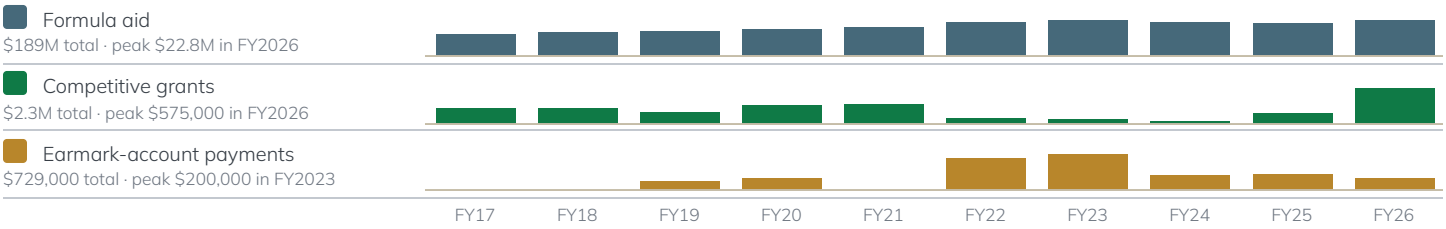
Auburn received less than its share of discretionary money on all four measures; its blended score of 20 stays between 20 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Auburn's town government and school districts received $189 million in formula aid and $2.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$189M	$2.3M	$729,000
$11,124 per resident (143rd of 351) · gross	$134 per resident (302nd of 351)	$42.96 per resident (100th of 351)

Competitive grants to Auburn peaked in FY2026 at $575,000, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16.6 million, are not shown.

EARMARKS

Auburn received $780,000 in local earmarks naming the town, $805,000 placed in the town and $805,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$780,000	$805,000	$805,000	Not a member
$45.99 per resident (158th of 351)	$47.46 per resident (179th of 351)	$47.46 per resident (182nd of 351)	35 municipalities had none

Placed in the town: 23 clauses in nine of ten budgets; the most recent in FY2026. $780,000 came in clauses that name Auburn; the other $25,000 went to organizations based in Auburn, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$65,000	"the town of Auburn for public safety communication equipment and programming of dispatch radio consoles"	Enacted names the town
FY2024	$50,000	"turnout gear for the Auburn fire department"	Enacted names the town
FY2023	$50,000	"improvements to the Robert Goddard rocket and fountain in the town of Auburn"	Enacted names the town
FY2023	$50,000	"improvements to Auburn pond in Goddard park in the town of Auburn"	Enacted names the town
FY2023	$50,000	"the new pedestrian bridge linking Goddard park to the public library in the town of Auburn"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Auburn received 32% of its proportional share of competitive grant awards.

Local road miles **97.2** 103rd of 351 · 5.7 per 1,000 residents (204th of 351)	Town-owned bridges, replacement cost **$18.9M** scored exposure $12.3M · four in poor condition	Road-stream crossings **150** 39th of 351 · culverts and small crossings	Town-owned hazard dams **7** high or significant hazard
Land area **15.5 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **16,970** residents plus seasonal	Core infrastructure index **0.99** roads, culverts, dams, coast, flood, energy

Burden index 0.32; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$20,146** FY2017–2025 · 178th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 22.2% of Auburn's general-fund spending in FY2025, up from 14.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.6%** $5.9M of $40.3M · median town 14.1%	FY2016 **19.0%** $10.5M of $55.1M · median town 12.2%	FY2025 **22.2%** $18.2M of $81.7M · median town 11.5%	Net of state charges, FY2025 **21.5%** FY2010: 15.3% · median town 10.0%

Auburn's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Auburn's state aid kept pace with both price measures: FY2025 aid was 98.6% above its FY2006 aid grown by Boston-area consumer prices and 76.5% above grown by the government price index.

Gross state aid went from $5.9 million in FY2006 to $18.2 million in FY2025, +208.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+91.1%** $7.4M to $14M · all towns +54.0%	All fixed costs, FY2016–25 **+95.1%** $8.7M to $17M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Auburn's health insurance would have been $9.18 million in FY2025; it was $14 million, $4.87 million above the path. Its fixed costs would have been $10.9 million in FY2025; it was $17 million, $6.13 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2019 (+38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Auburn came to $715,000, 10.7% of the $6.70 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$715,000	10.7%	28.2%
Placed in the town	$740,000	11.1%	42.3%
Everything placed	$740,000	11.1%	45.2%

SCHOOLS

Auburn's required school contribution is 2.6% of median household income, 207th highest of 351.

Chapter 70 aid, FY2026 **$17M** to the town's district	Required local contribution **$20.3M** FY2026
Share of household income **2.6%** 207th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Auburn runs its own school district and also belongs to Southern Worcester; Auburn accounts for 11% of that district's foundation budget.

EXPECTED AND ACTUAL

Auburn received $3.1 million in earmarks placed in the town and competitive grants over ten years, 48% of the $6.4 million its size, need and institutions predict.

PEERS

Auburn ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Auburn this town	**43**	**$11,124**	**$134**	**$47.46**	**0.32**	**2.6%**
East Longmeadow peer	42	$11,619	$224	$13.70	0.72	3.2%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Bridgewater peer	39	$9,702	$309	$21.78	1.08	3.0%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
North Attleborough peer	44	$10,543	$156	$39.34	1.28	2.7%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Avon

Town · Norfolk County · 4,774 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Norfolk · William C. Galvin

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

Avon Public Schools, the town's own district

Blue Hills Regional Vocational Technical School District, vocational, shared with Braintree, Canton, Dedham, Holbrook, Milton, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Avon scores 46 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

154th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	54	44	40

Rank under other weightings: 142nd to 167th.

Weighting-dependent: the range crosses the 45–55 band

Avon received less than its share of state aid on three of four measures; its blended score of 46 stays between 44 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

71st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
82	86	77	79

Rank under other weightings: 62nd to 79th.

Stable high: above 55 under every weighting

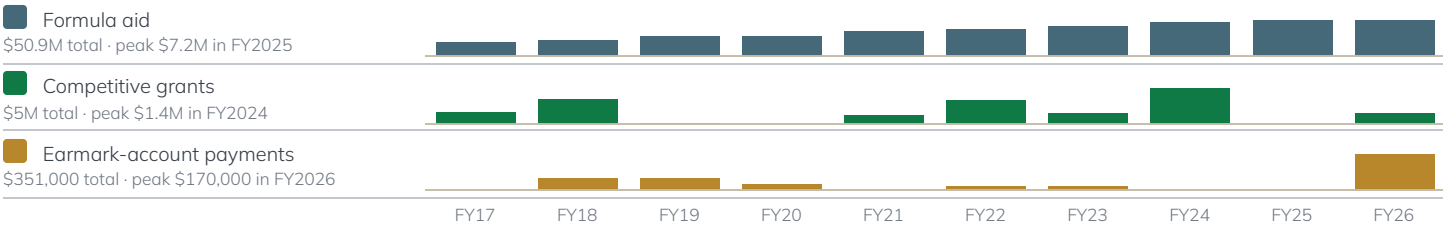
Avon received more than its share of discretionary money on all four measures; its blended score of 81 stays between 79 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Avon's town government and school districts received $50.9 million in formula aid and $5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$50.9M	**$5M**	**$351,000**
$10,665 per resident (158th of 351) · gross	$1,049 per resident (75th of 351)	$73.46 per resident (38th of 351)

Competitive grants to Avon peaked in FY2024 at $1.4 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.9 million, are not shown.

EARMARKS

Avon received $480,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$480,000	**$480,000**	**$480,000**	**Not a member**
$101 per resident (50th of 351)	$101 per resident (68th of 351)	$101 per resident (77th of 351)	35 municipalities had none

Placed in the town: ten clauses in nine of ten budgets; the most recent in FY2026. Every one names Avon directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"polyfluoroalkyl substances remediation costs in the town of Avon"	Enacted names the town
FY2017	$100,000	"an economic development grant to the town of Avon"	Enacted names the town
FY2025	$75,000	"complete a sprinkler system for the elementary school in the town of Avon"	Enacted names the town
FY2018	$75,000 (split three ways)	"in equal amounts for substance abuse coalitions and community partnerships in the municipalities of Avon, Braintree, Canton, East Bridgewater…"	Enacted names the town
FY2018	$30,000	"the town of Avon for infrastructure improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Avon received 3.02 times its proportional share of competitive grant awards.

Local road miles **23.9** 332nd of 351 · 5.0 per 1,000 residents (232nd of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,774** residents plus seasonal	Core infrastructure index **7.98** roads, culverts, dams, coast, flood, energy

Burden index 3.02; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$21,514** FY2017–2025 · 168th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.6% of Avon's general-fund spending in FY2025, up from 14.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.4%** $2.2M of $15.4M · median town 14.1%	FY2016 **12.6%** $2.7M of $21.4M · median town 12.2%	FY2025 **17.6%** $6.2M of $34.9M · median town 11.5%	Net of state charges, FY2025 **16.3%** FY2010: 13.2% · median town 10.0%

Avon's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $431,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Avon's state aid kept pace with both price measures: FY2025 aid was 78.9% above its FY2006 aid grown by Boston-area consumer prices and 59.0% above grown by the government price index.

Gross state aid went from $2.2 million in FY2006 to $6.2 million in FY2025, +177.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.5%** $2.4M to $3.4M · all towns +54.0%	All fixed costs, FY2016–25 **+60.6%** $3.7M to $6M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Avon's health insurance would have been $2.99 million in FY2025; it was $3.42 million, $423,000 above the path. Its fixed costs would have been $4.64 million in FY2025; it was $5.97 million, $1.33 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Avon came to $455,000, 44.6% of the $1.02 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$455,000	44.6%	28.2%
Placed in the town	$455,000	44.6%	42.3%
Everything placed	$455,000	44.6%	45.2%

SCHOOLS

Avon's required school contribution is 3.0% of median household income, 85th highest of 351.

Chapter 70 aid, FY2026 **$4.9M** to the town's district	Required local contribution **$6.7M** FY2026
Share of household income **3.0%** 85th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+107%** after inflation

Avon runs its own school district and also belongs to Blue Hills and Norfolk County; Avon accounts for 6% and 0% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Avon received $5.5 million in earmarks placed in the town and competitive grants over ten years, 24% more than the $4.4 million its size, need and institutions predict.

PEERS

Avon ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Avon this town	**46**	**$10,665**	**$1,049**	**$101**	**3.02**	**3.0%**
Hubbardston peer	59	$16,583	$264	$66.58	0.33	2.3%
Ashby peer	56	$15,057	$337	$62.29	0.63	2.3%
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Berkley lowest in class of 30	51	$12,903	$95.35	$13.91	0.18	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Ayer

Town · Middlesex County · 8,645 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

37th Middlesex · Danillo A. Sena

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Ayer Shirley School District, shared with Shirley

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Chelmsford, Groton, Littleton, Pepperell, Shirley, Townsend and Westford

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Ayer scores 45 on the Fairness Index for all state aid and 80 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

160th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	40	44	53

Rank under other weightings: 136th to 194th.

Weighting-dependent: the range crosses the 45–55 band

Ayer received less than its share of state aid on three of four measures; its blended score of 45 stays between 43 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

80 / 100

76th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
80	78	76	85

Rank under other weightings: 70th to 80th.

Stable high: above 55 under every weighting

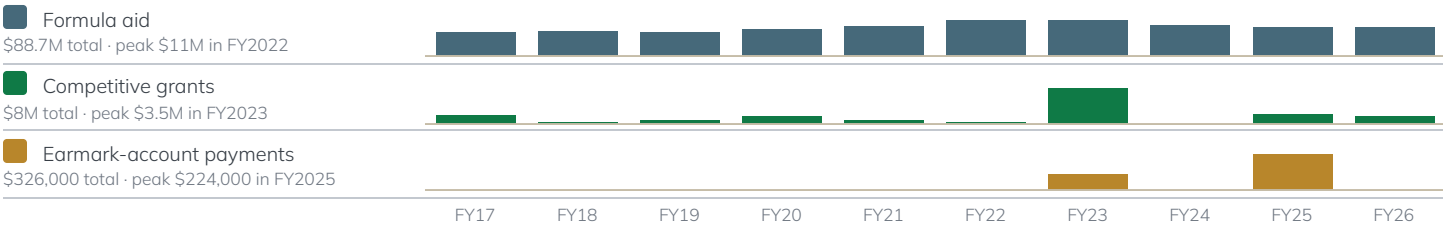
Ayer received more than its share of discretionary money on all four measures; its blended score of 80 stays between 78 and 82 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ayer's town government and school districts received $88.7 million in formula aid and $8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$88.7M	**$8M**	**$326,000**
$10,265 per resident (170th of 351) · gross	$930 per resident (81st of 351)	$37.71 per resident (120th of 351)

Competitive grants to Ayer peaked in FY2023 at $3.5 million, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.8 million, are not shown.

EARMARKS

Ayer received $1.1 million in local earmarks naming the town, $970,000 placed in the town and $1.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$970,000**	**$1.1M**	**Not a member**
$130 per resident (24th of 351)	$112 per resident (57th of 351)	$130 per resident (46th of 351)	35 municipalities had none

Placed in the town: ten clauses in eight of ten budgets; the most recent in FY2026. Every one names Ayer directly.

Names the town includes $150,000 in clauses that name Ayer but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $150,000 in one clause for state facilities located in Ayer (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$250,000	"the Montachusett Regional Transit Authority for further improvements to the Depot square portion of the Ayer rail trail commuter parking project"	Enacted names the town
FY2021	$150,000	"Clear Path for Veterans New England, Inc. in Devens for building renovations to an outreach and wellness service center due to increased client need..."	Enacted names the town
FY2019	$120,000	"Loaves and Fishes Food Pantry, Inc., in Devens"	Enacted names the town
FY2023	$100,000	"the town of Ayer to remediate the Kiddie Junction playground located at Pirone park"	Enacted names the town
FY2017	$100,000	"the Fort Devens Museum to support staffing and educational programs"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ayer received 1.63 times its proportional share of competitive grant awards.

Local road miles **40.6** 291st of 351 · 4.7 per 1,000 residents (249th of 351)	Town-owned bridges, replacement cost **$7.4M** scored exposure $4.1M · three in poor condition	Road-stream crossings **49** 266th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **8.9 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,645** residents plus seasonal	Core infrastructure index **2.28** roads, culverts, dams, coast, flood, energy

Burden index 1.63; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **110 acres** 1.9% of land area · FY2026	State-owned land PILOT, FY2026 **$26,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$238** statewide $117 · FY2026	New growth per resident **$35,546** FY2017–2025 · 79th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

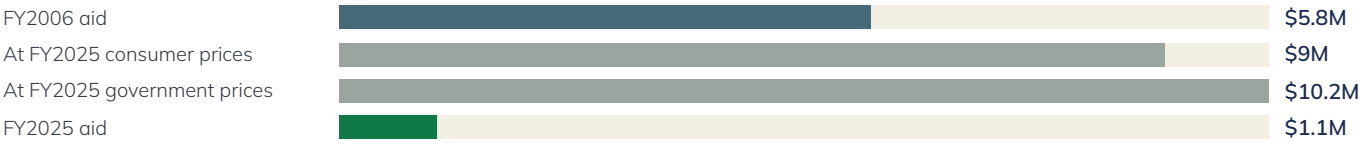
State aid covered 3.4% of Ayer's general-fund spending in FY2025, down from 30.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **30.1%** $5.8M of $19.4M · median town 14.1%	FY2016 **3.7%** $873,000 of $23.8M · median town 12.2%	FY2025 **3.4%** $1.1M of $31.5M · median town 11.5%	Net of state charges, FY2025 **3.0%** FY2010: 23.2% · median town 10.0%

Ayer's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $4.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ayer's state aid did not keep pace with either price measure: FY2025 aid was 88.2% below its FY2006 aid grown by Boston-area consumer prices and 89.5% below grown by the government price index.



Gross state aid went from $5.8 million in FY2006 to $1.1 million in FY2025, −81.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.0%** $1.3M to $1.6M · all towns +54.0%	All fixed costs, FY2016–25 **+54.3%** $2.8M to $4.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ayer's health insurance would have been $1.62 million in FY2025; it was $1.59 million, $37,000 below the path. Its fixed costs would have been $3.49 million in FY2025; it was $4.31 million, $821,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2023 (+42%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ayer came to $1.1 million, 3.7 times the $287,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	3.7 times	28.2%
Placed in the town	$920,000	3.2 times	42.3%
Everything placed	$1.1M	3.7 times	45.2%

SCHOOLS

Ayer's required school contribution is 3.1% of median household income, 54th highest of 351.

Chapter 70 aid, FY2026 **$5.1M** attributed to the town	Required local contribution **$11.4M** FY2026
Share of household income **3.1%** 54th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–20%** after inflation

Ayer has no school district of its own. Its pupils attend Ayer Shirley and Nashoba Valley; Ayer accounts for 59% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Ayer received $9.3 million in earmarks placed in the town and competitive grants over ten years, 44% more than the $6.4 million its size, need and institutions predict.

PEERS

Ayer ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ayer this town	**45**	**$10,265**	**$930**	**$112**	**1.63**	**3.1%**
Fairhaven peer	47	$10,747	$508	$12.58	0.36	2.8%
Carver peer	50	$13,650	$330	$7.68	0.83	3.0%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%
Easthampton peer	41	$9,515	$1,083	$51.82	3.73	2.9%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Barnstable

City · Barnstable County · 49,568 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Barnstable · Kip A. Diggs 78% of residents
5th Barnstable · Steven George Xiarhos 22% of residents

Barnstable is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Barnstable Public Schools, the city's own district
Cape Cod Regional Vocational Technical School District, vocational, shared with Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Barnstable scores 26 on the Fairness Index for all state aid and 35 for discretionary money. Fifty is a fair share.

ALL STATE AID

26 / 100

340th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	28	29	23

Rank under other weightings: 327th to 343rd.

Stable low: below 45 under every weighting

Barnstable received less than its share of state aid on all four measures; its blended score of 27 stays between 25 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

35 / 100

245th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	40	30	34

Rank under other weightings: 237th to 253rd.

Stable low: below 45 under every weighting

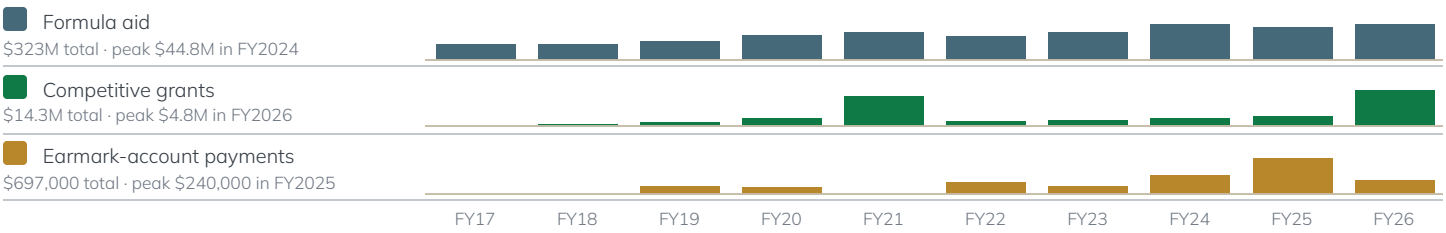
Barnstable received less than its share of discretionary money on all four measures; its blended score of 35 stays between 33 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Barnstable's town government and school districts received $323 million in formula aid and $14.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$323M	**$14.3M**	**$697,000**
$6,526 per resident (314th of 351) · gross	$289 per resident (214th of 351)	$14.05 per resident (234th of 351)

Competitive grants to Barnstable peaked in FY2026 at $4.8 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $90.6 million, are not shown.

EARMARKS

Barnstable received $1.1 million in local earmarks naming the town, $3.4 million placed in the town and $3.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$3.4M**	**$3.5M**	**Not a member**
$22.38 per resident (259th of 351)	$69.38 per resident (115th of 351)	$71.52 per resident (119th of 351)	35 municipalities had none

Placed in the town: 56 clauses in ten of ten budgets; the most recent in FY2026. $1 million came in clauses that name Barnstable; the other $2.4 million went to organizations based in Barnstable, some of which serve a wider area.

Names the town includes $106,000 in clauses that name Barnstable but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $106,000 in two clauses for state facilities located in Barnstable (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$200,000	"the Cape Cod commission for a collaboration with Barnstable county on a needs assessment related to early education on Cape Cod and the Islands"	Enacted recipient based here
FY2026	$150,000	"the city known as the town of Barnstable to support the development and operation of a municipal housing resource initiative to improve housing..."	Enacted names the town
FY2026	$100,000	"the city known as the town of Barnstable for the downtown Hyannis pedestrian improvements projects including the great streets project and the..."	Enacted names the town
FY2026	$100,000	"the Housing Assistance Corporation for the development of housing and project feasibility studies to expedite the creation of more year-round..."	Enacted recipient based here
FY2025	$100,000	"the city known as the town of Barnstable for hiring staff for the city's diversity, equity, and inclusion initiatives"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Barnstable received 74% of its proportional share of competitive grant awards.

Local road miles **354.0** 4th of 351 · 7.1 per 1,000 residents (154th of 351)	Town-owned bridges, replacement cost **$19.2M** scored exposure $11.1M · one in poor condition	Road-stream crossings **119** 79th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **59.9 sq mi** 1% state-owned	Seasonal homes **19%** share of housing units	Peak service population **61,856** residents plus seasonal	Core infrastructure index **0.58** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **417 acres** 1.1% of land area · FY2026	State-owned land PILOT, FY2026 **$211,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$505** statewide $117 · FY2026	New growth per resident **$30,330** FY2017–2025 · 105th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 16.0% of Barnstable's general-fund spending in FY2025, up from 12.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.4%** $13.4M of $109M · median town 14.1%	FY2016 **11.2%** $15.5M of $138M · median town 12.2%	FY2025 **16.0%** $31.3M of $196M · median town 11.5%	Net of state charges, FY2025 **8.0%** FY2010: 7.3% · median town 10.0%

Barnstable's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Barnstable's state aid kept pace with both price measures: FY2025 aid was 50.4% above its FY2006 aid grown by Boston-area consumer prices and 33.7% above grown by the government price index.

Gross state aid went from $13.4 million in FY2006 to $31.3 million in FY2025, +133.3% in dollars. Flag: in FY2010, $3.5 million of Barnstable's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.9%** $7.1M to $10.4M · all towns +54.0%	All fixed costs, FY2016–25 **+47.9%** $19.6M to $29.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Barnstable's health insurance would have been $8.91 million in FY2025; it was $10.4 million, $1.50 million above the path. Its fixed costs would have been $24.5 million in FY2025; it was $29.1 million, $4.52 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Barnstable came to $699,000, 21.3% of the $3.28 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$699,000	21.3%	28.2%
Placed in the town	$2.8M	85.4%	42.3%
Everything placed	$2.9M	88.6%	45.2%

SCHOOLS

Barnstable's required school contribution is 3.6% of median household income, 14th highest of 351.

Chapter 70 aid, FY2026 **$27.3M** to the town's district	Required local contribution **$71.7M** FY2026
Share of household income **3.6%** 14th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+101%** after inflation

Barnstable runs its own school district and also belongs to Cape Cod; Barnstable accounts for 28% of that district's foundation budget.

EXPECTED AND ACTUAL

Barnstable received $20.2 million in earmarks placed in the town and competitive grants over ten years, 68% of the $29.8 million its size, need and institutions predict.

PEERS

Barnstable ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Barnstable this town	**26**	**$6,526**	**$289**	**$69.38**	**0.74**	**3.6%**
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Dartmouth peer	29	$6,506	$296	$157	0.73	3.6%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Barre

Town · Worcester County · 5,572 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE
Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS
Quabbin Regional School District, shared with Hardwick, Hubbardston, New Braintree and Oakham
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Fitchburg, Gardner, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Barre scores 63 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

63 / 100

31st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	60	59	66

Rank under other weightings: 28th to 35th.

Stable high: above 55 under every weighting

Barre received more than its share of state aid on all four measures; its blended score of 63 stays between 61 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

298th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	21	24	26

Rank under other weightings: 283rd to 305th.

Stable low: below 45 under every weighting

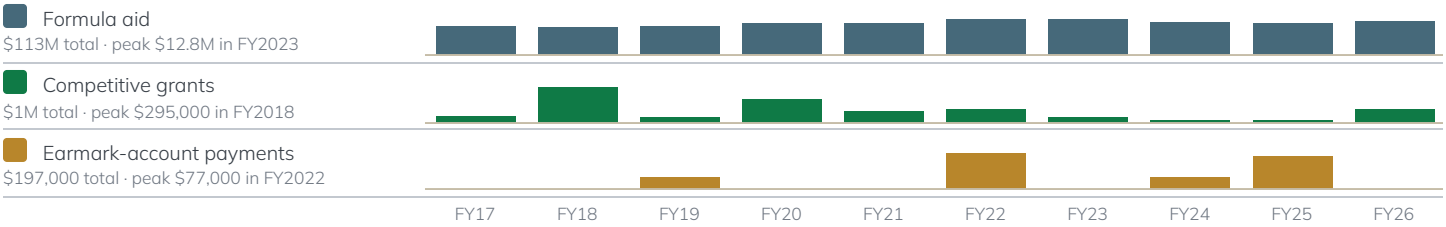
Barre received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

Barre's town government and school districts received $113 million in formula aid and $1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$113M	$1M	$197,000
$20,237 per resident (25th of 351) · gross	$183 per resident (263rd of 351)	$35.41 per resident (126th of 351)

Competitive grants to Barre peaked in FY2018 at $295,000, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.4 million, are not shown.

EARMARKS

Barre received $125,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$125,000	$125,000	$125,000	Not a member
$22.43 per resident (258th of 351)	$22.43 per resident (267th of 351)	$22.43 per resident (268th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Barre directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$70,000	"the purchase of a new pickup truck for the fire department in the town of Barre"	Enacted names the town
FY2024	$30,000	"the 250th anniversary celebration in the town of Barre"	Enacted names the town
FY2019	$25,000	"the town of Barre for the Barre fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Barre received 33% of its proportional share of competitive grant awards.

Local road miles **97.7** 100th of 351 · 17.5 per 1,000 residents (64th of 351)	Town-owned bridges, replacement cost **$16.5M** scored exposure $7.1M · three in poor condition	Road-stream crossings **106** 107th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **44.3 sq mi** 29% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,572** residents plus seasonal	Core infrastructure index **0.63** roads, culverts, dams, coast, flood, energy

Burden index 0.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,674 acres** 9.4% of land area · FY2026	State-owned land PILOT, FY2026 **$131,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$49.15** statewide $117 · FY2026	New growth per resident **$10,094** FY2017–2025 · 322nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.1% of Barre's general-fund spending in FY2025, down from 11.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.6%** $899,000 of $7.8M · median town 14.1%	FY2016 **10.0%** $1M of $10.1M · median town 12.2%	FY2025 **9.1%** $1.3M of $14.4M · median town 11.5%	Net of state charges, FY2025 **9.0%** FY2010: 10.6% · median town 10.0%

Barre's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Barre's state aid did not keep pace with either price measure: FY2025 aid was 5.5% below its FY2006 aid grown by Boston-area consumer prices and 16.0% below grown by the government price index.

Gross state aid went from $899,000 in FY2006 to $1.3 million in FY2025, +46.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+2.2%** $436,000 to $446,000 · all towns +54.0%	All fixed costs, FY2016–25 **+59.7%** $805,000 to $1.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Barre's health insurance would have been $545,000 in FY2025; it was $446,000, $99,000 below the path. Its fixed costs would have been $1.01 million in FY2025; it was $1.29 million, $280,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Barre came to $125,000, 13.1 times the $9,512 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$125,000	13.1 times	28.2%
Placed in the town	$125,000	13.1 times	42.3%
Everything placed	$125,000	13.1 times	45.2%

SCHOOLS

Barre's required school contribution is 2.1% of median household income, 299th highest of 351.

Chapter 70 aid, FY2026 **$8.2M** attributed to the town	Required local contribution **$4.6M** FY2026
Share of household income **2.1%** 299th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Barre has no school district of its own. Its pupils attend Quabbin and Montachusett; Barre accounts for 38% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Barre received $1.2 million in earmarks placed in the town and competitive grants over ten years, 21% of the $5.6 million its size, need and institutions predict.

PEERS

Barre ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Barre this town	**63**	**$20,237**	**$183**	**$22.43**	**0.33**	**2.1%**
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Dalton peer	58	$17,590	$490	$27.97	1.32	2.7%
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Bernardston lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Becket

Town · Berkshire County · 1,962 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Berkshire · Leigh Davis

The author was a candidate for this seat in 2024.

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Central Berkshire Regional School District, shared with Cummington, Dalton, Hinsdale, Peru, Washington and Windsor

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Becket scores 50 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

120th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	49	46	57

Rank under other weightings: 104th to 137th.

Near fair: between 45 and 55 under every weighting

Becket received less than its share of state aid on two of four measures; its blended score of 51 stays between 49 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

18th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	96	92	97

Rank under other weightings: 15th to 19th.

Stable high: above 55 under every weighting

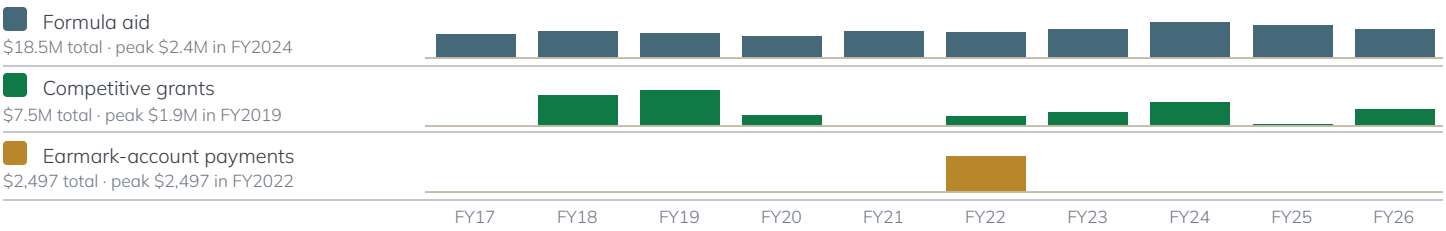
Becket received more than its share of discretionary money on all four measures; its blended score of 96 stays between 95 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Becket's town government and school districts received $18.5 million in formula aid and $7.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$18.5M	**$7.5M**	**$2,497**
$9,450 per resident (197th of 351) · gross	$3,826 per resident (23rd of 351)	$1.27 per resident (322nd of 351)

Competitive grants to Becket peaked in FY2019 at $1.9 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.3 million, are not shown.

EARMARKS

No local earmark was placed in Becket in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,497 in payments to Becket's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Becket.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Becket's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Hatfield	$10,000	$10,000	$10,000	$3.01
Leverett	$215,000	$215,000	$215,000	$134
Sheffield	$0	$0	$0	$0
Lee	$125,000	$125,000	$125,000	$21.86
Hancock	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Becket received 2.09 times its proportional share of competitive grant awards.

Local road miles **56.4** 224th of 351 · 28.7 per 1,000 residents (42nd of 351)	Town-owned bridges, replacement cost **$10.7M** scored exposure $3.1M · five in poor condition	Road-stream crossings **144** 49th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **46.1 sq mi** 15% state-owned	Seasonal homes **46%** share of housing units	Peak service population **3,814** residents plus seasonal	Core infrastructure index **1.24** roads, culverts, dams, coast, flood, energy

Burden index 2.09; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,329 acres** 14.7% of land area · FY2026	State-owned land PILOT, FY2026 **$81,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$18.66** statewide $117 · FY2026	New growth per resident **$19,792** FY2017–2025 · 189th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.3% of Becket's general-fund spending in FY2025, down from 4.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.1%** $172,000 of $4.2M · median town 14.1%	FY2016 **4.5%** $241,000 of $5.3M · median town 12.2%	FY2025 **3.3%** $295,000 of $9M · median town 11.5%	Net of state charges, FY2025 **3.2%** FY2010: 4.1% · median town 10.0%

Becket's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $560,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Becket's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 10.7% above its FY2006 aid grown by Boston-area consumer prices and 1.6% below grown by the government price index.

Gross state aid went from $172,000 in FY2006 to $295,000 in FY2025, +71.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.4%** $358,000 to $510,000 · all towns +54.0%	All fixed costs, FY2016–25 **+45.3%** $691,000 to $1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Becket's health insurance would have been $447,000 in FY2025; it was $510,000, $63,000 above the path. Its fixed costs would have been $863,000 in FY2025; it was $1.00 million, $141,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Becket came to $0, 0.0% of the $152,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Becket's required school contribution is 3.5% of median household income, 17th highest of 351.

Chapter 70 aid, FY2026 **$644,000** attributed to the town	Required local contribution **$2.5M** FY2026
Share of household income **3.5%** 17th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–41%** after inflation

Becket has no school district of its own. Its pupils attend Becket and Central Berkshire; Becket accounts for 100% and 12% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Becket received $7.8 million in earmarks placed in the town and competitive grants over ten years, 37% more than the $5.7 million its size, need and institutions predict.

PEERS

Becket is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Becket this town	**50**	**$9,450**	**$3,826**	**$0**	**2.09**	**3.5%**
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Lee peer	38	$7,783	$1,292	$21.86	2.91	3.1%
Hancock peer	43	$9,560	$360	$0	0.91	2.9%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Bedford

Town · Middlesex County · 14,727 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

21st Middlesex · Kenneth I. Gordon

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Bedford Public Schools, the town's own district

Shawsheen Valley Regional Vocational Technical School District, vocational, shared with Billerica, Burlington, Tewksbury and Wilmington

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Bedford scores 42 on the Fairness Index for all state aid and 41 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

194th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	56	31	42

Rank under other weightings: 161st to 226th.

Weighting-dependent: the range crosses the 45–55 band

Bedford received less than its share of state aid on three of four measures; its blended score of 42 stays between 38 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

41 / 100

217th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	56	26	42

Rank under other weightings: 201st to 236th.

Weighting-dependent: the range crosses the 45–55 band

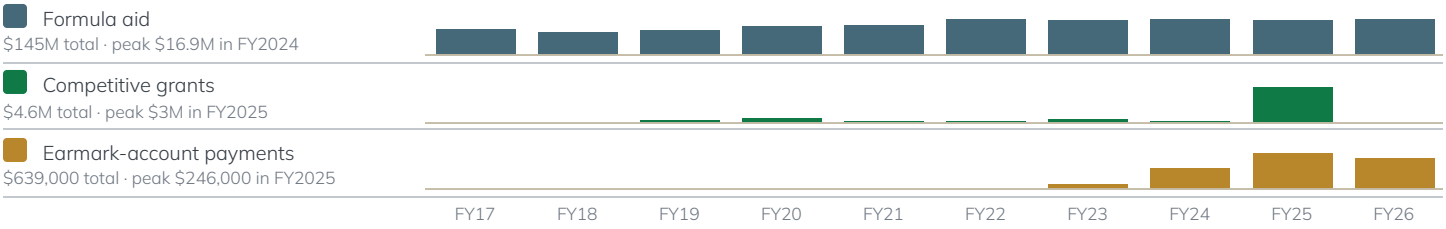
Bedford received less than its share of discretionary money on three of four measures; its blended score of 41 stays between 36 and 46 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bedford's town government and school districts received $145 million in formula aid and $4.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$145M	**$4.6M**	**$639,000**
$9,879 per resident (183rd of 351) · gross	$313 per resident (202nd of 351)	$43.39 per resident (99th of 351)

Competitive grants to Bedford peaked in FY2025 at $3 million, 66% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.4 million, are not shown.

EARMARKS

Bedford received $250,000 in local earmarks naming the town, $270,000 placed in the town and $270,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$250,000	**$270,000**	**$270,000**	**Not a member**
$16.98 per resident (276th of 351)	$18.33 per resident (279th of 351)	$18.33 per resident (279th of 351)	35 municipalities had none

Placed in the town: seven clauses in four of ten budgets; the most recent in FY2026. $250,000 came in clauses that name Bedford; the other $20,000 went to organizations based in Bedford, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"accessible playground equipment in the town of Bedford"	Enacted names the town
FY2025	$75,000	"a performance platform to be used for cultural events in the town of Bedford"	Enacted names the town
FY2026	$25,000 (split two ways)	"youth programs at Dennison memorial community center in city of New Bedford; provider further, that not less than $200,000 shall be expended for a…"	Enacted names the town
FY2024	$25,000 (split two ways)	"polyfluoroalkyl substances remediation in the towns of Burlington and Bedford"	Enacted names the town
FY2022	$25,000	"the town of Bedford for the Elm Brook Footbridge Replacement"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Bedford received about its proportional share of competitive grant awards.

Local road miles **72.9** 180th of 351 · 5.0 per 1,000 residents (235th of 351)	Town-owned bridges, replacement cost **$10.4M** scored exposure $3.6M · two in poor condition	Road-stream crossings **53** 249th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **13.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **14,766** residents plus seasonal	Core infrastructure index **0.64** roads, culverts, dams, coast, flood, energy

Burden index 0.99; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **683 acres** 7.8% of land area · FY2026	State-owned land PILOT, FY2026 **$1.7M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,460** statewide $117 · FY2026	New growth per resident **$46,863** FY2017–2025 · 40th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.2% of Bedford's general-fund spending in FY2025, down from 9.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.7%** $5.6M of $58M · median town 14.1%	FY2016 **8.5%** $6.8M of $79.4M · median town 12.2%	FY2025 **8.2%** $9.6M of $117M · median town 11.5%	Net of state charges, FY2025 **7.8%** FY2010: 9.2% · median town 10.0%

Bedford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $187,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bedford's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 9.6% above its FY2006 aid grown by Boston-area consumer prices and 2.6% below grown by the government price index.

Gross state aid went from $5.6 million in FY2006 to $9.6 million in FY2025, +70.0% in dollars. Flag: in FY2010, $1.8 million of Bedford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+70.3%** $5.7M to $9.7M · all towns +54.0%	All fixed costs, FY2016–25 **+67.4%** $10.1M to $16.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bedford's health insurance would have been $7.11 million in FY2025; it was $9.70 million, $2.59 million above the path. Its fixed costs would have been $12.6 million in FY2025; it was $16.9 million, $4.28 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bedford came to $225,000, 5.6% of the $4.00 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$225,000	5.6%	28.2%
Placed in the town	$245,000	6.1%	42.3%
Everything placed	$245,000	6.1%	45.2%

SCHOOLS

Bedford's required school contribution is 2.9% of median household income, 91st highest of 351.

Chapter 70 aid, FY2026 **$6.9M** to the town's district	Required local contribution **$29.8M** FY2026
Share of household income **2.9%** 91st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

Bedford runs its own school district and also belongs to Shawsheen Valley; Bedford accounts for 4% of that district's foundation budget.

EXPECTED AND ACTUAL

Bedford received $4.9 million in earmarks placed in the town and competitive grants over ten years, 58% of the $8.4 million its size, need and institutions predict.

PEERS

Bedford ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bedford this town	**42**	**$9,879**	**$313**	**$18.33**	**0.99**	**2.9%**
Ipswich peer	28	$6,449	$237	$49.75	0.55	2.3%
Lynnfield peer	30	$7,167	$206	$147	0.81	3.0%
Duxbury peer	34	$8,178	$182	$32.03	1.56	2.7%
Canton peer	29	$6,511	$84.68	$52.89	0.29	2.9%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Belchertown

Town · Hampshire County · 15,393 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Hampden · Aaron L. Saunders

STATE SENATE

Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS

Belchertown Public Schools, the town's own district

Pathfinder Regional Vocational Technical School District, vocational, shared with Granby, Hardwick, Monson, New Braintree, Oakham, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Belchertown scores 49 on the Fairness Index for all state aid and 48 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

132nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	47	49	47

Rank under other weightings: 116th to 143rd.

Near fair: between 45 and 55 under every weighting

Belchertown received less than its share of state aid on three of four measures; its blended score of 49 stays between 48 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

48 / 100

193rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	44	58	44

Rank under other weightings: 183rd to 203rd.

Near fair: between 45 and 55 under every weighting

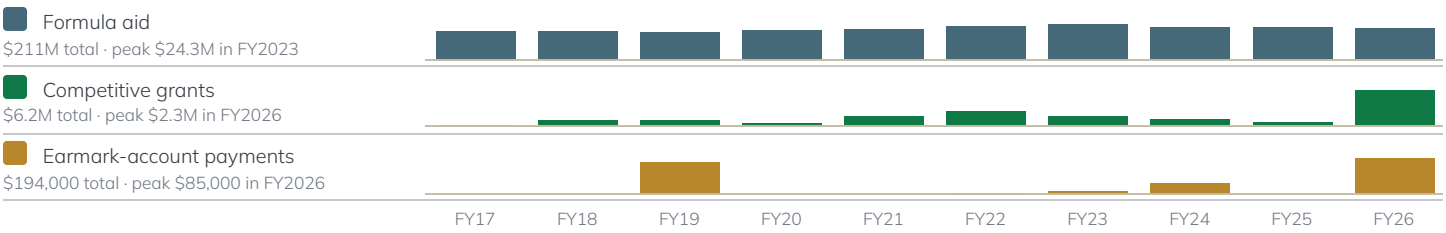
Belchertown received less than its share of discretionary money on three of four measures; its blended score of 48 stays between 46 and 51 under every weighting tested.

STATE MONEY, FY2017–FY2026

Belchertown's town government and school districts received $211 million in formula aid and $6.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$211M	**$6.2M**	**$194,000**
$13,722 per resident (100th of 351) · gross	$401 per resident (169th of 351)	$12.57 per resident (242nd of 351)

Competitive grants to Belchertown peaked in FY2026 at $2.3 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.2 million, are not shown.

EARMARKS

Belchertown received $235,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$235,000	**$235,000**	**$235,000**	**Not a member**
$15.27 per resident (282nd of 351)	$15.27 per resident (290th of 351)	$15.27 per resident (291st of 351)	35 municipalities had none

Placed in the town: five clauses in three of ten budgets; the most recent in FY2026. Every one names Belchertown directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$75,000	"the construction of a splash park in the town of Belchertown"	Enacted names the town
FY2026	$60,000	"the Belchertown fire department for the purchase and operation of a utility terrain vehicle"	Enacted names the town
FY2025	$50,000	"Belchertown for a feasibility study to ascertain estimated costs for building upgrades and potential uses of the municipally owned Franklin school…"	Enacted names the town
FY2026	$25,000	"the Belchertown Little League, Inc. for field renovations"	Enacted names the town
FY2026	$25,000	"the town of Belchertown for the Mass central rail trail"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Belchertown received 2.92 times its proportional share of competitive grant awards.

Local road miles **133.2** 45th of 351 · 8.7 per 1,000 residents (124th of 351)	Town-owned bridges, replacement cost **$14.4M** scored exposure $3.3M · one in poor condition	Road-stream crossings **210** 8th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **52.6 sq mi** 13% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,393** residents plus seasonal	Core infrastructure index **4.98** roads, culverts, dams, coast, flood, energy

Burden index 2.92; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,661 acres** 4.9% of land area · FY2026	State-owned land PILOT, FY2026 **$269,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$162** statewide $117 · FY2026	New growth per resident **$14,546** FY2017–2025 · 260th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 31.9% of Belchertown's general-fund spending in FY2025, down from 41.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **41.3%** $14.1M of $34.2M · median town 14.1%	FY2016 **39.4%** $17.9M of $45.4M · median town 12.2%	FY2025 **31.9%** $18.3M of $57.3M · median town 11.5%	Net of state charges, FY2025 **28.7%** FY2010: 40.8% · median town 10.0%

Belchertown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Belchertown's state aid did not keep pace with either price measure: FY2025 aid was 16.7% below its FY2006 aid grown by Boston-area consumer prices and 26.0% below grown by the government price index.

Gross state aid went from $14.1 million in FY2006 to $18.3 million in FY2025, +29.2% in dollars. Flag: in FY2010, $2.1 million of Belchertown's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+28.8%** $4M to $5.2M · all towns +54.0%	All fixed costs, FY2016–25 **+51.1%** $7.2M to $10.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Belchertown's health insurance would have been $5.02 million in FY2025; it was $5.18 million, $157,000 above the path. Its fixed costs would have been $9.05 million in FY2025; it was $10.9 million, $1.90 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Belchertown came to $125,000, 10.8% of the $1.16 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$125,000	10.8%	28.2%
Placed in the town	$125,000	10.8%	42.3%
Everything placed	$125,000	10.8%	45.2%

SCHOOLS

Belchertown's required school contribution is 2.5% of median household income, 237th highest of 351.

Chapter 70 aid, FY2026 **$15.9M** to the town's district	Required local contribution **$16.4M** FY2026
Share of household income **2.5%** 237th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Belchertown runs its own school district and also belongs to Pathfinder; Belchertown accounts for 17% of that district's foundation budget.

EXPECTED AND ACTUAL

Belchertown received $6.6 million in earmarks placed in the town and competitive grants over ten years, 93% of the $7.1 million its size, need and institutions predict.

PEERS

Belchertown ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Belchertown this town	**49**	**$13,722**	**$401**	**$15.27**	**2.92**	**2.5%**
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Ludlow peer	42	$10,596	$407	$132	1.85	2.8%
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Bellingham

Town · Norfolk County · 17,410 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Worcester · Michael J. Soter

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Bellingham Public Schools, the town's own district

Blackstone Valley Regional Vocational Technical School District, vocational, shared with Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Bellingham scores 39 on the Fairness Index for all state aid and 64 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

226th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	43	37	38

Rank under other weightings: 215th to 237th.

Stable low: below 45 under every weighting

Bellingham received less than its share of state aid on all four measures; its blended score of 39 stays between 38 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

64 / 100

129th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	66	65	62

Rank under other weightings: 124th to 132nd.

Stable high: above 55 under every weighting

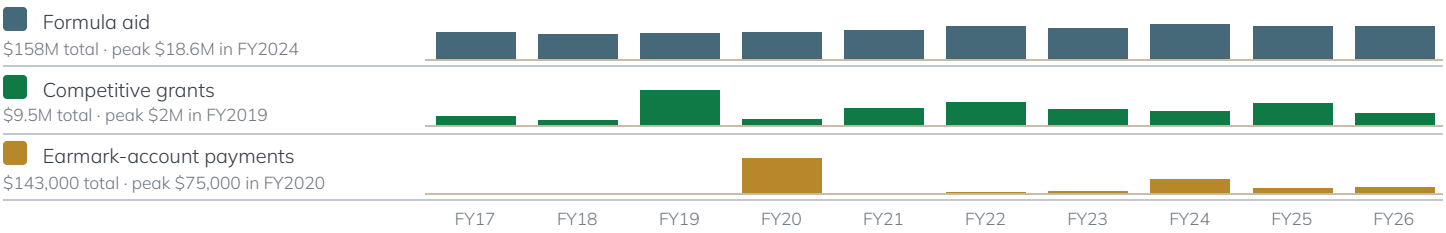
Bellingham received more than its share of discretionary money on all four measures; its blended score of 64 stays between 62 and 65 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bellingham's town government and school districts received $158 million in formula aid and $9.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$158M	**$9.5M**	**$143,000**
$9,082 per resident (217th of 351) · gross	$546 per resident (131st of 351)	$8.21 per resident (268th of 351)

Competitive grants to Bellingham peaked in FY2019 at $2 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9 million, are not shown.

EARMARKS

Bellingham received $430,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$430,000	**$430,000**	**$430,000**	**Not a member**
$24.67 per resident (250th of 351)	$24.67 per resident (260th of 351)	$24.67 per resident (261st of 351)	35 municipalities had none

Placed in the town: 16 clauses in ten of ten budgets; the most recent in FY2026. Every one names Bellingham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$65,000	"senior center parking lot improvements in the town of Bellingham"	Enacted names the town
FY2024	$50,000	"the replacement of playground equipment in the town common in the town of Bellingham"	Enacted names the town
FY2020	$50,000	"the purchase of new turnout gear for the Bellingham fire department in the town of Bellingham"	Enacted names the town
FY2025	$35,000	"handicap accessibility improvements at Silver Lake park in the town of Bellingham"	Enacted names the town
FY2022	$35,000	"the town of Bellingham for updates to the Bellingham senior center's kitchen facilities and to make the senior center the emergency management…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Bellingham received 1.24 times its proportional share of competitive grant awards.

Local road miles **92.6** 115th of 351 · 5.3 per 1,000 residents (217th of 351)	Town-owned bridges, replacement cost **$13.7M** scored exposure $3.6M · one in poor condition	Road-stream crossings **78** 172nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **18.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,410** residents plus seasonal	Core infrastructure index **0.38** roads, culverts, dams, coast, flood, energy

Burden index 1.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **10 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$1,638** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$160** statewide $117 · FY2026	New growth per resident **$35,086** FY2017–2025 · 81st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.9% of Bellingham's general-fund spending in FY2025, down from 27.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.5%** $12.1M of $43.9M · median town 14.1%	FY2016 **21.0%** $12.6M of $60.1M · median town 12.2%	FY2025 **15.9%** $13.3M of $83.9M · median town 11.5%	Net of state charges, FY2025 **10.5%** FY2010: 24.7% · median town 10.0%

Bellingham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $570,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bellingham's state aid did not keep pace with either price measure: FY2025 aid was 28.8% below its FY2006 aid grown by Boston-area consumer prices and 36.8% below grown by the government price index.

Gross state aid went from $12.1 million in FY2006 to $13.3 million in FY2025, +10.4% in dollars. Flag: in FY2010, $2.5 million of Bellingham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+36.0%** $10.7M to $14.5M · all towns +54.0%	All fixed costs, FY2016–25 **+25.2%** $13.4M to $16.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bellingham's health insurance would have been $13.3 million in FY2025; it was $14.5 million, $1.19 million above the path. Its fixed costs would have been $16.8 million in FY2025; it was $16.8 million, $37,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bellingham came to $350,000, 9.1% of the $3.85 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$350,000	9.1%	28.2%
Placed in the town	$350,000	9.1%	42.3%
Everything placed	$350,000	9.1%	45.2%

SCHOOLS

Bellingham's required school contribution is 3.0% of median household income, 88th highest of 351.

Chapter 70 aid, FY2026 **$11.1M** to the town's district	Required local contribution **$23.5M** FY2026
Share of household income **3.0%** 88th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Bellingham runs its own school district and also belongs to Norfolk County and Blackstone Valley; Bellingham accounts for 7% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Bellingham received $9.9 million in earmarks placed in the town and competitive grants over ten years, 88% more than the $5.3 million its size, need and institutions predict.

PEERS

Bellingham ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bellingham this town	**39**	**$9,082**	**$546**	**$24.67**	**1.24**	**3.0%**
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Belmont

Town · Middlesex County · 27,175 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
24th Middlesex · David M. Rogers

STATE SENATE
Suffolk and Middlesex · William N. Brownsberger

SCHOOL DISTRICTS
Belmont Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Belmont scores 32 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

290th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	52	23	24

Rank under other weightings: 261st to 320th.

Stable low: below 45 under every weighting

Belmont received less than its share of state aid on three of four measures; its blended score of 32 stays between 27 and 37 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

292nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	39	26	15

Rank under other weightings: 275th to 309th.

Stable low: below 45 under every weighting

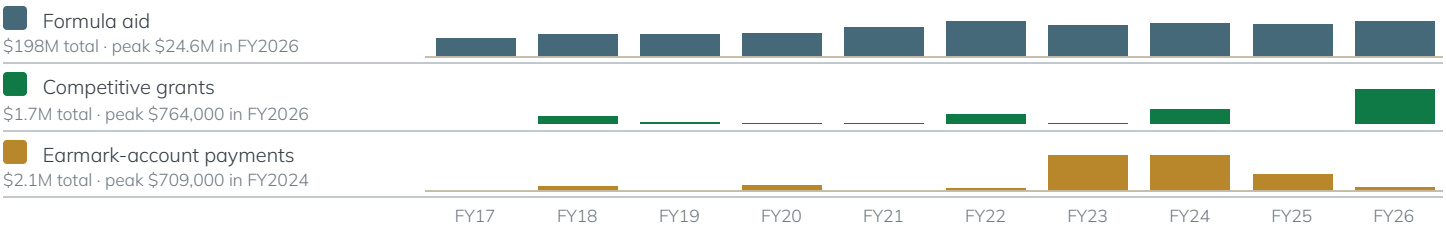
Belmont received less than its share of discretionary money on all four measures; its blended score of 25 stays between 20 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Belmont's town government and school districts received $198 million in formula aid and $1.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$198M	$1.7M	$2.1M
$7,271 per resident (278th of 351) · gross	$63.18 per resident (344th of 351)	$77.49 per resident (37th of 351)

Competitive grants to Belmont peaked in FY2026 at $764,000, 45% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.3 million, are not shown.

EARMARKS

Belmont received $2.9 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.9M	$2.9M	$2.9M	Not a member
$105 per resident (42nd of 351)	$105 per resident (63rd of 351)	$105 per resident (69th of 351)	35 municipalities had none

Placed in the town: 27 clauses in ten of ten budgets; the most recent in FY2026. Every one names Belmont directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$750,000	"the town of Belmont for environmental remediation and environmental compliance costs, including the cost of natural refrigerants and related capital..."	Enacted names the town
FY2024	$400,000	"the recruitment, retention and compensation of kindergarten assistants in public schools in the town of Belmont"	Enacted names the town
FY2022	$125,000	"the town of Belmont to redesign the intersections of Winter street at Concord avenue and Mill street at Concord avenue"	Enacted names the town
FY2024	$120,000	"the closure and demolition of Skip Viglirolo ice rink in the town of Belmont"	Enacted names the town
FY2025	$100,000	"sidewalk repairs in Belmont"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Belmont received 65% of its proportional share of competitive grant awards.

Local road miles **74.7** 174th of 351 · 2.7 per 1,000 residents (325th of 351)	Town-owned bridges, replacement cost **$1.2M** scored exposure $636,000 · 0.5 in poor condition	Road-stream crossings **18** 330th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.6 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **27,377** residents plus seasonal	Core infrastructure index **1.31** roads, culverts, dams, coast, flood, energy

Burden index 0.65; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$30,849** FY2017–2025 · 102nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.9% of Belmont's general-fund spending in FY2025, down from 11.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.9%** $7.8M of $65.4M · median town 14.1%	FY2016 **9.3%** $9M of $95.8M · median town 12.2%	FY2025 **9.9%** $15.2M of $154M · median town 11.5%	Net of state charges, FY2025 **8.4%** FY2010: 7.4% · median town 10.0%

Belmont's state aid kept pace with both price measures: FY2025 aid was 25.2% above its FY2006 aid grown by Boston-area consumer prices and 11.3% above grown by the government price index.

Gross state aid went from $7.8 million in FY2006 to $15.2 million in FY2025, +94.2% in dollars. Flag: in FY2010, $537,000 of Belmont's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+41.6%** $15.1M to $21.4M · all towns +54.0%	All fixed costs, FY2016–25 **+43.1%** $19.2M to $27.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Belmont's health insurance would have been $18.9 million in FY2025; it was $21.4 million, $2.52 million above the path. Its fixed costs would have been $24 million in FY2025; it was $27.5 million, $3.49 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Belmont came to $2.7 million, 43.2% of the $6.28 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.7M	43.2%	28.2%
Placed in the town	$2.7M	43.2%	42.3%
Everything placed	$2.7M	43.2%	45.2%

SCHOOLS

Belmont's required school contribution is 2.6% of median household income, 182nd highest of 351.

Chapter 70 aid, FY2026 **$12.9M** to the town's district	Required local contribution **$49.9M** FY2026
Share of household income **2.6%** 182nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Belmont runs its own school district.

EXPECTED AND ACTUAL

Belmont received $4.7 million in earmarks placed in the town and competitive grants over ten years, 60% of the $7.7 million its size, need and institutions predict.

PEERS

Belmont ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Belmont this town	**32**	**$7,271**	**$63.18**	**$105**	**0.65**	**2.6%**
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Needham peer	28	$6,664	$33.58	$150	0.21	2.5%
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Berkley

Town · Bristol County · 6,829 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
12th Bristol · Norman J. Orrall

STATE SENATE
Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS
Berkley Public Schools, the town's own district
Somerset Berkley Regional School District, shared with Somerset
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Bridgewater, Dighton, Freetown, Middleborough, Raynham, Rehoboth and Taunton

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Berkley scores 51 on the Fairness Index for all state aid and 13 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

118th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	61	45	47

Rank under other weightings: 101st to 133rd.

Near fair: between 45 and 55 under every weighting

Berkley received less than its share of state aid on three of four measures; its blended score of 51 stays between 48 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

13 / 100

338th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
12	18	12	11

Rank under other weightings: 335th to 340th.

Stable low: below 45 under every weighting

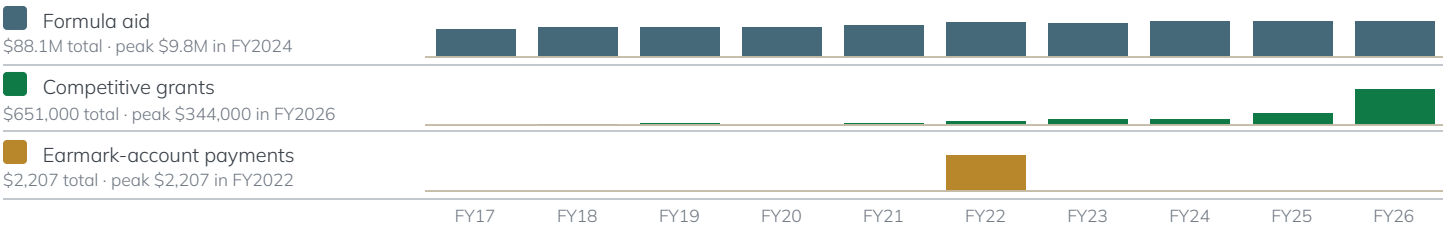
Berkley received less than its share of discretionary money on all four measures; its blended score of 13 stays between 12 and 14 under every weighting tested.

STATE MONEY, FY2017–FY2026

Berkley's town government and school districts received $88.1 million in formula aid and $651,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$88.1M	**$651,000**	**$2,207**
$12,903 per resident (113th of 351) · gross	$95.35 per resident (326th of 351)	$0.32 per resident (333rd of 351)

Competitive grants to Berkley peaked in FY2026 at $344,000, 53% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.7 million, are not shown.

EARMARKS

Berkley received $95,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$95,000	**$95,000**	**$95,000**	**Not a member**
$13.91 per resident (287th of 351)	$13.91 per resident (295th of 351)	$13.91 per resident (296th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2025. Every one names Berkley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$30,000	"enhance services at the Berkley council on aging"	Enacted names the town
FY2025	$25,000	"Berkley for a sidewalk that would connect the middle school to the town common"	Enacted names the town
FY2020	$20,000	"renovations to the historic library in the town of Berkley"	Enacted names the town
FY2020	$10,000	"enhance services at the Berkley council on aging"	Enacted names the town
FY2019	$10,000	"enhance services at the Berkley Council on Aging"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Berkley received 18% of its proportional share of competitive grant awards.

Local road miles **54.3** 235th of 351 · 8.0 per 1,000 residents (138th of 351)	Town-owned bridges, replacement cost **$14.4M** scored exposure $1.3M · none in poor condition	Road-stream crossings **46** 279th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.5 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **6,879** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.18; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **150 acres** 1.4% of land area · FY2026	State-owned land PILOT, FY2026 **$61,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$406** statewide $117 · FY2026	New growth per resident **$16,883** FY2017–2025 · 230th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 24.6% of Berkley's general-fund spending in FY2025, down from 51.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **51.3%** $7.1M of $13.8M · median town 14.1%	FY2016 **34.8%** $5.8M of $16.8M · median town 12.2%	FY2025 **24.6%** $6M of $24.4M · median town 11.5%	Net of state charges, FY2025 **23.4%** FY2010: 45.4% · median town 10.0%

Berkley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Berkley's state aid did not keep pace with either price measure: FY2025 aid was 45.2% below its FY2006 aid grown by Boston-area consumer prices and 51.3% below grown by the government price index.

Gross state aid went from $7.1 million in FY2006 to $6 million in FY2025, −15.0% in dollars. Flag: in FY2010, $1 million of Berkley's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.4%** $1M to $1.4M · all towns +54.0%	All fixed costs, FY2016–25 **+23.3%** $2M to $2.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Berkley's health insurance would have been $1.26 million in FY2025; it was $1.36 million, $97,000 above the path. Its fixed costs would have been $2.46 million in FY2025; it was $2.43 million, $31,000 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (−40%), FY2022 (−57%), FY2023 (+168%) and FY2025 (+52%); health insurance changed by more than 30% in one year in FY2017 (−74%) and FY2025 (+227%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Berkley came to $95,000, 27.3% of the $348,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$95,000	27.3%	28.2%
Placed in the town	$95,000	27.3%	42.3%
Everything placed	$95,000	27.3%	45.2%

SCHOOLS

Berkley's required school contribution is 2.7% of median household income, 171st highest of 351.

Chapter 70 aid, FY2026 **$7M** to the town's district	Required local contribution **$8.8M** FY2026
Share of household income **2.7%** 171st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–0%** after inflation

Berkley runs its own district for some grades and belongs to Somerset Berkley, Bristol Plymouth and Bristol County for others; Berkley accounts for 25%, 8% and 3% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Berkley received $746,000 in earmarks placed in the town and competitive grants over ten years, 19% of the $4 million its size, need and institutions predict.

PEERS

Berkley ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Berkley this town	**51**	**$12,903**	**$95.35**	**$13.91**	**0.18**	**2.7%**
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
Paxton peer	40	$9,789	$93.21	$32.99	0.11	2.5%
Rutland peer	59	$17,290	$124	$22.03	0.61	2.2%
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Halifax peer	48	$12,543	$155	$155	0.34	2.6%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Shutesbury lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Berlin

Town · Worcester County · 3,378 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Worcester · Meghan K. Kilcoyne

STATE SENATE

First Worcester · Robyn K. Kennedy

SCHOOL DISTRICTS

Berlin-Boylston Regional School District, shared with Boylston

Assabet Valley Regional Vocational Technical School District, vocational, shared with Hudson, Marlborough, Maynard, Northborough, Southborough and Westborough

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Berlin scores 32 on the Fairness Index for all state aid and 60 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

285th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	42	30	25

Rank under other weightings: 273rd to 292nd.

Stable low: below 45 under every weighting

Berlin received less than its share of state aid on all four measures; its blended score of 33 stays between 30 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

60 / 100

141st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	69	57	51

Rank under other weightings: 134th to 152nd.

Stable high: above 55 under every weighting

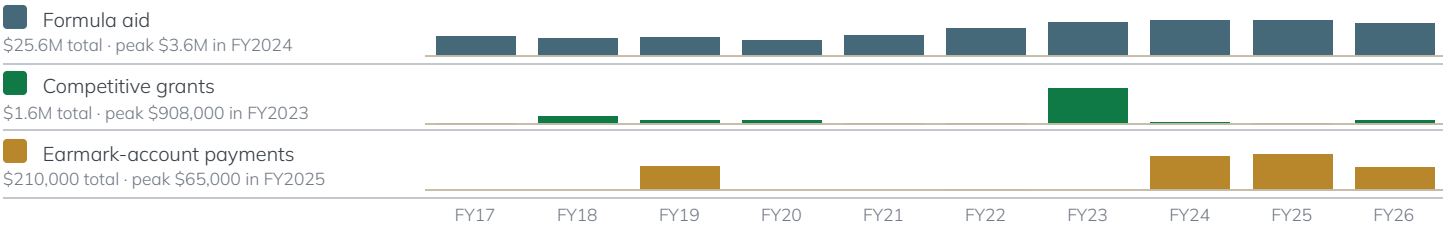
Berlin received more than its share of discretionary money on all four measures; its blended score of 60 stays between 56 and 63 under every weighting tested.

STATE MONEY, FY2017–FY2026

Berlin's town government and school districts received $25.6 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$25.6M	**$1.6M**	**$210,000**
$7,567 per resident (272nd of 351) · gross	$464 per resident (148th of 351)	$62.25 per resident (50th of 351)

Competitive grants to Berlin peaked in FY2023 at $908,000, 58% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.1 million, are not shown.

EARMARKS

Berlin received $353,000 in local earmarks naming the town, $303,000 placed in the town and $353,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$353,000	**$303,000**	**$353,000**	**Not a member**
$104 per resident (46th of 351)	$89.70 per resident (87th of 351)	$104 per resident (72nd of 351)	35 municipalities had none

Placed in the town: eight clauses in five of ten budgets; the most recent in FY2026. Every one names Berlin directly.

Names the town includes $50,000 in clauses that name Berlin but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Berlin (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$60,000	"the Worcester Regional Transit Authority for the establishment of a Senior Van and Paratransit Service in the town of Berlin"	Enacted names the town
FY2026	$50,000	"the town of Berlin for a firepole and associated construction to provide access from the firehouse dormitories to the apparatus bay"	Enacted names the town
FY2024	$50,000	"public safety equipment for the Berlin fire department"	Enacted names the town
FY2025	$40,000	"the town of Berlin for renovations to the public safety complex"	Enacted names the town
FY2024	$35,000	"public safety upgrades, including the purchase of automated external defibrillators, in the town of Berlin"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Berlin received 2.37 times its proportional share of competitive grant awards.

Local road miles **42.0** 284th of 351 · 12.4 per 1,000 residents (82nd of 351)	Town-owned bridges, replacement cost **$8.6M** scored exposure $4M · three in poor condition	Road-stream crossings **106** 107th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.0 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **3,378** residents plus seasonal	Core infrastructure index **4.11** roads, culverts, dams, coast, flood, energy

Burden index 2.37; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$48,634** FY2017–2025 · 39th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

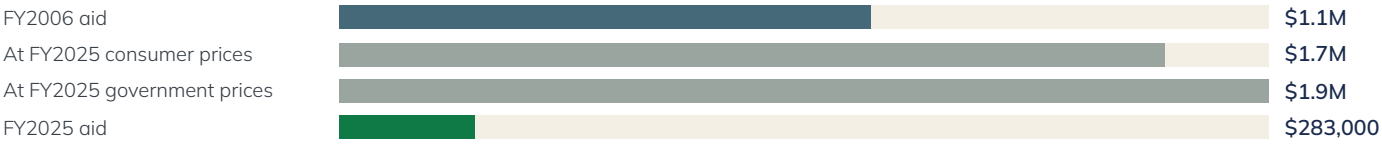
State aid covered 1.7% of Berlin's general-fund spending in FY2025, down from 14.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.0%** $1.1M of $7.9M · median town 14.1%	FY2016 **6.8%** $805,000 of $11.9M · median town 12.2%	FY2025 **1.7%** $283,000 of $16.9M · median town 11.5%	Net of state charges, FY2025 **1.4%** FY2010: 8.6% · median town 10.0%

Berlin's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Berlin's state aid did not keep pace with either price measure: FY2025 aid was 83.5% below its FY2006 aid grown by Boston-area consumer prices and 85.4% below grown by the government price index.



Gross state aid went from $1.1 million in FY2006 to $283,000 in FY2025, −74.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **−15.3%** $747,000 to $633,000 · all towns +54.0%	All fixed costs, FY2016–25 **+21.5%** $1.3M to $1.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Berlin's health insurance would have been $932,000 in FY2025; it was $633,000, $300,000 below the path. Its fixed costs would have been $1.58 million in FY2025; it was $1.54 million, $43,000 below the path.

Flag: health insurance changed by more than 30% in one year in FY2020 (−43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Berlin's reported health insurance fell from $747,000 in FY2016 to $633,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$303,000	no increase	28.2%
Placed in the town	$253,000	no increase	42.3%
Everything placed	$303,000	no increase	45.2%

SCHOOLS

Berlin's required school contribution is 2.7% of median household income, 170th highest of 351.

Chapter 70 aid, FY2026 **$2M** attributed to the town	Required local contribution **$4.7M** FY2026
Share of household income **2.7%** 170th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+26%** after inflation

Berlin has no school district of its own. Its pupils attend Berlin-Boylston and Assabet Valley; Berlin accounts for 40% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Berlin received $2 million in earmarks placed in the town and competitive grants over ten years, 75% of the $2.6 million its size, need and institutions predict.

PEERS

Berlin ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Berlin this town	**32**	**$7,567**	**$464**	**$89.70**	**2.37**	**2.7%**
Essex peer	32	$7,261	$477	$208	0.75	2.6%
Boylston peer	32	$7,545	$121	$68.71	0.67	2.6%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Hinsdale lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Bernardston

Town · Franklin County · 2,164 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Pioneer Valley Regional School District, shared with Leyden and Northfield
Franklin County Regional Vocational Technical School District, vocational, shared with Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Bernardston scores 55 on the Fairness Index for all state aid and 80 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

83rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	54	57	50

Rank under other weightings: 61st to 100th.

Weighting-dependent: the range crosses the 45–55 band

Bernardston received more than its share of state aid on all four measures; its blended score of 55 stays between 53 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

80 / 100

77th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	80	80	77

Rank under other weightings: 70th to 79th.

Stable high: above 55 under every weighting

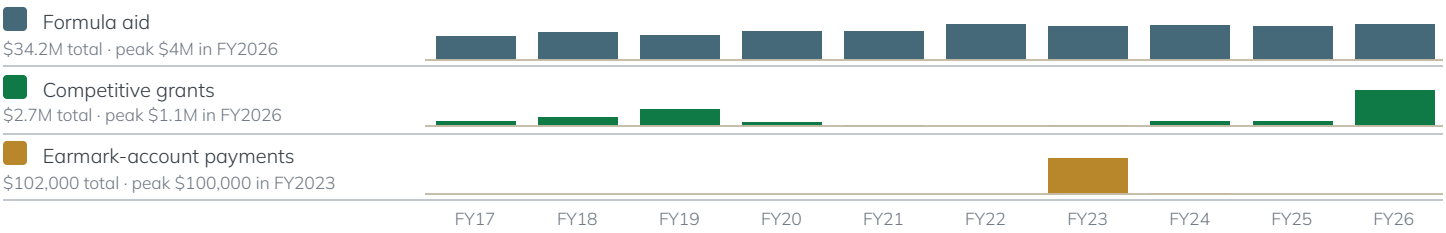
Bernardston received more than its share of discretionary money on all four measures; its blended score of 80 stays between 79 and 81 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bernardston's town government and school districts received $34.2 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$34.2M	**$2.7M**	**$102,000**
$15,799 per resident (65th of 351) · gross	$1,227 per resident (65th of 351)	$47.11 per resident (85th of 351)

Competitive grants to Bernardston peaked in FY2026 at $1.1 million, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.4 million, are not shown.

EARMARKS

No local earmark was placed in Bernardston in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $102,000 in payments to Bernardston's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Bernardston.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Bernardston's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
East Brookfield	$205,000	$205,000	$205,000	$94.64
Lanesborough	$0	$0	$0	$0
Phillipston	$150,000	$150,000	$150,000	$79.16
Gill	$88,000	$88,000	$88,000	$50.29
Petersham	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Bernardston received 44% of its proportional share of competitive grant awards.

Local road miles **41.7** 286th of 351 · 19.3 per 1,000 residents (60th of 351)	Town-owned bridges, replacement cost **$7.8M** scored exposure $2.7M · none in poor condition	Road-stream crossings **51** 258th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **23.4 sq mi** 12% state-owned	Seasonal homes **0%** share of housing units	Peak service population **2,164** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.44; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,623 acres** 10.8% of land area · FY2026	State-owned land PILOT, FY2026 **$58,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$35.80** statewide $117 · FY2026	New growth per resident **$19,092** FY2017–2025 · 201st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.9% of Bernardston's general-fund spending in FY2025, down from 13.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.6%** $529,000 of $3.9M · median town 14.1%	FY2016 **6.1%** $302,000 of $5M · median town 12.2%	FY2025 **6.9%** $445,000 of $6.5M · median town 11.5%	Net of state charges, FY2025 **6.7%** FY2010: 9.3% · median town 10.0%

Bernardston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bernardston's state aid did not keep pace with either price measure: FY2025 aid was 45.8% below its FY2006 aid grown by Boston-area consumer prices and 51.8% below grown by the government price index.

Gross state aid went from $529,000 in FY2006 to $445,000 in FY2025, −15.9% in dollars. Flag: in FY2010, $102,000 of Bernardston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+74.4%** $85,000 to $147,000 · all towns +54.0%	All fixed costs, FY2016–25 **+111.4%** $188,000 to $397,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bernardston's health insurance would have been $106,000 in FY2025; it was $147,000, $42,000 above the path. Its fixed costs would have been $235,000 in FY2025; it was $397,000, $163,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (+33%) and FY2024 (+30%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bernardston came to $0, 0.0% of the $63,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Bernardston's required school contribution is 2.9% of median household income, 109th highest of 351.

Chapter 70 aid, FY2026 **$2.3M** attributed to the town	Required local contribution **$2.2M** FY2026
Share of household income **2.9%** 109th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Bernardston has no school district of its own. Its pupils attend Pioneer and Franklin County; Bernardston accounts for 42% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Bernardston received $2.8 million in earmarks placed in the town and competitive grants over ten years, 49% of the $5.8 million its size, need and institutions predict.

PEERS

Bernardston is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bernardston this town	**55**	**$15,799**	**$1,227**	**$0**	**0.44**	**2.9%**
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
Lanesborough peer · lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Gill peer	40	$9,063	$224	$50.29	0.47	2.3%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Beverly

City · Essex County · 42,665 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Essex · Hannah Bowen and Jerald A. Parisella (until May 2025)

STATE SENATE

Second Essex · Joan B. Lovely

SCHOOL DISTRICTS

Beverly Public Schools, the city's own district

Essex North Shore Agricultural and Technical School District, vocational, shared with Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Beverly scores 27 on the Fairness Index for all state aid and 35 for discretionary money. Fifty is a fair share.

ALL STATE AID

27 / 100

336th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	26	31	24

Rank under other weightings: 313th to 340th.

Stable low: below 45 under every weighting

Beverly received less than its share of state aid on all four measures; its blended score of 27 stays between 26 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

35 / 100

248th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	35	38	32

Rank under other weightings: 241st to 252nd.

Stable low: below 45 under every weighting

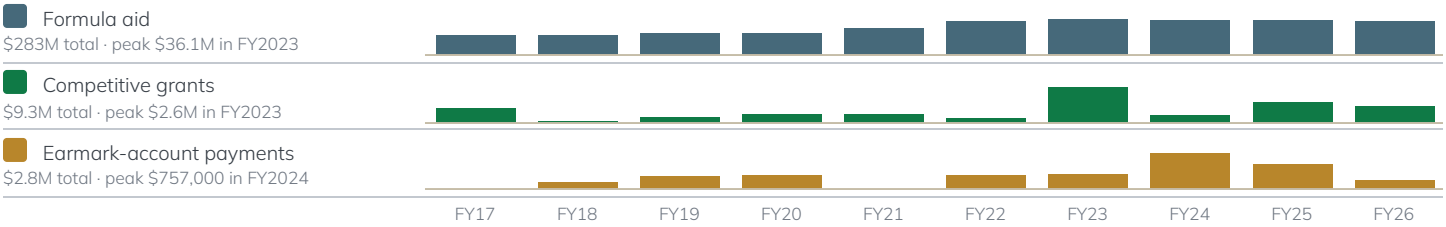
Beverly received less than its share of discretionary money on all four measures; its blended score of 35 stays between 34 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Beverly's town government and school districts received $283 million in formula aid and $9.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$283M	**$9.3M**	**$2.8M**
$6,643 per resident (308th of 351) · gross	$218 per resident (243rd of 351)	$65.68 per resident (45th of 351)

Competitive grants to Beverly peaked in FY2023 at $2.6 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $31.8 million, are not shown.

EARMARKS

Beverly received $3 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$3M	**$3M**	**$3M**	**Not a member**
$69.85 per resident (85th of 351)	$69.85 per resident (114th of 351)	$69.85 per resident (122nd of 351)	35 municipalities had none

Placed in the town: 25 clauses in ten of ten budgets; the most recent in FY2026. Every one names Beverly directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$250,000	"road and sidewalk repair and improvements on Elliott street in the city of Beverly"	Enacted names the town
FY2022	$250,000	"address traffic and safety issues on Route 62 in the city of Beverly"	Enacted names the town
FY2025	$200,000	"the renovation of Gillis park in the city of Beverly"	Enacted names the town
FY2023	$200,000	"the city of Beverly for the construction of pickleball courts"	Enacted names the town
FY2023	$200,000	"the city of Beverly for facility upgrades and improvements to the Beverly public library"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Beverly received about its proportional share of competitive grant awards.

Local road miles **130.7** 51st of 351 · 3.1 per 1,000 residents (315th of 351)	Town-owned bridges, replacement cost **$3.7M** scored exposure $3.4M · one in poor condition	Road-stream crossings **121** 75th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.1 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **42,755** residents plus seasonal	Core infrastructure index **0.79** roads, culverts, dams, coast, flood, energy

Burden index 0.97; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$4,892** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$4,844** statewide $117 · FY2026	New growth per resident **$20,023** FY2017–2025 · 182nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.6% of Beverly's general-fund spending in FY2025, down from 15.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.8%** $15.5M of $98.1M · median town 14.1%	FY2016 **12.6%** $14.9M of $118M · median town 12.2%	FY2025 **13.6%** $23.5M of $173M · median town 11.5%	Net of state charges, FY2025 **12.4%** FY2010: 14.0% · median town 10.0%

Beverly's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $863,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Beverly's state aid did not keep pace with either price measure: FY2025 aid was 2.3% below its FY2006 aid grown by Boston-area consumer prices and 13.2% below grown by the government price index.

Gross state aid went from $15.5 million in FY2006 to $23.5 million in FY2025, +51.5% in dollars. Flag: in FY2010, $2.5 million of Beverly's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+52.1%** $20.7M to $31.4M · all towns +54.0%	All fixed costs, FY2016–25 **+45.5%** $27.1M to $39.4M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Beverly's health insurance would have been $25.8 million in FY2025; it was $31.4 million, $5.62 million above the path. Its fixed costs would have been $33.8 million in FY2025; it was $39.4 million, $5.59 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Beverly came to $2.9 million, 26.8% of the $10.8 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.9M	26.8%	28.2%
Placed in the town	$2.9M	26.8%	42.3%
Everything placed	$2.9M	26.8%	45.2%

SCHOOLS

Beverly's required school contribution is 3.1% of median household income, 62nd highest of 351.

Chapter 70 aid, FY2026 **$16.5M** to the town's district	Required local contribution **$55.1M** FY2026
Share of household income **3.1%** 62nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+50%** after inflation

Beverly runs its own school district and also belongs to Essex North Shore; Beverly accounts for 14% of that district's foundation budget.

EXPECTED AND ACTUAL

Beverly received $16.2 million in earmarks placed in the town and competitive grants over ten years, about the $16.6 million its size, need and institutions predict.

PEERS

Beverly ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Beverly this town	**27**	**$6,643**	**$218**	**$69.85**	**0.97**	**3.1%**
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Dartmouth peer	29	$6,506	$296	$157	0.73	3.6%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Weymouth peer	39	$8,687	$450	$104	2.15	2.8%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Billerica

Town · Middlesex County · 42,003 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

22nd Middlesex · Marc T. Lombardo

STATE SENATE

Fourth Middlesex · Cindy F. Friedman

SCHOOL DISTRICTS

Billerica Public Schools, the town's own district

Shawsheen Valley Regional Vocational Technical School District, vocational, shared with Bedford, Burlington, Tewksbury and Wilmington

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Billerica scores 39 on the Fairness Index for all state aid and 9 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

222nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	48	36	37

Rank under other weightings: 206th to 235th.

Stable low: below 45 under every weighting

Billerica received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

9 / 100

349th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
8	12	8	8

Rank under other weightings: 349th to 350th.

Stable low: below 45 under every weighting

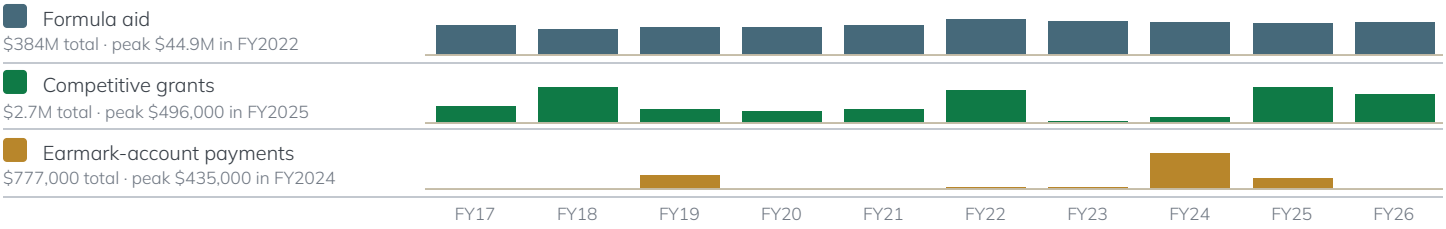
Billerica received less than its share of discretionary money on all four measures; its blended score of 9 stays between 8 and 10 under every weighting tested.

STATE MONEY, FY2017–FY2026

Billerica's town government and school districts received $384 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$384M	$2.7M	$777,000
$9,140 per resident (213th of 351) · gross	$64.58 per resident (342nd of 351)	$18.50 per resident (211th of 351)

Competitive grants to Billerica were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $28.2 million, are not shown.

EARMARKS

Billerica received $904,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$904,000	$904,000	$904,000	Not a member
$21.52 per resident (265th of 351)	$21.52 per resident (275th of 351)	$21.52 per resident (275th of 351)	35 municipalities had none

Placed in the town: 32 clauses in ten of ten budgets; the most recent in FY2026. Every one names Billerica directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$85,000	"the Billerica council on aging for improvements"	Enacted names the town
FY2019	$75,000	"the design and construction of the Lexington and Glad Valley project in the town of Billerica"	Enacted names the town
FY2019	$50,000	"the construction of the Yankee Doodle Bike Path in Billerica"	Enacted names the town
FY2017	$50,000	"a grant to the town of Billerica for the Yankee Doodle Bike Path"	Enacted names the town
FY2020	$45,000	"the restoration and renovation of the Clara Sexton House in Billerica center in the town of Billerica"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Billerica received 29% of its proportional share of competitive grant awards.

Local road miles **200.6** 14th of 351 · 4.8 per 1,000 residents (246th of 351)	Town-owned bridges, replacement cost **$24.3M** scored exposure $9.6M · none in poor condition	Road-stream crossings **104** 112th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **25.6 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **42,024** residents plus seasonal	Core infrastructure index **0.45** roads, culverts, dams, coast, flood, energy

Burden index 0.29; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **335 acres** 2.0% of land area · FY2026	State-owned land PILOT, FY2026 **$263,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$784** statewide $117 · FY2026	New growth per resident **$30,699** FY2017–2025 · 103rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.5% of Billerica's general-fund spending in FY2025, down from 18.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.3%** $20.4M of $111M · median town 14.1%	FY2016 **18.1%** $25.2M of $140M · median town 12.2%	FY2025 **14.5%** $28.7M of $198M · median town 11.5%	Net of state charges, FY2025 **11.7%** FY2010: 14.9% · median town 10.0%

Billerica's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Billerica's state aid did not keep pace with either price measure: FY2025 aid was 9.0% below its FY2006 aid grown by Boston-area consumer prices and 19.2% below grown by the government price index.

Gross state aid went from $20.4 million in FY2006 to $28.7 million in FY2025, +41.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.1%** $18.8M to $26.8M · all towns +54.0%	All fixed costs, FY2016–25 **+41.5%** $29M to $41M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Billerica's health insurance would have been $23.5 million in FY2025; it was $26.8 million, $3.24 million above the path. Its fixed costs would have been $36.2 million in FY2025; it was $41 million, $4.81 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Billerica came to $867,000, 10.9% of the $7.93 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$867,000	10.9%	28.2%
Placed in the town	$867,000	10.9%	42.3%
Everything placed	$867,000	10.9%	45.2%

SCHOOLS

Billerica's required school contribution is 2.7% of median household income, 150th highest of 351.

Chapter 70 aid, FY2026 **$23.9M** to the town's district	Required local contribution **$62.7M** FY2026
Share of household income **2.7%** 150th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–13%** after inflation

Billerica runs its own school district and also belongs to Shawsheen Valley; Billerica accounts for 36% of that district's foundation budget.

EXPECTED AND ACTUAL

Billerica received $3.8 million in earmarks placed in the town and competitive grants over ten years, 36% of the $10.7 million its size, need and institutions predict.

PEERS

Billerica ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Billerica this town	**39**	**$9,140**	**$64.58**	**$21.52**	**0.29**	**2.7%**
Arlington peer	32	$7,131	$184	$64.10	0.96	2.2%
Chelmsford peer	31	$7,630	$194	$41.84	0.37	3.1%
Braintree peer	39	$9,109	$142	$117	0.55	3.4%
Wilmington peer	42	$9,651	$202	$31.68	0.32	2.7%
Melrose peer	35	$7,621	$417	$63.68	2.22	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Blackstone

Town · Worcester County · 9,255 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
8th Worcester · Michael J. Soter

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Blackstone-Millville Regional School District, shared with Millville
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Blackstone scores 51 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

113th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	48	52	52

Rank under other weightings: 100th to 127th.

Near fair: between 45 and 55 under every weighting

Blackstone received more than its share of state aid on three of four measures; its blended score of 51 stays between 50 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

254th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	29	39	32

Rank under other weightings: 243rd to 264th.

Stable low: below 45 under every weighting

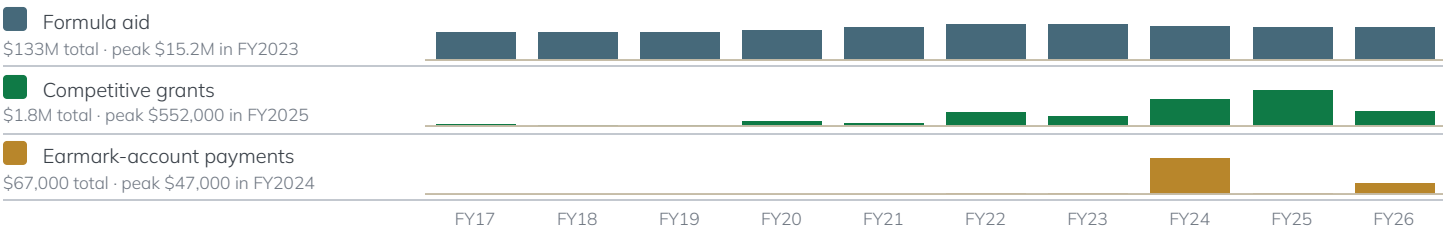
Blackstone received less than its share of discretionary money on all four measures; its blended score of 34 stays between 32 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Blackstone's town government and school districts received $133 million in formula aid and $1.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$133M	$1.8M	$67,000
$14,382 per resident (87th of 351) · gross	$190 per resident (257th of 351)	$7.20 per resident (273rd of 351)

Competitive grants to Blackstone peaked in FY2025 at $552,000, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6 million, are not shown.

EARMARKS

Blackstone received $838,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$838,000	$838,000	$838,000	Not a member
$90.57 per resident (59th of 351)	$90.57 per resident (84th of 351)	$90.57 per resident (93rd of 351)	35 municipalities had none

Placed in the town: 15 clauses in eight of ten budgets; the most recent in FY2026. Every one names Blackstone directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"the Blackstone Valley Chamber of Commerce, Inc. for its sustainability for tomorrow program, operated in conjunction with Whittier Farms, Inc"	Enacted names the town
FY2018	$200,000	"the replacement of a failing culvert in the town of Blackstone"	Enacted names the town
FY2024	$83,000	"the Blackstone Valley Vocational Regional School District for the removal and replacement of an underground storage tank"	Enacted names the town
FY2022	$75,000	"Daniels Farm in the town of Blackstone for restoration of historic buildings"	Enacted names the town
FY2017	$50,000	"a new standby generator and public safety upgrades for the town of Blackstone"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Blackstone received 82% of its proportional share of competitive grant awards.

Local road miles **41.1** 290th of 351 · 4.4 per 1,000 residents (263rd of 351)	Town-owned bridges, replacement cost **$19.4M** scored exposure $11.7M · one in poor condition	Road-stream crossings **69** 200th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **11.1 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **9,255** residents plus seasonal	Core infrastructure index **1.97** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **288 acres** 4.1% of land area · FY2026	State-owned land PILOT, FY2026 **$47,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$163** statewide $117 · FY2026	New growth per resident **$18,554** FY2017–2025 · 207th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.5% of Blackstone's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $1.4M of $15.1M · median town 14.1%	FY2016 **7.9%** $1.5M of $19.2M · median town 12.2%	FY2025 **7.5%** $2.1M of $28M · median town 11.5%	Net of state charges, FY2025 **7.3%** FY2010: 9.1% · median town 10.0%

Blackstone's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Blackstone's state aid did not keep pace with either price measure: FY2025 aid was 3.0% below its FY2006 aid grown by Boston-area consumer prices and 13.8% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $2.1 million in FY2025, +50.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.8%** $538,000 to $800,000 · all towns +54.0%	All fixed costs, FY2016–25 **+96.3%** $1.2M to $2.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Blackstone's health insurance would have been $671,000 in FY2025; it was $800,000, $129,000 above the path. Its fixed costs would have been $1.44 million in FY2025; it was $2.26 million, $824,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Blackstone came to $823,000, 3.1 times the $263,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$823,000	3.1 times	28.2%
Placed in the town	$823,000	3.1 times	42.3%
Everything placed	$823,000	3.1 times	45.2%

SCHOOLS

Blackstone's required school contribution is 2.6% of median household income, 174th highest of 351.

Chapter 70 aid, FY2026 **$9.9M** attributed to the town	Required local contribution **$9.7M** FY2026
Share of household income **2.6%** 174th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Blackstone has no school district of its own. Its pupils attend Blackstone, Blackstone-Millville and Blackstone Valley; Blackstone accounts for 100%, 75% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Blackstone received $2.7 million in earmarks placed in the town and competitive grants over ten years, 70% of the $3.8 million its size, need and institutions predict.

PEERS

Blackstone ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Blackstone this town	**51**	**$14,382**	**$190**	**$90.57**	**0.82**	**2.6%**
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Dudley peer	60	$17,447	$442	$36.88	1.55	2.5%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Blandford

Town · Hampden County · 1,156 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Gateway Regional School District**, shared with Chester, Huntington, Middlefield, Montgomery and Russell	Pioneer Valley Planning Commission

FAIRNESS INDEX

Blandford scores 52 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

105th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	57	48	49

Rank under other weightings: 89th to 114th.

Near fair: between 45 and 55 under every weighting

Blandford received less than its share of state aid on two of four measures; its blended score of 52 stays between 50 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

17th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	90	97

Rank under other weightings: 14th to 18th.

Stable high: above 55 under every weighting

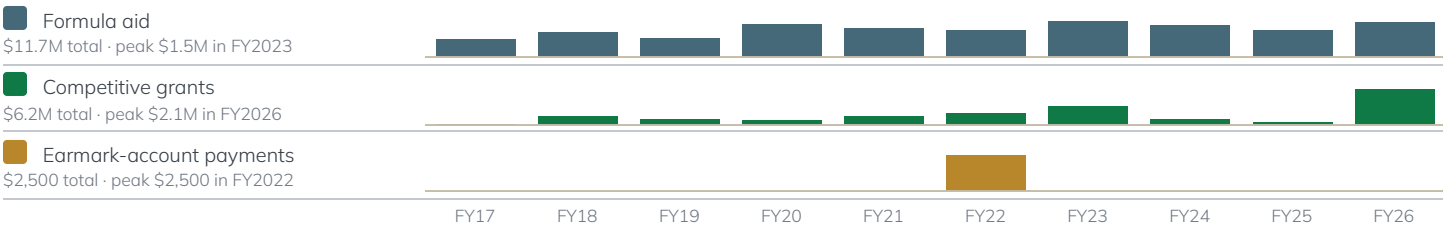
Blandford received more than its share of discretionary money on all four measures; its blended score of 96 stays between 94 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Blandford's town government and school districts received $11.7 million in formula aid and $6.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.7M	**$6.2M**	**$2,500**
$10,142 per resident (173rd of 351) · gross	$5,405 per resident (14th of 351)	$2.16 per resident (312th of 351)

Competitive grants to Blandford peaked in FY2026 at $2.1 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

No local earmark was placed in Blandford in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Blandford's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Blandford.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Blandford's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Worthington	$60,000	$60,000	$60,000	$58.77
West Stockbridge	$0	$0	$0	$0
Chesterfield	$0	$225,000	$225,000	$213
Richmond	$0	$0	$0	$0
Leverett	$215,000	$215,000	$215,000	$134

WHAT THE TOWN CARRIES

Measured against what it maintains, Blandford received 80% of its proportional share of competitive grant awards.

Local road miles **64.0** 204th of 351 · 55.4 per 1,000 residents (19th of 351)	Town-owned bridges, replacement cost **$6.1M** scored exposure $1.4M · one in poor condition	Road-stream crossings **148** 42nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **51.6 sq mi** 8% state-owned	Seasonal homes **6%** share of housing units	Peak service population **1,230** residents plus seasonal	Core infrastructure index **0.17** roads, culverts, dams, coast, flood, energy

Burden index 0.80; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,146 acres** 6.5% of land area · FY2026	State-owned land PILOT, FY2026 **$40,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$18.57** statewide $117 · FY2026	New growth per resident **$45,893** FY2017–2025 · 44th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.0% of Blandford's general-fund spending in FY2025, down from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $171,000 of $2M · median town 14.1%	FY2016 **5.4%** $210,000 of $3.9M · median town 12.2%	FY2025 **7.0%** $298,000 of $4.3M · median town 11.5%	Net of state charges, FY2025 **6.8%** FY2010: 6.2% · median town 10.0%

Blandford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $452,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Blandford's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 12.3% above its FY2006 aid grown by Boston-area consumer prices and 0.2% below grown by the government price index.

Gross state aid went from $171,000 in FY2006 to $298,000 in FY2025, +74.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–2.4%** $67,000 to $66,000 · all towns +54.0%	All fixed costs, FY2016–25 **+160.7%** $121,000 to $316,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Blandford's health insurance would have been $84,000 in FY2025; it was $66,000, $18,000 below the path. Its fixed costs would have been $151,000 in FY2025; it was $316,000, $165,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+32%), FY2021 (+30%) and FY2024 (+30%); health insurance changed by more than 30% in one year in FY2018 (–35%), FY2020 (–37%), FY2021 (+68%), FY2024 (+41%) and FY2025 (–42%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Blandford's reported health insurance fell from $67,000 in FY2016 to $66,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Blandford's required school contribution is 2.6% of median household income, 203rd highest of 351.

Chapter 70 aid, FY2026 **$546,000** attributed to the town	Required local contribution **$1.2M** FY2026
Share of household income **2.6%** 203rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+23%** after inflation

Blandford has no school district of its own. Its pupils attend Blandford and Gateway; Blandford accounts for 100% and 13% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Blandford received $6.2 million in earmarks placed in the town and competitive grants over ten years, 2.2 times the $2.9 million its size, need and institutions predict.

PEERS

Blandford is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Blandford this town	**52**	**$10,142**	**$5,405**	**$0**	**0.80**	**2.6%**
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
West Stockbridge peer · lowest in class of 30	43	$9,304	$478	$0	0.46	2.4%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Bolton

Town · Worcester County · 5,737 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Middlesex · Kate Hogan

STATE SENATE

First Worcester · Robyn K. Kennedy

SCHOOL DISTRICTS

Nashoba Regional School District, shared with Lancaster and Stow
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Concord, Dover, Lancaster, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Bolton scores 35 on the Fairness Index for all state aid and 73 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

258th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	54	26	25

Rank under other weightings: 225th to 289th.

Stable low: below 45 under every weighting

Bolton received less than its share of state aid on three of four measures; its blended score of 35 stays between 29 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

73 / 100

94th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	85	73	62

Rank under other weightings: 85th to 110th.

Stable high: above 55 under every weighting

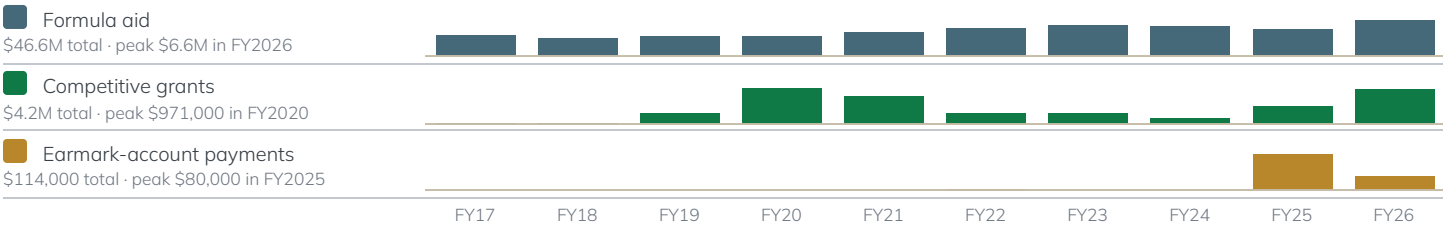
Bolton received more than its share of discretionary money on all four measures; its blended score of 73 stays between 69 and 77 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bolton's town government and school districts received $46.6 million in formula aid and $4.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$46.6M	**$4.2M**	**$114,000**
$8,127 per resident (247th of 351) · gross	$737 per resident (105th of 351)	$19.95 per resident (204th of 351)

Competitive grants to Bolton peaked in FY2020 at $971,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.1 million, are not shown.

EARMARKS

Bolton received $360,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$360,000	**$360,000**	**$360,000**	**Not a member**
$62.75 per resident (107th of 351)	$62.75 per resident (135th of 351)	$62.75 per resident (141st of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names Bolton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the development and engineering of a second means of egress for the Florence Sawyer school building complex in the town of Bolton"	Enacted names the town
FY2022	$100,000	"culvert repair and replacement in the town of Bolton"	Enacted names the town
FY2025	$75,000	"rural infrastructure improvements to the town of Bolton"	Enacted names the town
FY2023	$25,000	"culvert design, repair and replacement in Bolton"	Enacted names the town
FY2026	$20,000	"Bolton Community Fund, Inc. for the continuation of the Bolton 5K and Fun Run Festival"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Bolton received 1.64 times its proportional share of competitive grant awards.

Local road miles **61.5** 213th of 351 · 10.7 per 1,000 residents (98th of 351)	Town-owned bridges, replacement cost **$767,000** scored exposure $67,000 · none in poor condition	Road-stream crossings **114** 87th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.9 sq mi** 5% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,737** residents plus seasonal	Core infrastructure index **1.87** roads, culverts, dams, coast, flood, energy

Burden index 1.64; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **535 acres** 4.2% of land area · FY2026	State-owned land PILOT, FY2026 **$21,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$38.94** statewide $117 · FY2026	New growth per resident **$20,848** FY2017–2025 · 172nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

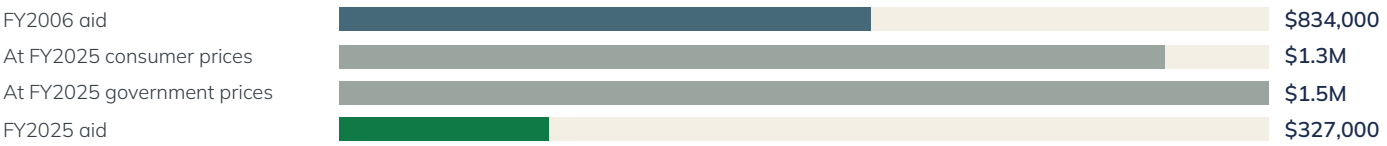
State aid covered 1.1% of Bolton's general-fund spending in FY2025, down from 5.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.4%** $834,000 of $15.4M · median town 14.1%	FY2016 **3.0%** $657,000 of $21.5M · median town 12.2%	FY2025 **1.1%** $327,000 of $30.2M · median town 11.5%	Net of state charges, FY2025 **0.8%** FY2010: 3.4% · median town 10.0%

Bolton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bolton's state aid did not keep pace with either price measure: FY2025 aid was 74.7% below its FY2006 aid grown by Boston-area consumer prices and 77.5% below grown by the government price index.



Gross state aid went from $834,000 in FY2006 to $327,000 in FY2025, −60.8% in dollars. Flag: in FY2010, $432,000 of Bolton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+86.3%** $372,000 to $694,000 · all towns +54.0%	All fixed costs, FY2016–25 **+115.2%** $829,000 to $1.8M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bolton's health insurance would have been $465,000 in FY2025; it was $694,000, $229,000 above the path. Its fixed costs would have been $1.04 million in FY2025; it was $1.79 million, $749,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bolton came to $340,000, 105.8% of the $321,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$340,000	105.8%	28.2%
Placed in the town	$340,000	105.8%	42.3%
Everything placed	$340,000	105.8%	45.2%

SCHOOLS

Bolton's required school contribution is 2.8% of median household income, 120th highest of 351.

Chapter 70 aid, FY2026 **$3.3M** attributed to the town	Required local contribution **$11.5M** FY2026
Share of household income **2.8%** 120th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+33%** after inflation

Bolton has no school district of its own. Its pupils attend Bolton, Nashoba and Minuteman; Bolton accounts for 100%, 33% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Bolton received $4.6 million in earmarks placed in the town and competitive grants over ten years, 2.0 times the $2.3 million its size, need and institutions predict.

PEERS

Bolton ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bolton this town	**35**	**$8,127**	**$737**	**$62.75**	**1.64**	**2.8%**
West Newbury peer	48	$10,655	$574	$38.12	0.91	2.1%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

SUFFOLK COUNTY

Boston

City · Suffolk County · 666,442 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Suffolk · Christopher J. Worrell 7% of residents
8th Suffolk · Jay D. Livingstone 7% of residents
14th Suffolk · Rob Consalvo 7% of residents
15th Suffolk · Samantha Montaño 7% of residents
7th Suffolk · Chynah Tyler 7% of residents
6th Suffolk · Russell E. Holmes 7% of residents
4th Suffolk · David Biele 6% of residents
3rd Suffolk · Aaron Michlewitz 6% of residents
1st Suffolk · Adrian C. Madaro 6% of residents
13th Suffolk · Daniel J. Hunt 6% of residents
9th Suffolk · John Francis Moran 6% of residents
17th Suffolk · Kevin G. Honan 6% of residents
10th Suffolk · William F. MacGregor 6% of residents
18th Suffolk · Michael J. Moran 6% of residents
12th Suffolk · Brandy Fluker-Reid 5% of residents
2nd Suffolk · Daniel J. Ryan 5% of residents

Boston is split among 16 House districts. Shares are of 2020 residents.

STATE SENATE

First Suffolk · Nick Collins 27% of residents
Second Suffolk · Liz Miranda 27% of residents
Suffolk and Middlesex · William N. Brownsberger 16% of residents
Third Suffolk · Lydia Edwards 15% of residents
Norfolk and Suffolk · Michael F. Rush 12% of residents
Middlesex and Suffolk · Sal N. DiDomenico 3% of residents

SCHOOL DISTRICTS

Boston Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Boston scores 43 on the Fairness Index for all state aid and 36 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

187th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	39	52	39

Rank under other weightings: 158th to 231st.

Stable low: below 45 under every weighting

Boston received less than its share of state aid on three of four measures; its blended score of 43 stays between 40 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

36 / 100

240th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	37	33	37

Rank under other weightings: 228th to 247th.

Stable low: below 45 under every weighting

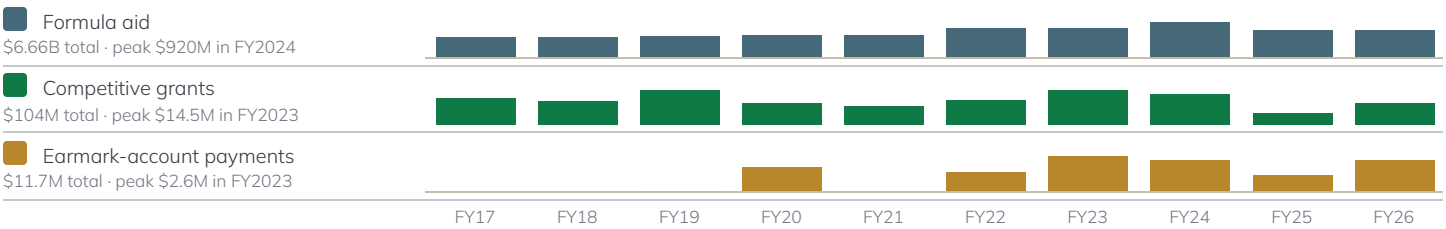
Boston received less than its share of discretionary money on all four measures; its blended score of 36 stays between 35 and 37 under every weighting tested.

STATE MONEY, FY2017–FY2026

Boston's town government and school districts received $6.66 billion in formula aid and $104 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$6.66B	**$104M**	**$11.7M**
$9,995 per resident (177th of 351) · gross	$157 per resident (283rd of 351)	$17.49 per resident (217th of 351)

Competitive grants to Boston were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.34 billion, are not shown.

EARMARKS

Boston received $105 million in local earmarks naming the town, $256 million placed in the town and $278

million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$105M	**$256M**	**$278M**	**Not a member**
$158 per resident (12th of 351)	$384 per resident (3rd of 351)	$416 per resident (5th of 351)	35 municipalities had none

Placed in the town: 1,300 clauses in ten of ten budgets; the most recent in FY2026. $95.8 million came in clauses that name Boston; the other $160 million went to organizations based in Boston, some of which serve a wider area.

Names the town includes $9.6 million in clauses that name Boston but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $21.6 million in 39 clauses for state facilities located in Boston (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$3.3M	"the Juvenile Court Mental Health Advocacy Project administered by Health Law Advocates, Inc. to increase access to mental health treatment for…"	Enacted recipient based here
FY2025	$3.3M	"the Juvenile Court Mental Health Advocacy Project administered by Health Law Advocates, Inc. to increase access to mental health treatment for…"	Enacted recipient based here
FY2026	$3.1M	"the Boston, Cambridge and Everett fire department hazardous material response teams"	Enacted names the town
FY2024	$3M	"the Juvenile Court Mental Health Advocacy Project administered by Health Law Advocates, Inc. to increase access to mental health treatment for…"	Enacted recipient based here
FY2026	$2.5M	"clinical care, education and training in veterans' mental and behavioral health issues, including post-traumatic stress, traumatic brain injury…"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Boston received 53% of its proportional share of competitive grant awards.

Local road miles	Town-owned bridges, replacement cost	Road-stream crossings	Town-owned hazard dams
792.1	**$816M**	**80**	**0**
1st of 351 · 1.2 per 1,000 residents (347th of 351)	scored exposure $380M · 4.5 in poor condition	166th of 351 · culverts and small crossings	high or significant hazard

Land area	Seasonal homes	Peak service population	Core infrastructure index
48.3 sq mi	**1%**	**676,492**	**0.34**
8% state-owned	share of housing units	residents plus seasonal	roads, culverts, dams, coast, flood, energy

Burden index 0.53; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT	State-owned land PILOT, FY2026	PILOT per eligible acre	New growth per resident
155 acres	**$722,000**	**$4,653**	**$69,464**
0.5% of land area · FY2026	payment in lieu of taxes, cherry sheet	statewide $117 · FY2026	FY2017–2025 · 17th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.9% of Boston's general-fund spending in FY2025, down from 25.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006	FY2016	FY2025	Net of state charges, FY2025
25.5%	**13.9%**	**10.9%**	**2.8%**
$554M of $2.17B · median town 14.1%	$427M of $3.07B · median town 12.2%	$522M of $4.78B · median town 11.5%	FY2010: 17.5% · median town 10.0%

Boston's state aid did not keep pace with either price measure: FY2025 aid was 39.3% below its FY2006 aid grown by Boston-area consumer prices and 46.0% below grown by the government price index.

Gross state aid went from $554 million in FY2006 to $522 million in FY2025, –5.8% in dollars. Flag: in FY2010, $21 million of Boston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25	All fixed costs, FY2016–25	Years squeezed	Health insurance
+45.0%	**+30.6%**	**6 of 9**	**2 of 9**
$385M to $558M · all towns +54.0%	$710M to $927M · all towns +53.0%	fixed costs grew faster than allowed levy growth	years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Boston's health insurance would have been $480 million in FY2025; it was $558 million, $77.4 million above the path. Its fixed costs would have been $887 million in FY2025; it was $927 million, $40.7 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2021 (+37%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Boston came to $81.6 million, 47.1% of the $173 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$81.6M	47.1%	28.2%
Placed in the town	$210M	121.1%	42.3%
Everything placed	$225M	129.7%	45.2%

SCHOOLS

Boston's required school contribution is 3.7% of median household income, 11th highest of 351.

Chapter 70 aid, FY2026	Required local contribution
$245M	**$1.01B**
to the town's district	FY2026
Share of household income	Real aid per pupil, FY2017–26
3.7%	**–6%**
11th of 351 (1 = highest)	after inflation

Boston runs its own school district.

EXPECTED AND ACTUAL

Boston received $493 million in earmarks placed in the town and competitive grants over ten years, 31% more than the $376 million its size, need and institutions predict.

PEERS

Boston ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

No Massachusetts municipality is close to Boston in size. The peers below are the nearest on population and need and should be read loosely.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Boston this town	**43**	**$9,995**	**$157**	**$384**	**0.53**	**3.7%**
Cambridge peer	33	$6,322	$64.05	$67.01	0.22	1.7%
Quincy peer	32	$7,723	$176	$107	0.82	3.0%
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Bourne

Town · Barnstable County · 20,323 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Barnstable · Steven George Xiarhos 61% of residents

3rd Barnstable · David T. Vieira 39% of residents

Bourne is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Bourne Public Schools, the town's own district

Upper Cape Cod Regional Vocational Technical School District, vocational, shared with Falmouth, Marion, Sandwich and Wareham

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Bourne scores 30 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

305th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	31	36	26

Rank under other weightings: 274th to 321st.

Stable low: below 45 under every weighting

Bourne received less than its share of state aid on all four measures; its blended score of 30 stays between 28 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100

170th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	58	48	52

Rank under other weightings: 164th to 180th.

Near fair: between 45 and 55 under every weighting

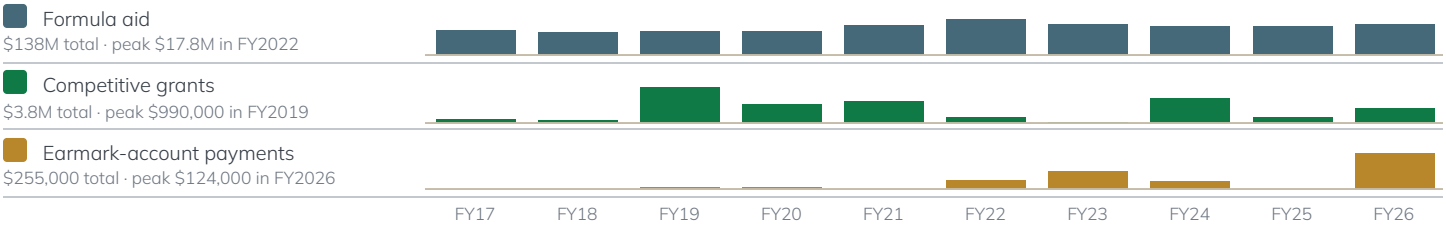
Bourne received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 51 and 55 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bourne's town government and school districts received $138 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$138M	**$3.8M**	**$255,000**
$6,777 per resident (304th of 351) · gross	$185 per resident (261st of 351)	$12.55 per resident (243rd of 351)

Competitive grants to Bourne peaked in FY2019 at $990,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.6 million, are not shown.

EARMARKS

Bourne received $5.9 million in local earmarks naming the town, $1.1 million placed in the town and $6.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$5.9M	**$1.1M**	**$6.1M**	**Not a member**
$292 per resident (4th of 351)	$55.96 per resident (151st of 351)	$298 per resident (8th of 351)	35 municipalities had none

Placed in the town: 19 clauses in eight of ten budgets; the most recent in FY2026. Every one names Bourne directly.

Names the town includes $4.8 million in clauses that name Bourne but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $4.9 million in three clauses for state facilities located in Bourne (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$150,000	"a coastal water quality and natural resource monitoring program in Buzzards bay and Vineyard sound administered by the Buzzards Bay Coalition, Inc"	Enacted names the town
FY2025	$150,000	"a coastal water quality and natural resource monitoring program in Buzzards Bay and Vineyard Sound administered by Buzzards Bay Coalition, Inc"	Enacted names the town
FY2024	$150,000	"a coastal water quality and natural resource monitoring program in Buzzards bay and Vineyard sound administered by Buzzards Bay Coalition, Inc"	Enacted names the town
FY2023	$150,000	"a coastal water quality and natural resource monitoring program in Buzzards Bay and Vineyard Sound administered by the Buzzards Bay Coalition, Inc"	Enacted names the town
FY2023	$80,000	"the Bourne police department to coordinate on police and mental health co-responders"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Bourne received 51% of its proportional share of competitive grant awards.

Local road miles **99.5** 97th of 351 · 4.9 per 1,000 residents (240th of 351)	Town-owned bridges, replacement cost **$5.7M** scored exposure $3.2M · none in poor condition	Road-stream crossings **44** 284th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **40.7 sq mi** 34% state-owned	Seasonal homes **17%** share of housing units	Peak service population **24,756** residents plus seasonal	Core infrastructure index **0.01** roads, culverts, dams, coast, flood, energy

Burden index 0.51; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **10,812 acres** 41.5% of land area · FY2026	State-owned land PILOT, FY2026 **$1.1M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$100** statewide $117 · FY2026	New growth per resident **$27,769** FY2017–2025 · 119th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.1% of Bourne's general-fund spending in FY2025, down from 18.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.1%** $8.4M of $46.4M · median town 14.1%	FY2016 **13.3%** $8.1M of $60.7M · median town 12.2%	FY2025 **11.1%** $9.9M of $88.8M · median town 11.5%	Net of state charges, FY2025 **4.6%** FY2010: 12.1% · median town 10.0%

Bourne's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $847,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bourne's state aid did not keep pace with either price measure: FY2025 aid was 24.6% below its FY2006 aid grown by Boston-area consumer prices and 33.0% below grown by the government price index.

Gross state aid went from $8.4 million in FY2006 to $9.9 million in FY2025, +17.0% in dollars. Flag: in FY2010, $1.1 million of Bourne's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+41.2%** $9.7M to $13.7M · all towns +54.0%	All fixed costs, FY2016–25 **+45.3%** $12.7M to $18.4M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bourne's health insurance would have been $12.1 million in FY2025; it was $13.7 million, $1.59 million above the path. Its fixed costs would have been $15.8 million in FY2025; it was $18.4 million, $2.58 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bourne came to $888,000, 22.2% of the $4.01 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$888,000	22.2%	28.2%
Placed in the town	$888,000	22.2%	42.3%
Everything placed	$1M	25.3%	45.2%

SCHOOLS

Bourne's required school contribution is 2.9% of median household income, 99th highest of 351.

Chapter 70 aid, FY2026 **$6.8M** to the town's district	Required local contribution **$23.6M** FY2026
Share of household income **2.9%** 99th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Bourne runs its own school district and also belongs to Upper Cape Cod; Bourne accounts for 25% of that district's foundation budget.

EXPECTED AND ACTUAL

Bourne received $6.7 million in earmarks placed in the town and competitive grants over ten years, 50% of the $13.5 million its size, need and institutions predict.

PEERS

Bourne ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bourne this town	**30**	**$6,777**	**$185**	**$55.96**	**0.51**	**2.9%**
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Mashpee peer	26	$6,045	$173	$12.51	0.72	2.8%
Westport peer	30	$6,951	$107	$52.17	0.45	3.2%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Boxborough

Town · Middlesex County · 5,496 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
37th Middlesex · Danillo A. Sena	**Middlesex and Worcester** · James B. Eldridge	**Acton-Boxborough Regional School District**, shared with Acton	Metropolitan Area Planning Council

FAIRNESS INDEX

Boxborough scores 34 on the Fairness Index for all state aid and 35 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

267th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	49	28	26

Rank under other weightings: 247th to 281st.

Stable low: below 45 under every weighting

Boxborough received less than its share of state aid on all four measures; its blended score of 34 stays between 30 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

35 / 100

247th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	49	31	26

Rank under other weightings: 232nd to 256th.

Stable low: below 45 under every weighting

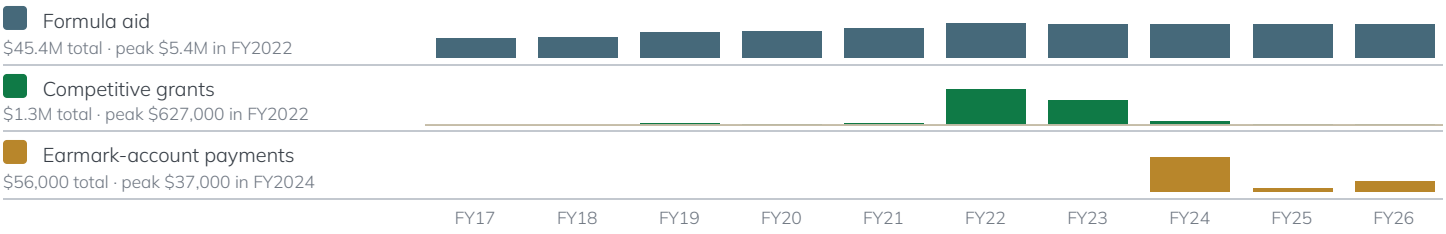
Boxborough received less than its share of discretionary money on all four measures; its blended score of 35 stays between 31 and 39 under every weighting tested.

STATE MONEY, FY2017–FY2026

Boxborough's town government and school districts received $45.4 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$45.4M	**$1.3M**	**$56,000**
$8,257 per resident (243rd of 351) · gross	$231 per resident (235th of 351)	$10.20 per resident (258th of 351)

Competitive grants to Boxborough peaked in FY2022 at $627,000, 49% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.3 million, are not shown.

EARMARKS

Boxborough received $240,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$240,000	**$240,000**	**$240,000**	**Not a member**
$43.67 per resident (165th of 351)	$43.67 per resident (187th of 351)	$43.67 per resident (189th of 351)	35 municipalities had none

Placed in the town: four clauses in three of ten budgets; the most recent in FY2026. Every one names Boxborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"the town of Boxborough for the purchase and installation of an emergency generator at the Boxborough public library"	Enacted names the town
FY2024	$50,000 (split two ways)	"the Acton-Boxborough regional school district to establish a welcome center"	Enacted names the town
FY2018	$50,000	"the historic restoration of the Levi Wetherbee farm located on Middle road in the town of Boxborough"	Enacted names the town
FY2024	$40,000	"the design and construction of improvements at Liberty field in the town of Boxborough"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Boxborough received 36% of its proportional share of competitive grant awards.

Local road miles **33.7** 318th of 351 · 6.1 per 1,000 residents (186th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **57** 236th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **10.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,496** residents plus seasonal	Core infrastructure index **0.13** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **20 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$5,650** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$289** statewide $117 · FY2026	New growth per resident **$42,972** FY2017–2025 · 50th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

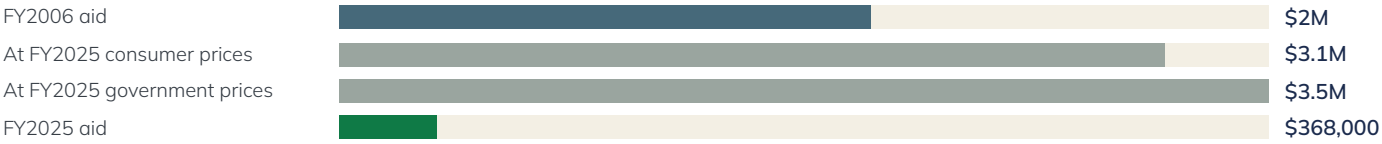
State aid covered 1.3% of Boxborough's general-fund spending in FY2025, down from 12.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.0%** $2M of $16.7M · median town 14.1%	FY2016 **2.9%** $544,000 of $19M · median town 12.2%	FY2025 **1.3%** $368,000 of $28.2M · median town 11.5%	Net of state charges, FY2025 **1.0%** FY2010: 11.0% · median town 10.0%

Boxborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Boxborough's state aid did not keep pace with either price measure: FY2025 aid was 88.2% below its FY2006 aid grown by Boston-area consumer prices and 89.5% below grown by the government price index.



Gross state aid went from $2 million in FY2006 to $368,000 in FY2025, –81.7% in dollars. Flag: in FY2010, $284,000 of Boxborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+69.0%** $610,000 to $1M · all towns +54.0%	All fixed costs, FY2016–25 **+90.8%** $1.4M to $2.7M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Boxborough's health insurance would have been $762,000 in FY2025; it was $1.03 million, $269,000 above the path. Its fixed costs would have been $1.77 million in FY2025; it was $2.71 million, $935,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Boxborough came to $140,000, 33.3% of the $421,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$140,000	33.3%	28.2%
Placed in the town	$140,000	33.3%	42.3%
Everything placed	$140,000	33.3%	45.2%

SCHOOLS

Boxborough's required school contribution is 2.8% of median household income, 122nd highest of 351.

Chapter 70 aid, FY2026 **$3.4M** attributed to the town	Required local contribution **$9.3M** FY2026
Share of household income **2.8%** 122nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+32%** after inflation

Boxborough has no school district of its own. Its pupils attend Boxborough and Acton-Boxborough; Boxborough accounts for 100% and 17% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Boxborough received $1.5 million in earmarks placed in the town and competitive grants over ten years, 48% of the $3.1 million its size, need and institutions predict.

PEERS

Boxborough ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Boxborough this town	**34**	**$8,257**	**$231**	**$43.67**	**0.36**	**2.8%**
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Oak Bluffs peer	51	$8,440	$2,606	$93.40	3.64	3.0%
Edgartown peer · lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%
Wenham peer	29	$6,869	$147	$69.20	0.80	2.5%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Boxford

Town · Essex County · 8,208 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Essex · Adrianne Pusateri Ramos
67% of residents
18th Essex · Tram T. Nguyen 33% of residents
Boxford is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Boxford Public Schools, the town's own district
Masconomet Regional School District, shared with Middleton and Topsfield
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Boxford scores 39 on the Fairness Index for all state aid and 32 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100
217th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	59	30	31

Rank under other weightings: 176th to 248th.

Stable low: below 45 under every weighting

Boxford received less than its share of state aid on three of four measures; its blended score of 39 stays between 34 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

32 / 100
261st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	48	29	22

Rank under other weightings: 244th to 269th.

Stable low: below 45 under every weighting

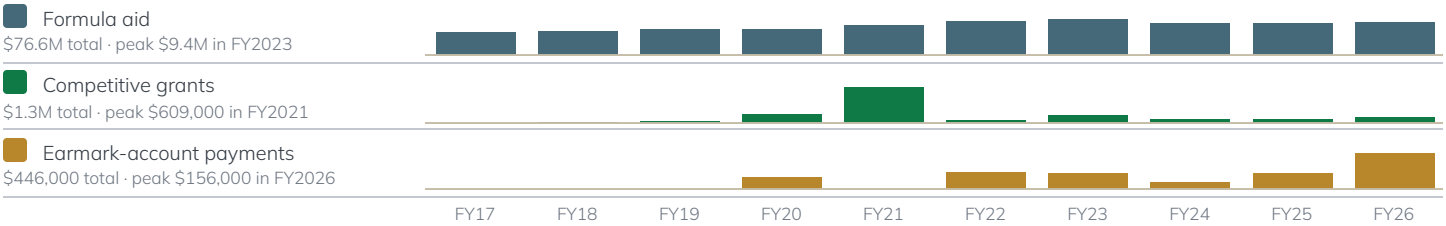
Boxford received less than its share of discretionary money on all four measures; its blended score of 32 stays between 28 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Boxford's town government and school districts received $76.6 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$76.6M	$1.3M	$446,000
$9,338 per resident (203rd of 351) · gross	$156 per resident (285th of 351)	$54.34 per resident (68th of 351)

Competitive grants to Boxford peaked in FY2021 at $609,000, 48% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.2 million, are not shown.

EARMARKS

Boxford received $614,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$614,000	$614,000	$614,000	Not a member
$74.78 per resident (78th of 351)	$74.78 per resident (105th of 351)	$74.78 per resident (112th of 351)	35 municipalities had none

Placed in the town: 16 clauses in seven of ten budgets; the most recent in FY2026. Every one names Boxford directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the repair or replacement of culverts in the town of Boxford"	Enacted names the town
FY2026	$75,000	"the town of Boxford for any costs related to the replacement of a department of public works tractor"	Enacted names the town
FY2026	$75,000	"the town of Boxford for the procurement of vehicle stabilizers and UTV for the Boxford fire department"	Enacted names the town
FY2022	$75,000	"the town of Boxford for the construction of a combined community and senior center"	Enacted names the town
FY2023	$50,000	"the town of Boxford to drill a new well to serve the town hall, library and police station"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Boxford received 46% of its proportional share of competitive grant awards.

Local road miles **89.7** 123rd of 351 · 10.9 per 1,000 residents (94th of 351)	Town-owned bridges, replacement cost **$4.3M** scored exposure $723,000 · none in poor condition	Road-stream crossings **136** 56th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **23.6 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,208** residents plus seasonal	Core infrastructure index **0.55** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,074 acres** 7.1% of land area · FY2026	State-owned land PILOT, FY2026 **$275,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$256** statewide $117 · FY2026	New growth per resident **$18,838** FY2017–2025 · 206th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.6% of Boxford's general-fund spending in FY2025, down from 10.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.4%** $2.5M of $24M · median town 14.1%	FY2016 **7.3%** $2.3M of $31.4M · median town 12.2%	FY2025 **6.6%** $2.9M of $43.2M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 8.4% · median town 10.0%

Boxford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Boxford's state aid did not keep pace with either price measure: FY2025 aid was 26.3% below its FY2006 aid grown by Boston-area consumer prices and 34.5% below grown by the government price index.

Gross state aid went from $2.5 million in FY2006 to $2.9 million in FY2025, +14.3% in dollars. Flag: in FY2010, $131,000 of Boxford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.3%** $620,000 to $882,000 · all towns +54.0%	All fixed costs, FY2016–25 **+46.9%** $2.1M to $3.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Boxford's health insurance would have been $774,000 in FY2025; it was $882,000, $108,000 above the path. Its fixed costs would have been $2.61 million in FY2025; it was $3.07 million, $460,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Boxford came to $442,000, 168.5% of the $262,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$442,000	168.5%	28.2%
Placed in the town	$442,000	168.5%	42.3%
Everything placed	$442,000	168.5%	45.2%

SCHOOLS

Boxford's required school contribution is 2.6% of median household income, 197th highest of 351.

Chapter 70 aid, FY2026 **$4.5M** to the town's district	Required local contribution **$14.3M** FY2026
Share of household income **2.6%** 197th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+0%** after inflation

Boxford runs its own district for some grades and belongs to Masconomet and Essex North Shore for others; Boxford accounts for 38% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Boxford received $1.9 million in earmarks placed in the town and competitive grants over ten years, 91% of the $2.1 million its size, need and institutions predict.

PEERS

Boxford ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Boxford this town	**39**	**$9,338**	**$156**	**$74.78**	**0.46**	**2.6%**
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Boylston

Town · Worcester County · 4,948 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
12th Worcester · Meghan K. Kilcoyne

STATE SENATE
First Worcester · Robyn K. Kennedy

SCHOOL DISTRICTS
Berlin-Boylston Regional School District, shared with Berlin

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Boylston scores 32 on the Fairness Index for all state aid and 23 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

293rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	38	29	28

Rank under other weightings: 282nd to 299th.

Stable low: below 45 under every weighting

Boylston received less than its share of state aid on all four measures; its blended score of 32 stays between 30 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

23 / 100

303rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	30	18	21

Rank under other weightings: 293rd to 306th.

Stable low: below 45 under every weighting

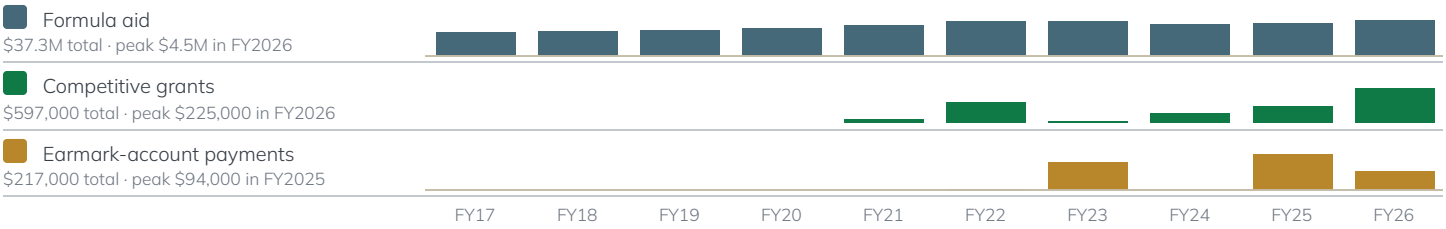
Boylston received less than its share of discretionary money on all four measures; its blended score of 23 stays between 21 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

Boylston's town government and school districts received $37.3 million in formula aid and $597,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$37.3M	**$597,000**	**$217,000**
$7,545 per resident (273rd of 351) · gross	$121 per resident (311th of 351)	$43.80 per resident (96th of 351)

Competitive grants to Boylston peaked in FY2026 at $225,000, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.1 million, are not shown.

EARMARKS

Boylston received $340,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$340,000	**$340,000**	**$340,000**	**Not a member**
$68.71 per resident (88th of 351)	$68.71 per resident (117th of 351)	$68.71 per resident (124th of 351)	35 municipalities had none

Placed in the town: seven clauses in five of ten budgets; the most recent in FY2026. Every one names Boylston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$50,000	"the town of Boylston as compensation for hosting a municipal police training academy"	Enacted names the town
FY2025	$50,000	"Boylston for roof replacement at the Boylston elementary school"	Enacted names the town
FY2025	$50,000	"the town of Boylston as compensation for hosting a municipal police training academy"	Enacted names the town
FY2024	$50,000	"the town of Boylston as compensation for hosting a municipal police training academy"	Enacted names the town
FY2023	$50,000	"the town of Boylston as compensation for hosting a municipal police training academy"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Boylston received 67% of its proportional share of competitive grant awards.

Local road miles **40.0** 292nd of 351 · 8.1 per 1,000 residents (136th of 351)	Town-owned bridges, replacement cost **$1.4M** scored exposure $285,000 · none in poor condition	Road-stream crossings **62** 223rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.1 sq mi** 22% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,948** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.67; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$57,802** FY2017–2025 · 28th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

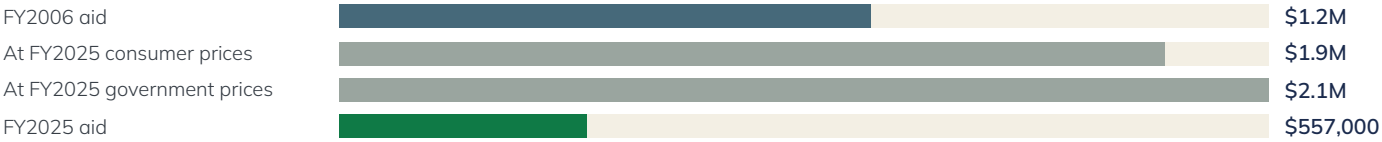
State aid covered 2.5% of Boylston's general-fund spending in FY2025, down from 11.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.5%** $1.2M of $10.4M · median town 14.1%	FY2016 **6.2%** $869,000 of $14M · median town 12.2%	FY2025 **2.5%** $557,000 of $22.6M · median town 11.5%	Net of state charges, FY2025 **2.2%** FY2010: 10.9% · median town 10.0%

Boylston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Boylston's state aid did not keep pace with either price measure: FY2025 aid was 69.9% below its FY2006 aid grown by Boston-area consumer prices and 73.3% below grown by the government price index.



Gross state aid went from $1.2 million in FY2006 to $557,000 in FY2025, –53.4% in dollars. Flag: in FY2010, $475,000 of Boylston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–10.5%** $858,000 to $767,000 · all towns +54.0%	All fixed costs, FY2016–25 **+40.5%** $1.4M to $2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Boylston's health insurance would have been $1.07 million in FY2025; it was $767,000, $304,000 below the path. Its fixed costs would have been $1.78 million in FY2025; it was $2.01 million, $223,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Boylston's reported health insurance fell from $858,000 in FY2016 to $767,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$290,000	no increase	28.2%
Placed in the town	$290,000	no increase	42.3%
Everything placed	$290,000	no increase	45.2%

SCHOOLS

Boylston's required school contribution is 2.6% of median household income, 206th highest of 351.

Chapter 70 aid, FY2026 **$1.6M** to the town's district	Required local contribution **$7.1M** FY2026
Share of household income **2.6%** 206th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Boylston runs its own district for some grades and belongs to Berlin-Boylston for others; Boylston accounts for 60% of that district's foundation budget.

EXPECTED AND ACTUAL

Boylston received $1.4 million in earmarks placed in the town and competitive grants over ten years, 68% of the $2 million its size, need and institutions predict.

PEERS

Boylston ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Boylston this town	**32**	**$7,545**	**$121**	**$68.71**	**0.67**	**2.6%**
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Essex peer	32	$7,261	$477	$208	0.75	2.6%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Hinsdale lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Braintree

City · Norfolk County · 38,899 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Norfolk · Mark J. Cusack

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr. 75% of residents

Norfolk and Plymouth · John F. Keenan 25% of residents

SCHOOL DISTRICTS

Braintree Public Schools, the city's own district

Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Canton, Dedham, Holbrook, Milton, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Braintree scores 39 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

224th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	44	36	41

Rank under other weightings: 203rd to 239th.

Stable low: below 45 under every weighting

Braintree received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

252nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	38	31	36

Rank under other weightings: 244th to 257th.

Stable low: below 45 under every weighting

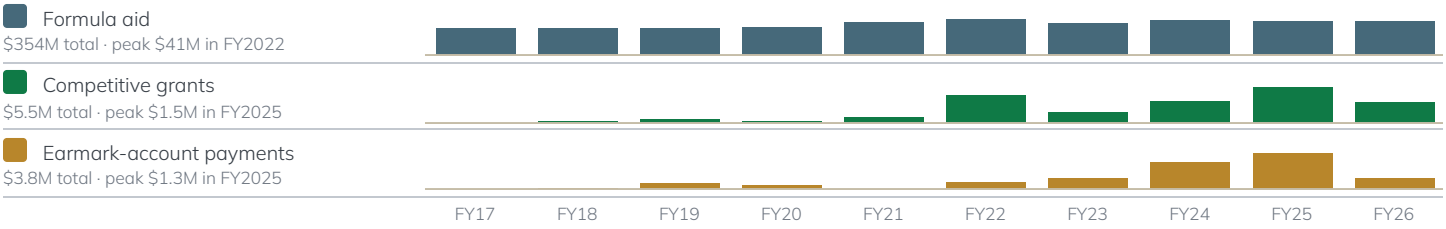
Braintree received less than its share of discretionary money on all four measures; its blended score of 34 stays between 32 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Braintree's town government and school districts received $354 million in formula aid and $5.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$354M	$5.5M	$3.8M
$9,109 per resident (216th of 351) · gross	$142 per resident (296th of 351)	$98.08 per resident (25th of 351)

Competitive grants to Braintree peaked in FY2025 at $1.5 million, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $43.5 million, are not shown.

EARMARKS

Braintree received $4.5 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$4.5M	$4.5M	$4.5M	Not a member
$117 per resident (30th of 351)	$117 per resident (50th of 351)	$117 per resident (54th of 351)	35 municipalities had none

Placed in the town: 47 clauses in ten of ten budgets; the most recent in FY2026. Every one names Braintree directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$250,000	"mental health services in Braintree public schools"	Enacted names the town
FY2026	$200,000	"One Life at a Time, Inc., located in the city known as the town of Braintree, for the facilitation of access to sober living programs and job…"	Enacted names the town
FY2025	$200,000	"One Life at a Time, Inc., located in the city known as the town of Braintree, for the facilitation of access to sober living programs and job…"	Enacted names the town
FY2025	$200,000	"mental health services in Braintree public schools"	Enacted names the town
FY2023	$200,000	"One Life at a Time, Inc., located in the city known as the town of Braintree, for the facilitation of access to sober living programs and job…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Braintree received 55% of its proportional share of competitive grant awards.

Local road miles **104.6** 80th of 351 · 2.7 per 1,000 residents (327th of 351)	Town-owned bridges, replacement cost **$20.1M** scored exposure $7.5M · one in poor condition	Road-stream crossings **106** 107th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **13.8 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **38,899** residents plus seasonal	Core infrastructure index **1.59** roads, culverts, dams, coast, flood, energy

Burden index 0.55; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **46 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,167** statewide $117 · FY2026	New growth per resident **$12,596** FY2017–2025 · 282nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.5% of Braintree's general-fund spending in FY2025, up from 13.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.5%** $12.2M of $90.8M · median town 14.1%	FY2016 **17.5%** $21.1M of $120M · median town 12.2%	FY2025 **15.5%** $28.8M of $186M · median town 11.5%	Net of state charges, FY2025 **12.7%** FY2010: 11.6% · median town 10.0%

Braintree's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $995,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Braintree's state aid kept pace with both price measures: FY2025 aid was 52.0% above its FY2006 aid grown by Boston-area consumer prices and 35.1% above grown by the government price index.

Gross state aid went from $12.2 million in FY2006 to $28.8 million in FY2025, +135.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+30.6%** $18.2M to $23.8M · all towns +54.0%	All fixed costs, FY2016–25 **+116.3%** $17.4M to $37.7M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Braintree's health insurance would have been $22.8 million in FY2025; it was $23.8 million, $1.04 million above the path. Its fixed costs would have been $21.8 million in FY2025; it was $37.7 million, $16 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2022 (−44%) and FY2024 (+159%); health insurance changed by more than 30% in one year in FY2024 (+32%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2017, FY2022 and FY2023 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Braintree came to $3.8 million, 68.9% of the $5.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.8M	68.9%	28.2%
Placed in the town	$3.8M	68.9%	42.3%
Everything placed	$3.8M	68.9%	45.2%

SCHOOLS

Braintree's required school contribution is 3.4% of median household income, 20th highest of 351.

Chapter 70 aid, FY2026 **$22.9M** to the town's district	Required local contribution **$60.6M** FY2026
Share of household income **3.4%** 20th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Braintree runs its own school district and also belongs to Blue Hills and Norfolk County; Braintree accounts for 17% and 8% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Braintree received $11.7 million in earmarks placed in the town and competitive grants over ten years, 87% of the $13.5 million its size, need and institutions predict.

PEERS

Braintree ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Braintree this town	**39**	**$9,109**	**$142**	**$117**	**0.55**	**3.4%**
Easton peer	30	$7,249	$236	$53.96	1.08	3.3%
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Billerica peer	39	$9,140	$64.58	$21.52	0.29	2.7%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Holden lowest in class of 30	49	$13,276	$103	$15.70	0.39	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Brewster

Town · Barnstable County · 10,420 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Barnstable · Christopher Richard Flanagan

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Brewster Public Schools, the town's own district
Nauset Regional School District, shared with Eastham, Orleans and Wellfleet
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Brewster scores 35 on the Fairness Index for all state aid and 77 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

256th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	37	38	36

Rank under other weightings: 235th to 283rd.

Stable low: below 45 under every weighting

Brewster received less than its share of state aid on all four measures; its blended score of 35 stays between 34 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

77 / 100

85th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
75	80	73	79

Rank under other weightings: 81st to 88th.

Stable high: above 55 under every weighting

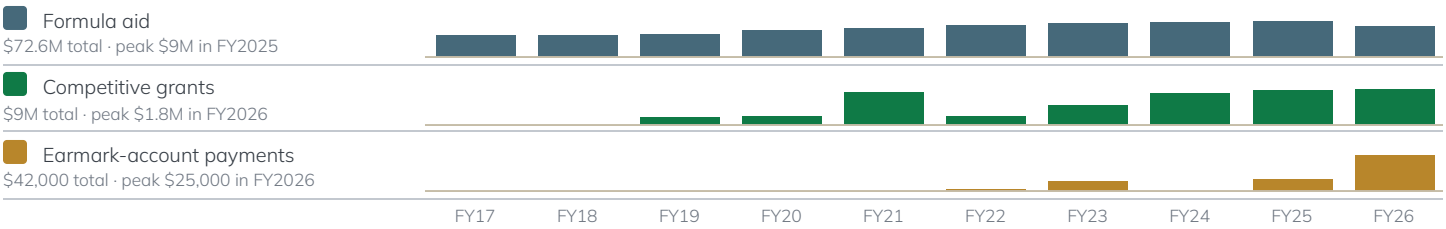
Brewster received more than its share of discretionary money on all four measures; its blended score of 77 stays between 75 and 78 under every weighting tested.

STATE MONEY, FY2017–FY2026

Brewster's town government and school districts received $72.6 million in formula aid and $9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$72.6M	**$9M**	**$42,000**
$6,965 per resident (291st of 351) · gross	$860 per resident (85th of 351)	$4.02 per resident (300th of 351)

Competitive grants to Brewster were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $27 million, are not shown.

EARMARKS

Brewster received $50,000 in local earmarks naming the town, $300,000 placed in the town and $300,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	**$300,000**	**$300,000**	**Not a member**
$4.80 per resident (307th of 351)	$28.79 per resident (247th of 351)	$28.79 per resident (248th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2026. $50,000 came in clauses that name Brewster; the other $250,000 went to organizations based in Brewster, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000	"Latham Centers, Inc. to address urgent technology upgrades to security, programs and support services for children and adult residents with complex..."	Enacted recipient based here
FY2024	$100,000	"Latham Centers, Inc. for upgrades to its food service facilities"	Enacted recipient based here
FY2025	$25,000	"Latham Centers, Inc., to address urgent technology upgrades that will improve security, programs and support services for children and adult..."	Enacted recipient based here
FY2024	$25,000	"the Brewster Ponds Coalition, Incorporated. for the installation of enhanced phosphorus removal alternative innovative septic systems, not currently..."	Enacted names the town
FY2022	$25,000	"the Cape Cod Museum of Natural History in the town of Brewster for repairs and improvements to the mobile classroom facility"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Brewster received 2.03 times its proportional share of competitive grant awards.

Local road miles **56.3** 225th of 351 · 5.4 per 1,000 residents (214th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **24** 323rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.9 sq mi** 13% state-owned	Seasonal homes **42%** share of housing units	Peak service population **17,775** residents plus seasonal	Core infrastructure index **0.41** roads, culverts, dams, coast, flood, energy

Burden index 2.03; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,970 acres** 13.4% of land area · FY2026	State-owned land PILOT, FY2026 **$602,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$305** statewide $117 · FY2026	New growth per resident **$40,272** FY2017–2025 · 57th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.2% of Brewster's general-fund spending in FY2025, down from 7.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.2%** $2.3M of $31.6M · median town 14.1%	FY2016 **4.2%** $1.8M of $41.7M · median town 12.2%	FY2025 **4.2%** $2.6M of $61.5M · median town 11.5%	Net of state charges, FY2025 **3.1%** FY2010: 5.8% · median town 10.0%

Brewster's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Brewster's state aid did not keep pace with either price measure: FY2025 aid was 26.3% below its FY2006 aid grown by Boston-area consumer prices and 34.5% below grown by the government price index.

Gross state aid went from $2.3 million in FY2006 to $2.6 million in FY2025, +14.4% in dollars. Flag: in FY2010, $545,000 of Brewster's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.9%** $3M to $4M · all towns +54.0%	All fixed costs, FY2016–25 **+37.7%** $5.7M to $7.9M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Brewster's health insurance would have been $3.76 million in FY2025; it was $4.00 million, $243,000 above the path. Its fixed costs would have been $7.13 million in FY2025; it was $7.86 million, $731,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Brewster came to $50,000, 5.0% of the $992,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	5.0%	28.2%
Placed in the town	$175,000	17.6%	42.3%
Everything placed	$175,000	17.6%	45.2%

SCHOOLS

Brewster's required school contribution is 2.6% of median household income, 179th highest of 351.

Chapter 70 aid, FY2026 **$3.6M** to the town's district	Required local contribution **$12.7M** FY2026
Share of household income **2.6%** 179th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Brewster runs its own district for some grades and belongs to Nauset and Cape Cod for others; Brewster accounts for 45% and 9% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Brewster received $9.9 million in earmarks placed in the town and competitive grants over ten years, about the $9.7 million its size, need and institutions predict.

PEERS

Brewster ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Brewster this town	**35**	**$6,965**	**$860**	**$28.79**	**2.03**	**2.6%**
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Mashpee peer	26	$6,045	$173	$12.51	0.72	2.8%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Harwich peer	24	$5,502	$93.86	$4.93	0.59	2.8%
Essex best in class of 30	32	$7,261	$477	$208	0.75	2.6%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Bridgewater

City · Plymouth County · 28,471 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Plymouth · Dennis C. Gallagher

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr.

SCHOOL DISTRICTS

Bridgewater-Raynham Regional School District, shared with Raynham
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Dighton, Freetown, Middleborough, Raynham, Rehoboth and Taunton

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Bridgewater scores 39 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

221st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	40	39	39

Rank under other weightings: 207th to 240th.

Stable low: below 45 under every weighting

Bridgewater received less than its share of state aid on all four measures; its blended score of 39 stays between 39 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100

223rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	40	41	39

Rank under other weightings: 211th to 230th.

Stable low: below 45 under every weighting

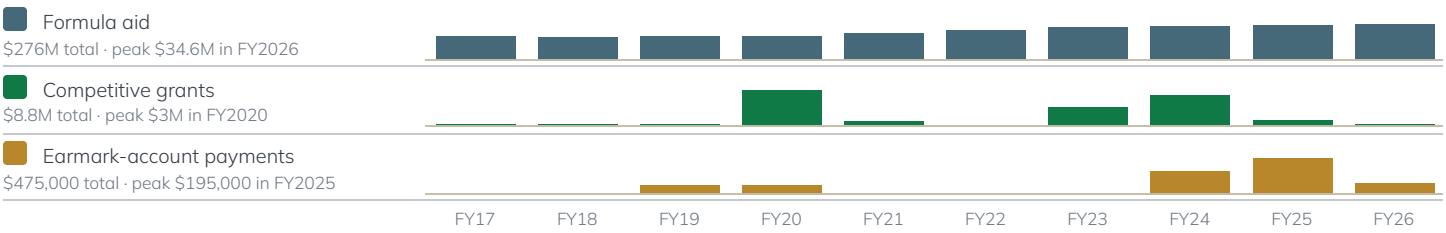
Bridgewater received less than its share of discretionary money on all four measures; its blended score of 40 stays between 40 and 40 under every weighting tested.

STATE MONEY, FY2017–FY2026

Bridgewater's town government and school districts received $276 million in formula aid and $8.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$276M	**$8.8M**	**$475,000**
$9,702 per resident (189th of 351) · gross	$309 per resident (204th of 351)	$16.67 per resident (222nd of 351)

Competitive grants to Bridgewater peaked in FY2020 at $3 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.3 million, are not shown.

EARMARKS

Bridgewater received $420,000 in local earmarks naming the town, $620,000 placed in the town and $820,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$420,000	**$620,000**	**$820,000**	**Not a member**
$14.75 per resident (286th of 351)	$21.78 per resident (271st of 351)	$28.80 per resident (247th of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. $420,000 came in clauses that name Bridgewater; the other $200,000 went to organizations based in Bridgewater, some of which serve a wider area.

Everything placed, the third measure, adds $200,000 in two clauses for state facilities located in Bridgewater (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the Racial Equity and Justice Institute for the expansion of professional development and consultive support throughout higher education campuses in…"	Enacted recipient based here
FY2023	$100,000	"the Racial Equity and Justice Institute for the expansion of professional development and consultive support throughout higher education campuses in…"	Enacted recipient based here
FY2024	$70,000	"emergency roadway repairs in the city known as the town of Bridgewater"	Enacted names the town
FY2026	$60,000	"the town of Bridgewater for building a pavilion and other improvements associated with a pavilion at the Town river landing"	Enacted names the town
FY2025	$50,000	"the purpose of emergency roadway repairs in Bridgewater"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Bridgewater received 1.08 times its proportional share of competitive grant awards.

Local road miles **114.1** 69th of 351 · 4.0 per 1,000 residents (277th of 351)	Town-owned bridges, replacement cost **$22.3M** scored exposure $7.4M · 0.5 in poor condition	Road-stream crossings **86** 152nd of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **27.2 sq mi** 10% state-owned	Seasonal homes **0%** share of housing units	Peak service population **28,471** residents plus seasonal	Core infrastructure index **1.60** roads, culverts, dams, coast, flood, energy

Burden index 1.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,852 acres** 16.4% of land area · FY2026	State-owned land PILOT, FY2026 **$768,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$269** statewide $117 · FY2026	New growth per resident **$22,392** FY2017–2025 · 158th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.5% of Bridgewater's general-fund spending in FY2025, down from 13.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.2%** $4.7M of $35.7M · median town 14.1%	FY2016 **9.4%** $4.7M of $50.1M · median town 12.2%	FY2025 **7.5%** $5.6M of $73.8M · median town 11.5%	Net of state charges, FY2025 **6.9%** FY2010: 10.5% · median town 10.0%

Bridgewater's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $20.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Bridgewater's state aid did not keep pace with either price measure: FY2025 aid was 23.6% below its FY2006 aid grown by Boston-area consumer prices and 32.1% below grown by the government price index.

Gross state aid went from $4.7 million in FY2006 to $5.6 million in FY2025, +18.4% in dollars. Flag: in FY2010, $815,000 of Bridgewater's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.9%** $2.4M to $3.8M · all towns +54.0%	All fixed costs, FY2016–25 **+79.7%** $5.4M to $9.7M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Bridgewater's health insurance would have been $2.98 million in FY2025; it was $3.76 million, $786,000 above the path. Its fixed costs would have been $6.74 million in FY2025; it was $9.70 million, $2.96 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Bridgewater came to $360,000, 26.1% of the $1.38 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$360,000	26.1%	28.2%
Placed in the town	$560,000	40.6%	42.3%
Everything placed	$660,000	47.9%	45.2%

SCHOOLS

Bridgewater's required school contribution is 3.0% of median household income, 68th highest of 351.

Chapter 70 aid, FY2026 **$23M** attributed to the town	Required local contribution **$31.2M** FY2026
Share of household income **3.0%** 68th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Bridgewater has no school district of its own. Its pupils attend Bridgewater, Bridgewater-Raynham and Bristol Plymouth; Bridgewater accounts for 100%, 62% and 13% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Bridgewater received $9.4 million in earmarks placed in the town and competitive grants over ten years, 41% more than the $6.7 million its size, need and institutions predict.

PEERS

Bridgewater ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Bridgewater this town	**39**	**$9,702**	**$309**	**$21.78**	**1.08**	**3.0%**
North Attleborough peer	44	$10,543	$156	$39.34	1.28	2.7%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
East Longmeadow peer	42	$11,619	$224	$13.70	0.72	3.2%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Brimfield

Town · Hampden County · 3,705 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Brimfield Public Schools, the town's own district

Tantasqua Regional School District, shared with Brookfield, Holland, Sturbridge and Wales

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Brimfield scores 50 on the Fairness Index for all state aid and 43 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

124th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	54	44	51

Rank under other weightings: 118th to 132nd.

Near fair: between 45 and 55 under every weighting

Brimfield received less than its share of state aid on two of four measures; its blended score of 50 stays between 48 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

43 / 100

212th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	48	34	45

Rank under other weightings: 205th to 217th.

Weighting-dependent: the range crosses the 45–55 band

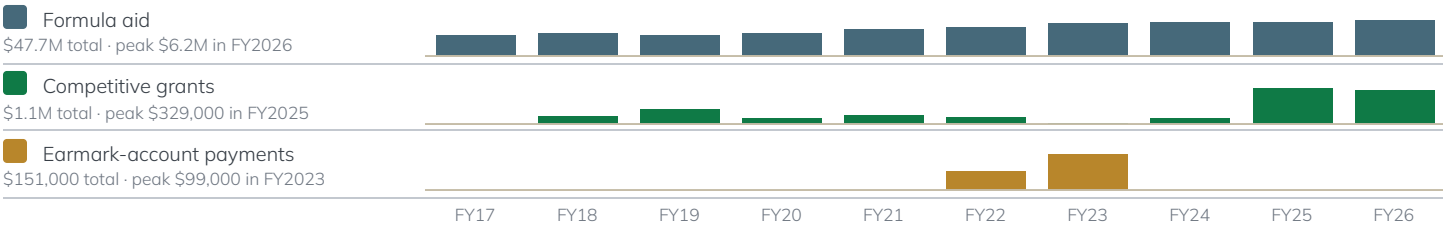
Brimfield received less than its share of discretionary money on all four measures; its blended score of 43 stays between 41 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Brimfield's town government and school districts received $47.7 million in formula aid and $1.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$47.7M	**$1.1M**	**$151,000**
$12,874 per resident (114th of 351) · gross	$303 per resident (208th of 351)	$40.66 per resident (108th of 351)

Competitive grants to Brimfield peaked in FY2025 at $329,000, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.3 million, are not shown.

EARMARKS

Brimfield received $240,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$240,000	**$240,000**	**$240,000**	**Not a member**
$64.78 per resident (99th of 351)	$64.78 per resident (128th of 351)	$64.78 per resident (134th of 351)	35 municipalities had none

Placed in the town: five clauses in five of ten budgets; the most recent in FY2025. Every one names Brimfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"improvements to the town common in the town of Brimfield"	Enacted names the town
FY2024	$50,000	"web design and infrastructure improvement for the Brimfield antique show through the Chamber of Central Mass South"	Enacted names the town
FY2023	$50,000	"the town of Brimfield for the upgrade and improvement of recreational trails"	Enacted names the town
FY2025	$25,000	"web design and infrastructure improvement for the Brimfield antique show through the Chamber of Central Mass South"	Enacted names the town
FY2018	$15,000	"the Friends of the Brimfield Windmill, Inc. for costs related to the restoration of the Brimfield windmill in the town of Brimfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Brimfield received 46% of its proportional share of competitive grant awards.

Local road miles **64.0** 205th of 351 · 17.3 per 1,000 residents (65th of 351)	Town-owned bridges, replacement cost **$19.3M** scored exposure $3.8M · none in poor condition	Road-stream crossings **194** 13th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **34.8 sq mi** 10% state-owned	Seasonal homes **6%** share of housing units	Peak service population **3,976** residents plus seasonal	Core infrastructure index **0.29** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,019 acres** 9.1% of land area · FY2026	State-owned land PILOT, FY2026 **$153,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$75.53** statewide $117 · FY2026	New growth per resident **$12,571** FY2017–2025 · 284th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 20.5% of Brimfield's general-fund spending in FY2025, down from 20.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.7%** $1.6M of $7.7M · median town 14.1%	FY2016 **19.2%** $1.7M of $8.9M · median town 12.2%	FY2025 **20.5%** $2.5M of $12.2M · median town 11.5%	Net of state charges, FY2025 **19.4%** FY2010: 19.7% · median town 10.0%

Brimfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Brimfield's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 1.2% above its FY2006 aid grown by Boston-area consumer prices and 10.1% below grown by the government price index.

Gross state aid went from $1.6 million in FY2006 to $2.5 million in FY2025, +56.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.4%** $229,000 to $304,000 · all towns +54.0%	All fixed costs, FY2016–25 **+82.1%** $642,000 to $1.2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Brimfield's health insurance would have been $286,000 in FY2025; it was $304,000, $17,000 above the path. Its fixed costs would have been $802,000 in FY2025; it was $1.17 million, $367,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Brimfield came to $240,000, 3.2 times the $74,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$240,000	3.2 times	28.2%
Placed in the town	$240,000	3.2 times	42.3%
Everything placed	$240,000	3.2 times	45.2%

SCHOOLS

Brimfield's required school contribution is 2.7% of median household income, 154th highest of 351.

Chapter 70 aid, FY2026 **$3.7M** to the town's district	Required local contribution **$4.3M** FY2026
Share of household income **2.7%** 154th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+20%** after inflation

Brimfield runs its own district for some grades and belongs to Tantasqua for others; Brimfield accounts for 17% of that district's foundation budget.

EXPECTED AND ACTUAL

Brimfield received $1.4 million in earmarks placed in the town and competitive grants over ten years, 57% of the $2.4 million its size, need and institutions predict.

PEERS

Brimfield ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Brimfield this town	**50**	**$12,874**	**$303**	**$64.78**	**0.46**	**2.7%**
Williamsburg peer	41	$9,541	$578	$3.71	1.40	2.2%
Granby peer	49	$12,582	$104	$26.32	0.31	2.4%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Hampden peer	31	$7,912	$119	$42.46	1.10	3.0%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
Conway lowest in class of 30	48	$12,799	$405	$0	0.68	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Brockton

City · Plymouth County · 105,386 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Plymouth · Michelle M. DuBois 43% of residents
11th Plymouth · Rita A. Mendes 40% of residents
9th Plymouth · Bridget Plouffe 17% of residents

Brockton is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

Brockton Public Schools, the city's own district
Southeastern Regional Vocational Technical School District, vocational, shared with East Bridgewater, Easton, Foxborough, Mansfield, Norton, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Brockton scores 72 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

72 / 100

9th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	66	69	78

Rank under other weightings: 7th to 11th.

Stable high: above 55 under every weighting

Brockton received more than its share of state aid on all four measures; its blended score of 72 stays between 69 and 75 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

188th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	39	56	55

Rank under other weightings: 167th to 202nd.

Near fair: between 45 and 55 under every weighting

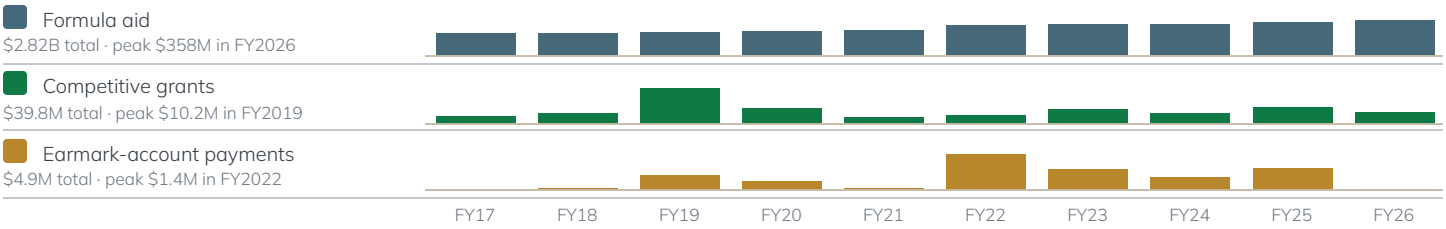
Brockton received more than its share of discretionary money on three of four measures; its blended score of 50 stays between 47 and 53 under every weighting tested.

STATE MONEY, FY2017–FY2026

Brockton's town government and school districts received $2.82 billion in formula aid and $39.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.82B	$39.8M	$4.9M
$26,796 per resident (8th of 351) · gross	$378 per resident (180th of 351)	$46.06 per resident (86th of 351)

Competitive grants to Brockton peaked in FY2019 at $10.2 million, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $102 million, are not shown.

EARMARKS

Brockton received $6 million in local earmarks naming the town, $7.4 million placed in the town and $7.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$6M	$7.4M	$7.4M	Not a member
$57.34 per resident (123rd of 351)	$70.10 per resident (112th of 351)	$70.10 per resident (120th of 351)	35 municipalities had none

Placed in the town: 105 clauses in ten of ten budgets; the most recent in FY2026. $6 million came in clauses that name Brockton; the other $1.3 million went to organizations based in Brockton, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$550,000	"paving at Brockton High School in the city of Brockton"	Enacted names the town
FY2018	$250,000	"the Brockton public school district"	Enacted names the town
FY2021	$175,000	"the Plymouth County Children's Advocacy Center"	Enacted recipient based here
FY2020	$175,000	"the Plymouth County Children's Advocacy Center"	Enacted recipient based here
FY2019	$175,000	"the Plymouth County Children's Advocacy Center for child victims of sexual abuse and assault"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Brockton received 1.28 times its proportional share of competitive grant awards.

Local road miles **246.0** 7th of 351 · 2.3 per 1,000 residents (332nd of 351)	Town-owned bridges, replacement cost **$43.3M** scored exposure $13.4M · three in poor condition	Road-stream crossings **178** 22nd of 351 · culverts and small crossings	Town-owned hazard dams **8** high or significant hazard
Land area **21.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **105,838** residents plus seasonal	Core infrastructure index **0.74** roads, culverts, dams, coast, flood, energy

Burden index 1.28; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **10 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$2,634** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$257** statewide $117 · FY2026	New growth per resident **$8,017** FY2017–2025 · 337th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 51.0% of Brockton's general-fund spending in FY2025, up from 37.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **37.5%** $138M of $367M · median town 14.1%	FY2016 **54.6%** $194M of $355M · median town 12.2%	FY2025 **51.0%** $290M of $570M · median town 11.5%	Net of state charges, FY2025 **44.4%** FY2010: 51.0% · median town 10.0%

Brockton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $18.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Brockton's state aid kept pace with both price measures: FY2025 aid was 35.9% above its FY2006 aid grown by Boston-area consumer prices and 20.8% above grown by the government price index.

Gross state aid went from $138 million in FY2006 to $290 million in FY2025, +110.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+159.7%** $55.4M to $144M · all towns +54.0%	All fixed costs, FY2016–25 **+91.5%** $79.2M to $152M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Brockton's health insurance would have been $69.2 million in FY2025; it was $144 million, $74.7 million above the path. Its fixed costs would have been $98.9 million in FY2025; it was $152 million, $52.7 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (+84%), FY2024 (–38%) and FY2025 (+92%); fixed costs changed by more than 30% in one year in FY2024 (–36%) and FY2025 (+76%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Brockton came to $5.3 million, 6.0% of the $88.5 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$5.3M	6.0%	28.2%
Placed in the town	$6.6M	7.5%	42.3%
Everything placed	$6.6M	7.5%	45.2%

SCHOOLS

Brockton's required school contribution is 2.3% of median household income, 274th highest of 351.

Chapter 70 aid, FY2026 **$302M** to the town's district	Required local contribution **$67.1M** FY2026
Share of household income **2.3%** 274th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Brockton runs its own school district and also belongs to Southeastern; Brockton accounts for 63% of that district's foundation budget.

EXPECTED AND ACTUAL

Brockton received $51.8 million in earmarks placed in the town and competitive grants over ten years, 7% more than the $48.6 million its size, need and institutions predict.

PEERS

Brockton ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Brockton this town	**72**	**$26,796**	**$378**	**$70.10**	**1.28**	**2.3%**
Lowell peer	70	$24,024	$384	$66.99	0.82	2.3%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Brookfield

Town · Worcester County · 3,460 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Brookfield Public Schools, the town's own district

Tantasqua Regional School District, shared with Brimfield, Holland, Sturbridge and Wales

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Brookfield scores 55 on the Fairness Index for all state aid and 87 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

82nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	48	55	60

Rank under other weightings: 65th to 98th.

Weighting-dependent: the range crosses the 45–55 band

Brookfield received more than its share of state aid on three of four measures; its blended score of 55 stays between 53 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

87 / 100

51st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
87	82	88	88

Rank under other weightings: 46th to 59th.

Stable high: above 55 under every weighting

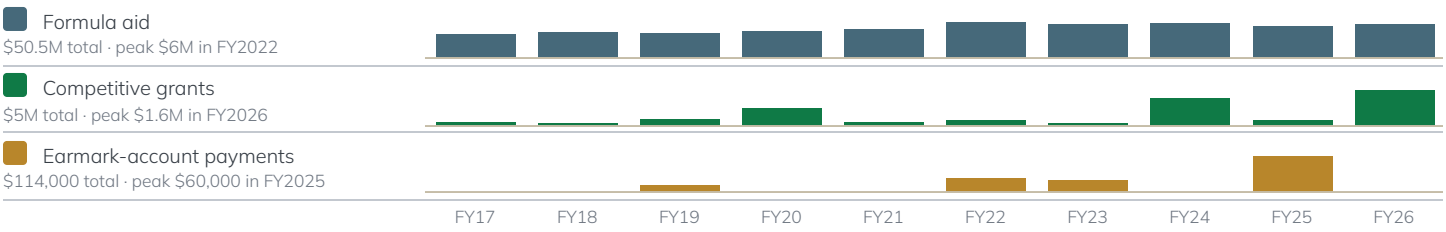
Brookfield received more than its share of discretionary money on all four measures; its blended score of 87 stays between 85 and 88 under every weighting tested.

STATE MONEY, FY2017–FY2026

Brookfield's town government and school districts received $50.5 million in formula aid and $5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$50.5M	$5M	$114,000
$14,600 per resident (81st of 351) · gross	$1,459 per resident (58th of 351)	$33.09 per resident (137th of 351)

Competitive grants to Brookfield peaked in FY2026 at $1.6 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.5 million, are not shown.

EARMARKS

Brookfield received $112,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$112,000	$112,000	$112,000	Not a member
$32.37 per resident (216th of 351)	$32.37 per resident (228th of 351)	$32.37 per resident (229th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2025. Every one names Brookfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$60,000	"the purpose of the removal and replacement of failing insulation and drop ceiling tiles at the Brookfield police department"	Enacted names the town
FY2023	$20,000	"the town of Brookfield for the town's three hundred and fiftieth anniversary"	Enacted names the town
FY2022	$20,000	"the police department in the town of Brookfield"	Enacted names the town
FY2019	$12,000	"the town of Brookfield for repairs to the Brookfield fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Brookfield received 2.11 times its proportional share of competitive grant awards.

Local road miles **36.3** 305th of 351 · 10.5 per 1,000 residents (99th of 351)	Town-owned bridges, replacement cost **$7.7M** scored exposure $873,000 · none in poor condition	Road-stream crossings **59** 232nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **15.5 sq mi** 25% state-owned	Seasonal homes **2%** share of housing units	Peak service population **3,549** residents plus seasonal	Core infrastructure index **5.22** roads, culverts, dams, coast, flood, energy

Burden index 2.11; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,536 acres** 25.5% of land area · FY2026	State-owned land PILOT, FY2026 **$171,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$67.30** statewide $117 · FY2026	New growth per resident **$14,186** FY2017–2025 · 265th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 28.9% of Brookfield's general-fund spending in FY2025, down from 35.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **35.1%** $2.2M of $6.4M · median town 14.1%	FY2016 **31.3%** $2.4M of $7.7M · median town 12.2%	FY2025 **28.9%** $3.1M of $10.8M · median town 11.5%	Net of state charges, FY2025 **27.3%** FY2010: 32.3% · median town 10.0%

Brookfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Brookfield's state aid did not keep pace with either price measure: FY2025 aid was 9.6% below its FY2006 aid grown by Boston-area consumer prices and 19.6% below grown by the government price index.

Gross state aid went from $2.2 million in FY2006 to $3.1 million in FY2025, +40.2% in dollars. Flag: in FY2010, $331,000 of Brookfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+64.7%** $438,000 to $721,000 · all towns +54.0%	All fixed costs, FY2016–25 **+84.4%** $778,000 to $1.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Brookfield's health insurance would have been $547,000 in FY2025; it was $721,000, $174,000 above the path. Its fixed costs would have been $972,000 in FY2025; it was $1.44 million, $463,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Brookfield came to $112,000, 39.5% of the $283,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$112,000	39.5%	28.2%
Placed in the town	$112,000	39.5%	42.3%
Everything placed	$112,000	39.5%	45.2%

SCHOOLS

Brookfield's required school contribution is 2.4% of median household income, 242nd highest of 351.

Chapter 70 aid, FY2026 **$4M** to the town's district	Required local contribution **$3M** FY2026
Share of household income **2.4%** 242nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+12%** after inflation

Brookfield runs its own district for some grades and belongs to Tantasqua for others; Brookfield accounts for 14% of that district's foundation budget.

EXPECTED AND ACTUAL

Brookfield received $5.2 million in earmarks placed in the town and competitive grants over ten years, 65% more than the $3.1 million its size, need and institutions predict.

PEERS

Brookfield ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Brookfield this town	**55**	**$14,600**	**$1,459**	**$32.37**	**2.11**	**2.4%**
Huntington peer	63	$18,322	$2,918	$33.78	0.25	2.5%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
North Brookfield peer	56	$15,678	$1,128	$7.35	0.87	2.9%
Cheshire peer	55	$14,188	$1,187	$49.75	2.39	2.8%
West Brookfield peer	56	$14,082	$1,069	$66.08	1.84	2.6%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Brookline

Town · Norfolk County · 63,266 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

15th Norfolk · Tommy Vitolo 72% of residents
12th Middlesex · Greg Schwartz 16% of residents
17th Suffolk · Kevin G. Honan 6% of residents
10th Suffolk · William F. MacGregor 6% of residents

Brookline is split among four House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk and Middlesex · Cynthia Stone Creem

SCHOOL DISTRICTS

Brookline Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Brookline scores 21 on the Fairness Index for all state aid and 14 for discretionary money. Fifty is a fair share.

ALL STATE AID

21 / 100

350th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	25	24	15

Rank under other weightings: 347th to 351st.

Stable low: below 45 under every weighting

Brookline received less than its share of state aid on all four measures; its blended score of 21 stays between 19 and 23 under every weighting tested.

DISCRETIONARY MONEY ONLY

14 / 100

337th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
12	16	17	9

Rank under other weightings: 334th to 342nd.

Stable low: below 45 under every weighting

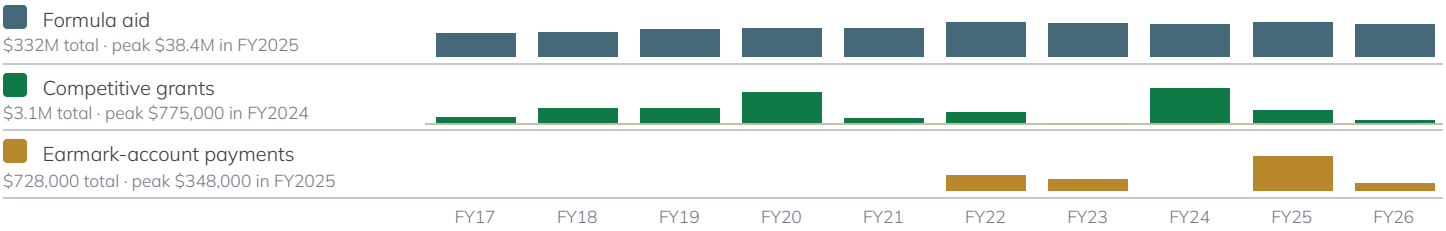
Brookline received less than its share of discretionary money on all four measures; its blended score of 14 stays between 12 and 15 under every weighting tested.

STATE MONEY, FY2017–FY2026

Brookline's town government and school districts received $332 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$332M	**$3.1M**	**$728,000**
$5,242 per resident (341st of 351) · gross	$48.41 per resident (347th of 351)	$11.51 per resident (250th of 351)

Competitive grants to Brookline peaked in FY2024 at $775,000, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $63.3 million, are not shown.

EARMARKS

Brookline received $4.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$4.4M	**$4.4M**	**$4.4M**	**Not a member**
$69.97 per resident (84th of 351)	$69.97 per resident (113th of 351)	$69.97 per resident (121st of 351)	35 municipalities had none

Placed in the town: 55 clauses in ten of ten budgets; the most recent in FY2026. Every one names Brookline directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$350,000	"the Brookline Center for Community Mental Health to expand its Bridge for Resilient Youth in Transition (BRYT) program to schools across the…"	Enacted names the town
FY2026	$250,000	"the Brookline Community Mental Health Center, Inc., to expand the healthy lives program"	Enacted names the town
FY2024	$250,000	"the Brookline Community Mental Health Center, Inc. to expand the healthy lives program"	Enacted names the town
FY2023	$250,000	"the Brookline Community Mental Health Center, Inc. in the town of Brookline to expand the healthy lives program"	Enacted names the town
FY2022	$250,000	"the Brookline Community Mental Health Center, Inc. to expand the Healthy Lives program"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Brookline received 36% of its proportional share of competitive grant awards.

Local road miles **93.4** 113th of 351 · 1.5 per 1,000 residents (343rd of 351)	Town-owned bridges, replacement cost **$16.4M** scored exposure $4.7M · none in poor condition	Road-stream crossings **30** 315th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **6.8 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **63,945** residents plus seasonal	Core infrastructure index **1.28** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$37,126** FY2017–2025 · 71st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.8% of Brookline's general-fund spending in FY2025, down from 10.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.6%** $18M of $170M · median town 14.1%	FY2016 **8.1%** $18.8M of $234M · median town 12.2%	FY2025 **6.8%** $25M of $365M · median town 11.5%	Net of state charges, FY2025 **4.7%** FY2010: 5.9% · median town 10.0%

Brookline's state aid did not keep pace with either price measure: FY2025 aid was 10.7% below its FY2006 aid grown by Boston-area consumer prices and 20.6% below grown by the government price index.

Gross state aid went from $18 million in FY2006 to $25 million in FY2025, +38.5% in dollars. Flag: in FY2010, $3.3 million of Brookline's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.5%** $30.2M to $43.7M · all towns +54.0%	All fixed costs, FY2016–25 **+63.6%** $54.6M to $89.4M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Brookline's health insurance would have been $37.7 million in FY2025; it was $43.7 million, $5.94 million above the path. Its fixed costs would have been $68.2 million in FY2025; it was $89.4 million, $21.2 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Brookline came to $4 million, 29.4% of the $13.5 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4M	29.4%	28.2%
Placed in the town	$4M	29.4%	42.3%
Everything placed	$4M	29.4%	45.2%

SCHOOLS

Brookline's required school contribution is 2.0% of median household income, 308th highest of 351.

Chapter 70 aid, FY2026 **$17.8M** to the town's district	Required local contribution **$78.6M** FY2026
Share of household income **2.0%** 308th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+13%** after inflation

Brookline runs its own school district and also belongs to Norfolk County; Brookline accounts for 0% of that district's foundation budget.

EXPECTED AND ACTUAL

Brookline received $12.2 million in earmarks placed in the town and competitive grants over ten years, 54% of the $22.8 million its size, need and institutions predict.

PEERS

Brookline ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Brookline this town	**21**	**$5,242**	**$48.41**	**$69.97**	**0.36**	**2.0%**
Watertown peer	28	$6,072	$161	$39.70	0.91	1.8%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Buckland

Town · Franklin County · 2,036 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mohawk Trail Regional School District, shared with Ashfield, Charlemont, Colrain, Hawley, Heath, Plainfield and Shelburne

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Colrain, Conway, Deerfield, Erving, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Buckland scores 59 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

53rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	54	68	51

Rank under other weightings: 33rd to 85th.

Weighting-dependent: the range crosses the 45–55 band

Buckland received more than its share of state aid on all four measures; its blended score of 59 stays between 55 and 63 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

9th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	96	97	96

Rank under other weightings: 4th to 15th.

Stable high: above 55 under every weighting

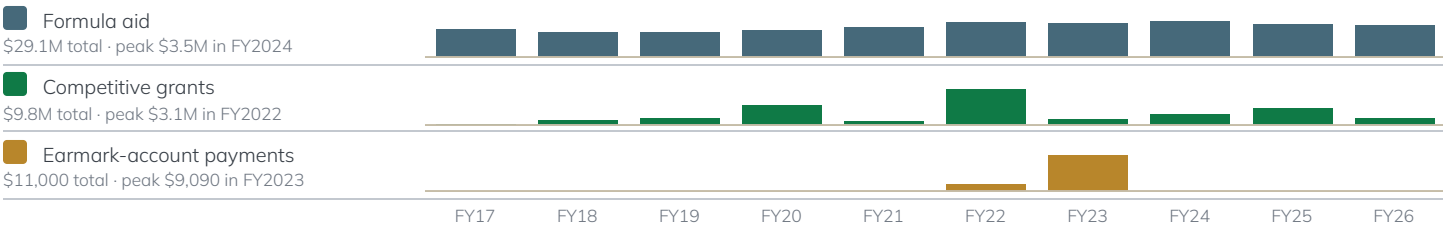
Buckland received more than its share of discretionary money on all four measures; its blended score of 97 stays between 97 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Buckland's town government and school districts received $29.1 million in formula aid and $9.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$29.1M	**$9.8M**	**$11,000**
$14,272 per resident (88th of 351) · gross	$4,838 per resident (16th of 351)	$5.32 per resident (282nd of 351)

Competitive grants to Buckland peaked in FY2022 at $3.1 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.4 million, are not shown.

EARMARKS

Buckland received $112,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$112,000	**$112,000**	**$112,000**	**Not a member**
$55.26 per resident (129th of 351)	$55.26 per resident (153rd of 351)	$55.26 per resident (159th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Buckland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the Wilder Homestead property in the town of Buckland to support restoration efforts"	Enacted names the town
FY2023	$50,000	"Red Gate Farm Education Center in the town of Buckland"	Enacted names the town
FY2020	$12,000 (split two ways)	"The Senior Center Consortium representing the towns of Ashfield, Buckland, and Shelburne and the western Franklin County region for the design and…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Buckland received 6.12 times its proportional share of competitive grant awards.

Local road miles **42.5** 280th of 351 · 20.9 per 1,000 residents (56th of 351)	Town-owned bridges, replacement cost **$8.1M** scored exposure $1.2M · one in poor condition	Road-stream crossings **72** 191st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.7 sq mi** 2% state-owned	Seasonal homes **4%** share of housing units	Peak service population **2,129** residents plus seasonal	Core infrastructure index **5.51** roads, culverts, dams, coast, flood, energy

Burden index 6.12; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **152 acres** 1.2% of land area · FY2026	State-owned land PILOT, FY2026 **$4,208** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$27.68** statewide $117 · FY2026	New growth per resident **$10,276** FY2017–2025 · 318th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.1% of Buckland's general-fund spending in FY2025, down from 9.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.4%** $291,000 of $3.1M · median town 14.1%	FY2016 **7.9%** $349,000 of $4.4M · median town 12.2%	FY2025 **7.1%** $434,000 of $6.1M · median town 11.5%	Net of state charges, FY2025 **7.0%** FY2010: 7.8% · median town 10.0%

Buckland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Buckland's state aid did not keep pace with either price measure: FY2025 aid was 3.9% below its FY2006 aid grown by Boston-area consumer prices and 14.6% below grown by the government price index.

Gross state aid went from $291,000 in FY2006 to $434,000 in FY2025, +49.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–2.3%** $136,000 to $133,000 · all towns +54.0%	All fixed costs, FY2016–25 **+16.8%** $238,000 to $277,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Buckland's health insurance would have been $170,000 in FY2025; it was $133,000, $37,000 below the path. Its fixed costs would have been $297,000 in FY2025; it was $277,000, $19,000 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+35%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Buckland's reported health insurance fell from $136,000 in FY2016 to $133,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$112,000	no increase	28.2%
Placed in the town	$112,000	no increase	42.3%
Everything placed	$112,000	no increase	45.2%

SCHOOLS

Buckland's required school contribution is 2.3% of median household income, 272nd highest of 351.

Chapter 70 aid, FY2026 **$1.8M** attributed to the town	Required local contribution **$1.7M** FY2026
Share of household income **2.3%** 272nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–1%** after inflation

Buckland has no school district of its own. Its pupils attend Mohawk Trail and Franklin County; Buckland accounts for 21% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Buckland received $10.2 million in earmarks placed in the town and competitive grants over ten years, 2.1 times the $4.9 million its size, need and institutions predict.

PEERS

Buckland ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Buckland this town	**59**	**$14,272**	**$4,838**	**$55.26**	**6.12**	**2.3%**
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Huntington peer	63	$18,322	$2,918	$33.78	0.25	2.5%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
Cheshire peer	55	$14,188	$1,187	$49.75	2.39	2.8%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Burlington

Town · Middlesex County · 26,274 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

21st Middlesex · Kenneth I. Gordon

STATE SENATE

Fourth Middlesex · Cindy F. Friedman

SCHOOL DISTRICTS

Burlington Public Schools, the town's own district

Shawsheen Valley Regional Vocational Technical School District, vocational, shared with Bedford, Billerica, Tewksbury and Wilmington

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Burlington scores 35 on the Fairness Index for all state aid and 51 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

265th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	44	27	38

Rank under other weightings: 236th to 290th.

Stable low: below 45 under every weighting

Burlington received less than its share of state aid on all four measures; its blended score of 35 stays between 31 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

51 / 100

180th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	64	34	58

Rank under other weightings: 153rd to 201st.

Weighting-dependent: the range crosses the 45–55 band

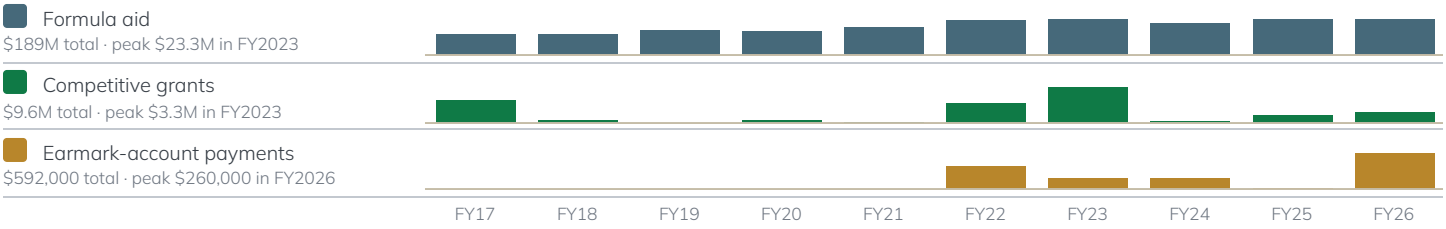
Burlington received more than its share of discretionary money on two of four measures; its blended score of 51 stays between 45 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Burlington's town government and school districts received $189 million in formula aid and $9.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$189M	$9.6M	$592,000
$7,194 per resident (283rd of 351) · gross	$367 per resident (182nd of 351)	$22.53 per resident (188th of 351)

Competitive grants to Burlington peaked in FY2023 at $3.3 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $58.5 million, are not shown.

EARMARKS

Burlington received $1.2 million in local earmarks naming the town, $2.7 million placed in the town and $2.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$2.7M	$2.7M	Not a member
$44.97 per resident (162nd of 351)	$102 per resident (65th of 351)	$102 per resident (74th of 351)	35 municipalities had none

Placed in the town: 22 clauses in eight of ten budgets; the most recent in FY2026. $1.2 million came in clauses that name Burlington; the other $1.5 million went to organizations based in Burlington, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$500,000	"establish a psychiatry residency training program at a tertiary academic medical center located in the town of Burlington to support training of…"	Enacted names the town
FY2026	$200,000	"the Massachusetts Down Syndrome Congress, Inc"	Enacted recipient based here
FY2026	$200,000	"the town of Burlington to replace the aging asphalt walkways on the town common with updated ADA-compliant concrete walkways"	Enacted names the town
FY2025	$200,000	"the Massachusetts Down Syndrome Congress, Inc"	Enacted recipient based here
FY2024	$200,000	"the Massachusetts Down Syndrome Congress, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Burlington received 46% of its proportional share of competitive grant awards.

Local road miles **102.5** 89th of 351 · 3.9 per 1,000 residents (280th of 351)	Town-owned bridges, replacement cost **$2.6M** scored exposure $354,000 · none in poor condition	Road-stream crossings **87** 148th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **11.7 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **26,420** residents plus seasonal	Core infrastructure index **0.93** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$50,935** FY2017–2025 · 36th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.2% of Burlington's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $7.4M of $80.3M · median town 14.1%	FY2016 **6.9%** $8.8M of $127M · median town 12.2%	FY2025 **7.2%** $13.5M of $188M · median town 11.5%	Net of state charges, FY2025 **6.6%** FY2010: 7.7% · median town 10.0%

Burlington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $633,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Burlington's state aid kept pace with both price measures: FY2025 aid was 18.3% above its FY2006 aid grown by Boston-area consumer prices and 5.1% above grown by the government price index.

Gross state aid went from $7.4 million in FY2006 to $13.5 million in FY2025, +83.4% in dollars. Flag: in FY2010, $259,000 of Burlington's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+80.4%** $14.6M to $26.3M · all towns +54.0%	All fixed costs, FY2016–25 **+77.2%** $24.7M to $43.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Burlington's health insurance would have been $18.2 million in FY2025; it was $26.3 million, $8.11 million above the path. Its fixed costs would have been $30.8 million in FY2025; it was $43.7 million, $12.9 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Burlington came to $970,000, 8.3% of the $11.7 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$970,000	8.3%	28.2%
Placed in the town	$2.3M	19.3%	42.3%
Everything placed	$2.3M	19.3%	45.2%

SCHOOLS

Burlington's required school contribution is 3.0% of median household income, 89th highest of 351.

Chapter 70 aid, FY2026 **$11.2M** to the town's district	Required local contribution **$43.1M** FY2026
Share of household income **3.0%** 89th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+26%** after inflation

Burlington runs its own school district and also belongs to Shawsheen Valley; Burlington accounts for 9% of that district's foundation budget.

EXPECTED AND ACTUAL

Burlington received $12.4 million in earmarks placed in the town and competitive grants over ten years, 92% of the $13.5 million its size, need and institutions predict.

PEERS

Burlington ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Burlington this town	**35**	**$7,194**	**$367**	**$102**	**0.46**	**3.0%**
Canton peer	29	$6,511	$84.68	$52.89	0.29	2.9%
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Cambridge

City · Middlesex County · 118,796 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

25th Middlesex · Marjorie C. Decker 36% of residents
26th Middlesex · Mike Connolly 29% of residents
29th Middlesex · Steven Owens 19% of residents
2nd Suffolk · Daniel J. Ryan 8% of residents
24th Middlesex · David M. Rogers 4% of residents
18th Suffolk · Michael J. Moran 3% of residents

Cambridge is split among six House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Suffolk · Sal N. DiDomenico 63% of residents
Second Middlesex · Patricia D. Jehlen 24% of residents
Suffolk and Middlesex · William N. Brownsberger 12% of residents

SCHOOL DISTRICTS

Cambridge Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Cambridge scores 33 on the Fairness Index for all state aid and 12 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

277th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	28	42	39

Rank under other weightings: 229th to 326th.

Stable low: below 45 under every weighting

Cambridge received less than its share of state aid on all four measures; its blended score of 33 stays between 29 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

12 / 100

343rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
10	12	8	18

Rank under other weightings: 335th to 348th.

Stable low: below 45 under every weighting

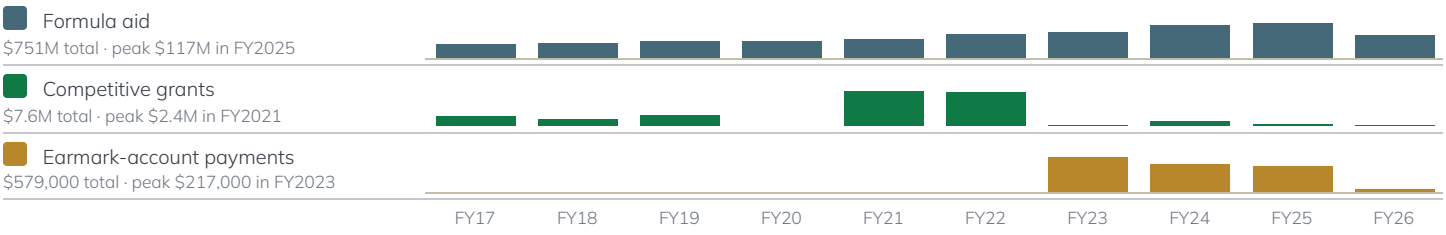
Cambridge received less than its share of discretionary money on all four measures; its blended score of 12 stays between 10 and 14 under every weighting tested.

STATE MONEY, FY2017–FY2026

Cambridge's town government and school districts received $751 million in formula aid and $7.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$751M	$7.6M	$579,000
$6,322 per resident (326th of 351) · gross	$64.05 per resident (343rd of 351)	$4.87 per resident (288th of 351)

Competitive grants to Cambridge peaked in FY2021 at $2.4 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $245 million, are not shown.

EARMARKS

Cambridge received $4.7 million in local earmarks naming the town, $8 million placed in the town and $8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.7M	$8M	$8M	Not a member
$39.57 per resident (191st of 351)	$67.01 per resident (119th of 351)	$67.01 per resident (126th of 351)	35 municipalities had none

Placed in the town: 83 clauses in ten of ten budgets; the most recent in FY2026. $4.7 million came in clauses that name Cambridge; the other $3.3 million went to organizations based in Cambridge, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$1M (split three ways)	"the hazardous materials response team in the cities of Cambridge, Everett and Boston"	Enacted names the town
FY2026	$500,000	"the HBCU Kickoff Classic Weekend at Harvard University to support venue infrastructure, logistics, community engagement, and marketing for the August…"	Enacted recipient based here
FY2026	$475,000	"the Forsyth Institute's center for children's oral health to expand its Forsyth kids programming focused on children and adolescents and to explore…"	Enacted recipient based here
FY2025	$475,000	"the Forsyth Institute's Center for Children's Oral Health to expand its ForsythKids programming focused on children and adolescents and to explore…"	Enacted recipient based here
FY2024	$475,000	"the Forsyth Institute's Center for Children's Oral Health to expand its ForsythKids programming focused on children and adolescents and explore the…"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Cambridge received 22% of its proportional share of competitive grant awards.

Local road miles **120.8** 61st of 351 · 1.0 per 1,000 residents (351st of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **18** 330th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **6.4 sq mi** 5% state-owned	Seasonal homes **2%** share of housing units	Peak service population **121,402** residents plus seasonal	Core infrastructure index **0.94** roads, culverts, dams, coast, flood, energy

Burden index 0.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$126,376** FY2017–2025 · 8th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.2% of Cambridge's general-fund spending in FY2025, down from 12.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.1%** $42.8M of $355M · median town 14.1%	FY2016 **7.2%** $32.6M of $454M · median town 12.2%	FY2025 **6.2%** $51M of $816M · median town 11.5%	Net of state charges, FY2025 **2.1%** FY2010: 3.3% · median town 10.0%

Cambridge's state aid did not keep pace with either price measure: FY2025 aid was 23.3% below its FY2006 aid grown by Boston-area consumer prices and 31.8% below grown by the government price index.

Gross state aid went from $42.8 million in FY2006 to $51 million in FY2025, +19.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+55.8%** $63M to $98.2M · all towns +54.0%	All fixed costs, FY2016–25 **+88.6%** $52.6M to $99.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Cambridge's health insurance would have been $78.7 million in FY2025; it was $98.2 million, $19.5 million above the path. Its fixed costs would have been $65.6 million in FY2025; it was $99.2 million, $33.5 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2021 (+31%) and FY2023 (+47%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2017, FY2018, FY2019, FY2020 and FY2022 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Cambridge came to $4.2 million, 12.1% of the $35.2 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.2M	12.1%	28.2%
Placed in the town	$6.4M	18.3%	42.3%
Everything placed	$6.4M	18.3%	45.2%

SCHOOLS

Cambridge's required school contribution is 1.7% of median household income, 329th highest of 351.

Chapter 70 aid, FY2026 **$22.7M** to the town's district	Required local contribution **$107M** FY2026
Share of household income **1.7%** 329th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+19%** after inflation

Cambridge runs its own school district.

EXPECTED AND ACTUAL

Cambridge received $24.3 million in earmarks placed in the town and competitive grants over ten years, 40% of the $60 million its size, need and institutions predict.

PEERS

Cambridge ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Cambridge this town	**33**	**$6,322**	**$64.05**	**$67.01**	**0.22**	**1.7%**
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Brookline peer	21	$5,242	$48.41	$69.97	0.36	2.0%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Watertown peer	28	$6,072	$161	$39.70	0.91	1.8%
Boston best in class of 30	43	$9,995	$157	$384	0.53	3.7%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Canton

Town · Norfolk County · 24,748 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Norfolk · William C. Galvin

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Canton Public Schools, the town's own district

Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Dedham, Holbrook, Milton, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Canton scores 29 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

313th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	36	24	33

Rank under other weightings: 292nd to 334th.

Stable low: below 45 under every weighting

Canton received less than its share of state aid on all four measures; its blended score of 29 stays between 26 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

329th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
15	22	11	20

Rank under other weightings: 317th to 333rd.

Stable low: below 45 under every weighting

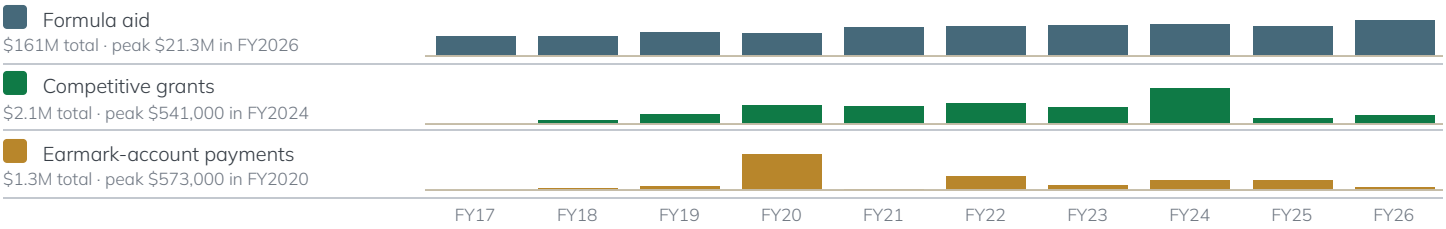
Canton received less than its share of discretionary money on all four measures; its blended score of 17 stays between 14 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Canton's town government and school districts received $161 million in formula aid and $2.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$161M	**$2.1M**	**$1.3M**
$6,511 per resident (315th of 351) · gross	$84.68 per resident (335th of 351)	$53.89 per resident (70th of 351)

Competitive grants to Canton peaked in FY2024 at $541,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18.8 million, are not shown.

EARMARKS

Canton received $1.3 million in local earmarks naming the town, $1.3 million placed in the town and $33.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	**$1.3M**	**$33.3M**	**Not a member**
$52.89 per resident (140th of 351)	$52.89 per resident (162nd of 351)	$1,345 per resident (1st of 351)	35 municipalities had none

Placed in the town: 22 clauses in eight of ten budgets; the most recent in FY2026. Every one names Canton directly.

Everything placed, the third measure, adds $32 million in clauses for the continued operation of the Pappas Rehabilitation Hospital for Children, a state-run hospital in Canton.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$500,000	"the reconstruction of the Metropolis rink in Canton"	Enacted names the town
FY2026	$100,000	"the replacement of the boardwalk at Ponkapoag pond in the town of Canton"	Enacted names the town
FY2019	$100,000	"the restoration of the David Tilden House in the town of Canton"	Enacted names the town
FY2026	$65,000 (split two ways)	"the for the purchase of new cardiac monitors for the fire department in the town of Westport"	Enacted names the town
FY2026	$50,000 (split two ways)	"the Irish Cultural Centre of Greater Boston for the restoration and improvements of the cultural centre in Canton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Canton received 29% of its proportional share of competitive grant awards.

Local road miles **95.7** 104th of 351 · 3.9 per 1,000 residents (283rd of 351)	Town-owned bridges, replacement cost **$16.9M** scored exposure $5M · two in poor condition	Road-stream crossings **85** 154th of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **18.7 sq mi** 15% state-owned	Seasonal homes **0%** share of housing units	Peak service population **24,831** residents plus seasonal	Core infrastructure index **0.82** roads, culverts, dams, coast, flood, energy

Burden index 0.29; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **520 acres** 4.3% of land area · FY2026	State-owned land PILOT, FY2026 **$68,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$131** statewide $117 · FY2026	New growth per resident **$36,102** FY2017–2025 · 77th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.2% of Canton's general-fund spending in FY2025, up from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $5.8M of $69.9M · median town 14.1%	FY2016 **9.9%** $7.9M of $79.7M · median town 12.2%	FY2025 **9.2%** $12M of $130M · median town 11.5%	Net of state charges, FY2025 **8.1%** FY2010: 8.1% · median town 10.0%

Canton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $344,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Canton's state aid kept pace with both price measures: FY2025 aid was 32.3% above its FY2006 aid grown by Boston-area consumer prices and 17.6% above grown by the government price index.

Gross state aid went from $5.8 million in FY2006 to $12 million in FY2025, +105.2% in dollars. Flag: in FY2010, $493,000 of Canton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+36.9%** $14.1M to $19.3M · all towns +54.0%	All fixed costs, FY2016–25 **+49.9%** $16.8M to $25.2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Canton's health insurance would have been $17.6 million in FY2025; it was $19.3 million, $1.69 million above the path. Its fixed costs would have been $21 million in FY2025; it was $25.2 million, $4.21 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2019 (+34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Canton came to $1.1 million, 20.3% of the $5.19 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	20.3%	28.2%
Placed in the town	$1.1M	20.3%	42.3%
Everything placed	$2M	39.1%	45.2%

SCHOOLS

Canton's required school contribution is 2.9% of median household income, 103rd highest of 351.

Chapter 70 aid, FY2026 **$10M** to the town's district	Required local contribution **$39.9M** FY2026
Share of household income **2.9%** 103rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+28%** after inflation

Canton runs its own school district and also belongs to Blue Hills and Norfolk County; Canton accounts for 10% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Canton received $3.9 million in earmarks placed in the town and competitive grants over ten years, 39% of the $9.9 million its size, need and institutions predict.

PEERS

Canton ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Canton this town	**29**	**$6,511**	**$84.68**	**$52.89**	**0.29**	**2.9%**
Burlington peer	35	$7,194	$367	$102	0.46	3.0%
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

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REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Carlisle

Town · Middlesex County · 5,239 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Middlesex · Simon Cataldo

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Carlisle Public Schools, the town's own district

Concord-Carlisle Regional School District, shared with Concord

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Carlisle scores 35 on the Fairness Index for all state aid and 41 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

261st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	58	26	23

Rank under other weightings: 220th to 298th.

Stable low: below 45 under every weighting

Carlisle received less than its share of state aid on three of four measures; its blended score of 35 stays between 29 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

41 / 100

218th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	62	39	26

Rank under other weightings: 201st to 241st.

Weighting-dependent: the range crosses the 45–55 band

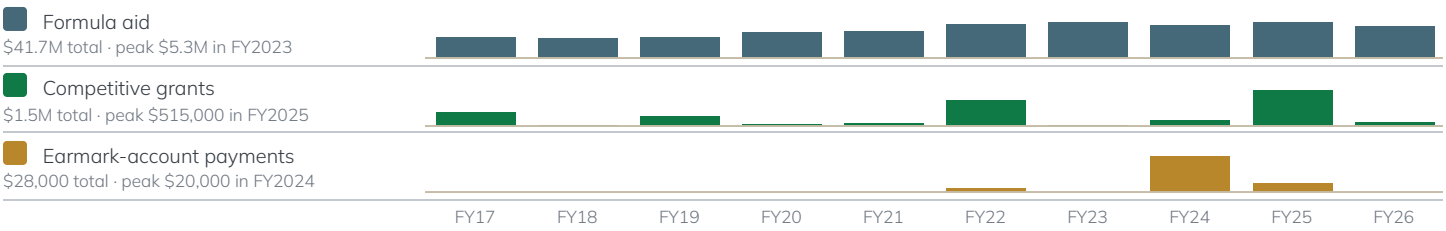
Carlisle received less than its share of discretionary money on three of four measures; its blended score of 41 stays between 35 and 47 under every weighting tested.

STATE MONEY, FY2017–FY2026

Carlisle's town government and school districts received $41.7 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$41.7M	**$1.5M**	**$28,000**
$7,968 per resident (256th of 351) · gross	$280 per resident (217th of 351)	$5.25 per resident (283rd of 351)

Competitive grants to Carlisle peaked in FY2025 at $515,000, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

Carlisle received $85,000 in local earmarks naming the town, $25,000 placed in the town and $85,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$85,000	**$25,000**	**$85,000**	**Not a member**
$16.22 per resident (277th of 351)	$4.77 per resident (313th of 351)	$16.22 per resident (286th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Carlisle directly.

Names the town includes $60,000 in clauses that name Carlisle but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $60,000 in one clause for state facilities located in Carlisle (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$20,000	"lighting upgrades for the Corey auditorium at the Carlisle public school"	Enacted names the town
FY2025	$5,000	"the police department in the town of Carlisle for equipment to collect and study traffic data"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Carlisle received 70% of its proportional share of competitive grant awards.

Local road miles **54.7** 230th of 351 · 10.4 per 1,000 residents (101st of 351)	Town-owned bridges, replacement cost **$823,000** scored exposure $120,000 · none in poor condition	Road-stream crossings **73** 186th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **15.3 sq mi** 10% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,239** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.70; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **811 acres** 8.3% of land area · FY2026	State-owned land PILOT, FY2026 **$288,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$354** statewide $117 · FY2026	New growth per resident **$33,871** FY2017–2025 · 86th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.6% of Carlisle's general-fund spending in FY2025, down from 9.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.1%** $1.8M of $20M · median town 14.1%	FY2016 **4.5%** $1.2M of $27.4M · median town 12.2%	FY2025 **5.6%** $2M of $36M · median town 11.5%	Net of state charges, FY2025 **5.5%** FY2010: 5.6% · median town 10.0%

Carlisle's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $809,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Carlisle's state aid did not keep pace with either price measure: FY2025 aid was 28.2% below its FY2006 aid grown by Boston-area consumer prices and 36.2% below grown by the government price index.

Gross state aid went from $1.8 million in FY2006 to $2 million in FY2025, +11.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+90.7%** $896,000 to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+90.6%** $1.9M to $3.6M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Carlisle's health insurance would have been $1.12 million in FY2025; it was $1.71 million, $589,000 above the path. Its fixed costs would have been $2.37 million in FY2025; it was $3.62 million, $1.25 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Carlisle came to $25,000, 3.1% of the $812,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	3.1%	28.2%
Placed in the town	$25,000	3.1%	42.3%
Everything placed	$25,000	3.1%	45.2%

SCHOOLS

Carlisle's required school contribution is 2.1% of

EXPECTED AND ACTUAL

Carlisle received $1.5 million in earmarks placed in the town and competitive grants over ten years, 59%

median household income, 298th highest of 351.

Chapter 70 aid, FY2026 **$2.4M** to the town's district	Required local contribution **$9.4M** FY2026
Share of household income **2.1%** 298th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+34%** after inflation

Carlisle runs its own district for some grades and belongs to Concord-Carlisle for others; Carlisle accounts for 23% of that district's foundation budget.

of the $2.5 million its size, need and institutions predict.

PEERS

Carlisle ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Carlisle this town	**35**	**$7,968**	**$280**	**$4.77**	**0.70**	**2.1%**
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
West Newbury peer	48	$10,655	$574	$38.12	0.91	2.1%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Carver

Town · Plymouth County · 11,712 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Plymouth · John R. Gaskey

STATE SENATE

Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS

Carver Public Schools, the town's own district

Old Colony Regional Vocational Technical School District, vocational, shared with Acushnet, Lakeville, Mattapoisett and Rochester

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Carver scores 50 on the Fairness Index for all state aid and 38 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

122nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	48	50	49

Rank under other weightings: 110th to 137th.

Near fair: between 45 and 55 under every weighting

Carver received less than its share of state aid on two of four measures; its blended score of 50 stays between 49 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

38 / 100

229th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	37	36	38

Rank under other weightings: 220th to 242nd.

Stable low: below 45 under every weighting

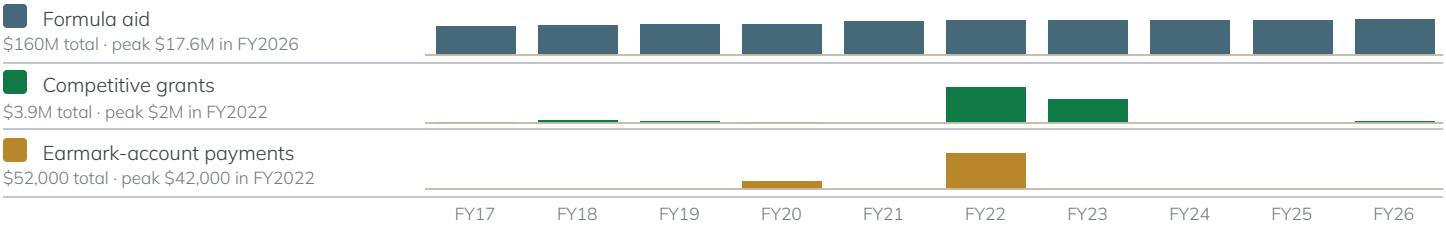
Carver received less than its share of discretionary money on all four measures; its blended score of 38 stays between 37 and 39 under every weighting tested.

STATE MONEY, FY2017–FY2026

Carver's town government and school districts received $160 million in formula aid and $3.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$160M	**$3.9M**	**$52,000**
$13,650 per resident (103rd of 351) · gross	$330 per resident (198th of 351)	$4.43 per resident (295th of 351)

Competitive grants to Carver peaked in FY2022 at $2 million, 52% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.9 million, are not shown.

EARMARKS

Carver received $90,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$90,000	**$90,000**	**$90,000**	**Not a member**
$7.68 per resident (301st of 351)	$7.68 per resident (309th of 351)	$7.68 per resident (310th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2023. Every one names Carver directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$30,000	"enhance services at the Carver council on aging"	Enacted names the town
FY2023	$20,000	"the Carver council on aging to install new fencing handrail along the sidewalk entrance at the council on aging facility"	Enacted names the town
FY2022	$20,000	"the Carver council on aging for improvements at the council on aging facility"	Enacted names the town
FY2020	$10,000	"enhance services at the Carver council on aging"	Enacted names the town
FY2019	$10,000	"enhance services at the Carver Council on Aging"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Carver received 83% of its proportional share of competitive grant awards.

Local road miles **80.0** 157th of 351 · 6.8 per 1,000 residents (163rd of 351)	Town-owned bridges, replacement cost **$6M** scored exposure $1.9M · none in poor condition	Road-stream crossings **174** 25th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **37.3 sq mi** 10% state-owned	Seasonal homes **3%** share of housing units	Peak service population **12,069** residents plus seasonal	Core infrastructure index **0.35** roads, culverts, dams, coast, flood, energy

Burden index 0.83; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,531 acres** 10.6% of land area · FY2026	State-owned land PILOT, FY2026 **$306,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$121** statewide $117 · FY2026	New growth per resident **$18,004** FY2017–2025 · 215th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 27.3% of Carver's general-fund spending in FY2025, down from 38.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **38.7%** $11.3M of $29.2M · median town 14.1%	FY2016 **33.7%** $11.8M of $35.1M · median town 12.2%	FY2025 **27.3%** $13.9M of $50.8M · median town 11.5%	Net of state charges, FY2025 **23.9%** FY2010: 37.7% · median town 10.0%

Carver's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $727,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Carver's state aid did not keep pace with either price measure: FY2025 aid was 20.7% below its FY2006 aid grown by Boston-area consumer prices and 29.5% below grown by the government price index.

Gross state aid went from $11.3 million in FY2006 to $13.9 million in FY2025, +23.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+471.2%** $925,000 to $5.3M · all towns +54.0%	All fixed costs, FY2016–25 **+277.9%** $2.2M to $8.5M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Carver's health insurance would have been $1.16 million in FY2025; it was $5.29 million, $4.13 million above the path. Its fixed costs would have been $2.81 million in FY2025; it was $8.49 million, $5.69 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2023 (+176%); health insurance changed by more than 30% in one year in FY2023 (+264%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Carver came to $90,000, 2.1% of the $4.36 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$90,000	2.1%	28.2%
Placed in the town	$90,000	2.1%	42.3%
Everything placed	$90,000	2.1%	45.2%

SCHOOLS

Carver's required school contribution is 3.0% of median household income, 75th highest of 351.

Chapter 70 aid, FY2026 **$11.7M** to the town's district	Required local contribution **$12.9M** FY2026
Share of household income **3.0%** 75th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Carver runs its own school district and also belongs to Old Colony; Carver accounts for 17% of that district's foundation budget.

EXPECTED AND ACTUAL

Carver received $4.3 million in earmarks placed in the town and competitive grants over ten years, 39% of the $11.2 million its size, need and institutions predict.

PEERS

Carver ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Carver this town	**50**	**$13,650**	**$330**	**$7.68**	**0.83**	**3.0%**
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Fairhaven lowest in class of 30	47	$10,747	$508	$12.58	0.36	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Charlemont

Town · Franklin County · 1,118 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Hawlemont Regional School District, shared with Hawley

Mohawk Trail Regional School District, shared with Ashfield, Buckland, Colrain, Hawley, Heath, Plainfield and Shelburne

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Charlemont scores 64 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

64 / 100

26th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	63	65	60

Rank under other weightings: 21st to 34th.

Stable high: above 55 under every weighting

Charlemont received more than its share of state aid on all four measures; its blended score of 65 stays between 63 and 66 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

12th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	97	94	97

Rank under other weightings: 10th to 13th.

Stable high: above 55 under every weighting

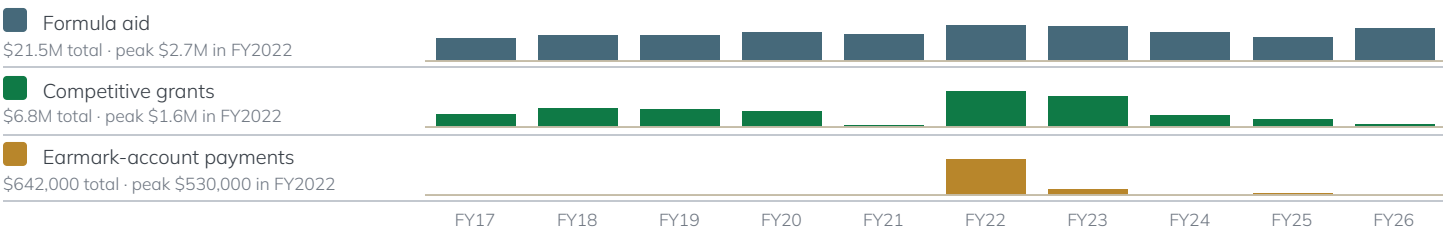
Charlemont received more than its share of discretionary money on all four measures; its blended score of 97 stays between 96 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Charlemont's town government and school districts received $21.5 million in formula aid and $6.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$21.5M	**$6.8M**	**$642,000**
$19,209 per resident (31st of 351) · gross	$6,110 per resident (12th of 351)	$574 per resident (2nd of 351)

Competitive grants to Charlemont peaked in FY2022 at $1.6 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

Charlemont received $165,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$165,000	**$165,000**	**$165,000**	**Not a member**
$148 per resident (18th of 351)	$148 per resident (28th of 351)	$148 per resident (34th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Charlemont directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the Hawlemont School in the town of Charlemont for emergency support"	Enacted names the town
FY2022	$40,000	"the town of Charlemont to support town planning operations"	Enacted names the town
FY2025	$25,000	"the town of Charlemont for the Mohawk Trail Regional and Hawlemont Districts sustainability study"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Charlemont received 2.68 times its proportional share of competitive grant awards.

Local road miles **42.4** 282nd of 351 · 37.9 per 1,000 residents (34th of 351)	Town-owned bridges, replacement cost **$46M** scored exposure $14.8M · five in poor condition	Road-stream crossings **75** 180th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **26.3 sq mi** 13% state-owned	Seasonal homes **7%** share of housing units	Peak service population **1,201** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 2.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,843 acres** 11.0% of land area · FY2026	State-owned land PILOT, FY2026 **$29,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$15.78** statewide $117 · FY2026	New growth per resident **$28,339** FY2017–2025 · 117th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.7% of Charlemont's general-fund spending in FY2025, down from 8.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.8%** $244,000 of $2.8M · median town 14.1%	FY2016 **8.2%** $279,000 of $3.4M · median town 12.2%	FY2025 **7.7%** $369,000 of $4.8M · median town 11.5%	Net of state charges, FY2025 **7.5%** FY2010: 10.5% · median town 10.0%

Charlemont's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $962,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Charlemont's state aid did not keep pace with either price measure: FY2025 aid was 2.3% below its FY2006 aid grown by Boston-area consumer prices and 13.2% below grown by the government price index.

Gross state aid went from $244,000 in FY2006 to $369,000 in FY2025, +51.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+129.5%** $54,000 to $124,000 · all towns +54.0%	All fixed costs, FY2016–25 **+68.6%** $172,000 to $291,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Charlemont's health insurance would have been $67,000 in FY2025; it was $124,000, $56,000 above the path. Its fixed costs would have been $215,000 in FY2025; it was $291,000, $75,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+31%), FY2021 (–69%) and FY2022 (+247%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Charlemont came to $165,000, 2.4 times the $70,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$165,000	2.4 times	28.2%
Placed in the town	$165,000	2.4 times	42.3%
Everything placed	$165,000	2.4 times	45.2%

SCHOOLS

Charlemont's required school contribution is 3.8% of median household income, 6th highest of 351.

Chapter 70 aid, FY2026 **$1.1M** attributed to the town	Required local contribution **$1.1M** FY2026
Share of household income **3.8%** 6th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Charlemont has no school district of its own. Its pupils attend Charlemont, Hawlemont and Mohawk Trail; Charlemont accounts for 100%, 87% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Charlemont received $7.1 million in earmarks placed in the town and competitive grants over ten years, 85% of the $8.3 million its size, need and institutions predict.

PEERS

Charlemont ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Charlemont this town	**64**	**$19,209**	**$6,110**	**$148**	**2.68**	**3.8%**
Wendell peer	65	$24,634	$5,863	$106	0.54	3.0%
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Plainfield peer	52	$15,369	$4,077	$0	1.79	4.5%
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Charlton

Town · Worcester County · 13,435 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Worcester · John J. Marsi 76% of residents
7th Worcester · Paul K. Frost 24% of residents

Charlton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Dudley-Charlton Regional School District, shared with Dudley
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Dudley, North Brookfield, Oxford, Paxton, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Charlton scores 56 on the Fairness Index for all state aid and 29 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

77th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	63	48	58

Rank under other weightings: 59th to 99th.

Weighting-dependent: the range crosses the 45–55 band

Charlton received more than its share of state aid on three of four measures; its blended score of 55 stays between 53 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

29 / 100

269th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	35	25	31

Rank under other weightings: 263rd to 275th.

Stable low: below 45 under every weighting

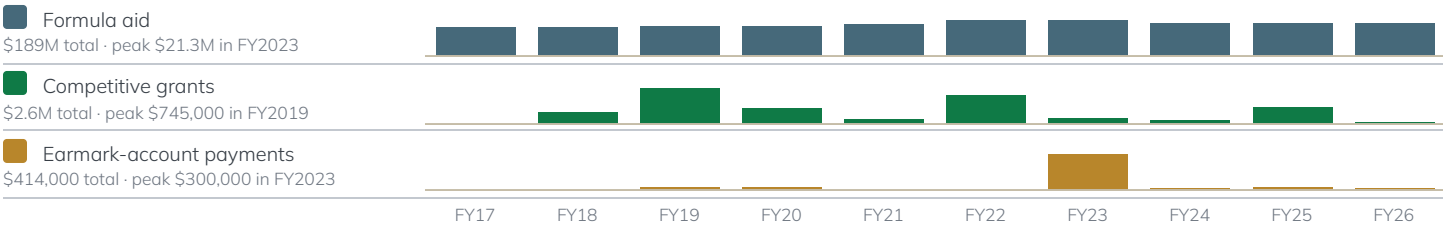
Charlton received less than its share of discretionary money on all four measures; its blended score of 29 stays between 27 and 32 under every weighting tested.

STATE MONEY, FY2017–FY2026

Charlton's town government and school districts received $189 million in formula aid and $2.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$189M	**$2.6M**	**$414,000**
$14,031 per resident (94th of 351) · gross	$197 per resident (254th of 351)	$30.80 per resident (146th of 351)

Competitive grants to Charlton peaked in FY2019 at $745,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.5 million, are not shown.

EARMARKS

Charlton received $320,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$320,000	**$320,000**	**$320,000**	**Not a member**
$23.82 per resident (252nd of 351)	$23.82 per resident (261st of 351)	$23.82 per resident (262nd of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2026. Every one names Charlton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$150,000	"the fire department in the town of Charlton"	Enacted names the town
FY2025	$25,000	"Charlton for the procurement of a new alerting system for the Charlton fire department"	Enacted names the town
FY2024	$25,000	"facilities upgrades at the police station in the town of Charlton, including, but not limited to, physical plant, structural and computer system…"	Enacted names the town
FY2023	$25,000	"the town of Charlton for roof replacement at the Charlton police station"	Enacted names the town
FY2020	$25,000	"communication equipment for the Charlton Fire Department in the town of Charlton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Charlton received 74% of its proportional share of competitive grant awards.

Local road miles **126.7** 54th of 351 · 9.4 per 1,000 residents (115th of 351)	Town-owned bridges, replacement cost **$13.5M** scored exposure $3.6M · two in poor condition	Road-stream crossings **275** 2nd of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **42.2 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **13,555** residents plus seasonal	Core infrastructure index **0.50** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **300 acres** 1.1% of land area · FY2026	State-owned land PILOT, FY2026 **$12,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$38.31** statewide $117 · FY2026	New growth per resident **$63,686** FY2017–2025 · 22nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.5% of Charlton's general-fund spending in FY2025, down from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $1.4M of $16.8M · median town 14.1%	FY2016 **6.0%** $1.4M of $24.1M · median town 12.2%	FY2025 **4.5%** $1.9M of $42.2M · median town 11.5%	Net of state charges, FY2025 **4.3%** FY2010: 6.7% · median town 10.0%

Charlton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $13.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Charlton's state aid did not keep pace with either price measure: FY2025 aid was 11.9% below its FY2006 aid grown by Boston-area consumer prices and 21.7% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $1.9 million in FY2025, +36.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+77.1%** $972,000 to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+102.5%** $2.2M to $4.5M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Charlton's health insurance would have been $1.21 million in FY2025; it was $1.72 million, $508,000 above the path. Its fixed costs would have been $2.77 million in FY2025; it was $4.49 million, $1.72 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Charlton came to $300,000, 40.0% of the $750,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$300,000	40.0%	28.2%
Placed in the town	$300,000	40.0%	42.3%
Everything placed	$300,000	40.0%	45.2%

SCHOOLS

Charlton's required school contribution is 3.0% of median household income, 73rd highest of 351.

Chapter 70 aid, FY2026 **$12.6M** attributed to the town	Required local contribution **$17.8M** FY2026
Share of household income **3.0%** 73rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–14%** after inflation

Charlton has no school district of its own. Its pupils attend Dudley Charlton and Southern Worcester; Charlton accounts for 53% and 15% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Charlton received $3 million in earmarks placed in the town and competitive grants over ten years, 65% of the $4.6 million its size, need and institutions predict.

PEERS

Charlton ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Charlton this town	**56**	**$14,031**	**$197**	**$23.82**	**0.74**	**3.0%**
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Chatham

Town · Barnstable County · 6,681 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
4th Barnstable · Hadley Luddy

STATE SENATE
Cape and Islands · Julian Cyr

SCHOOL DISTRICTS
Monomoy Regional School District, shared with Harwich
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Dennis, Eastham, Harwich, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY
Cape Cod Commission

FAIRNESS INDEX

Chatham scores 23 on the Fairness Index for all state aid and 64 for discretionary money. Fifty is a fair share.

ALL STATE AID

23 / 100

347th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	19	30	25

Rank under other weightings: 333rd to 349th.

Stable low: below 45 under every weighting

Chatham received less than its share of state aid on all four measures; its blended score of 23 stays between 21 and 26 under every weighting tested.

DISCRETIONARY MONEY ONLY

64 / 100

128th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	70	38	77

Rank under other weightings: 108th to 153rd.

Stable high: above 55 under every weighting

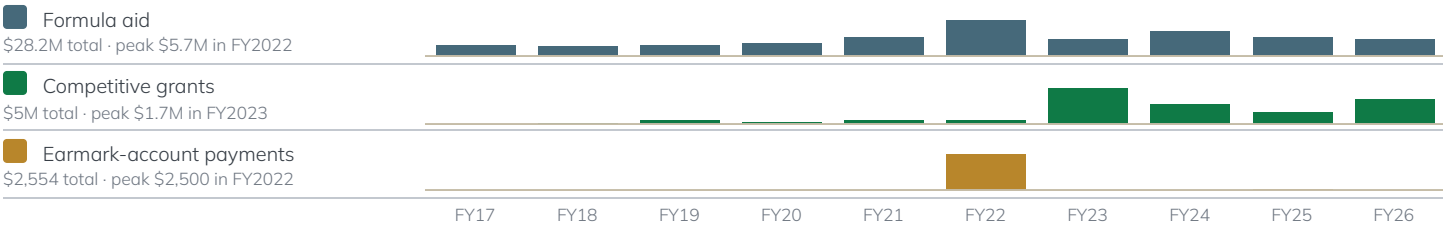
Chatham received more than its share of discretionary money on three of four measures; its blended score of 64 stays between 58 and 70 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chatham's town government and school districts received $28.2 million in formula aid and $5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$28.2M	**$5M**	**$2,554**
$4,225 per resident (350th of 351) · gross	$743 per resident (104th of 351)	$0.38 per resident (332nd of 351)

Competitive grants to Chatham peaked in FY2023 at $1.7 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $49.4 million, are not shown.

EARMARKS

Chatham received $0 in local earmarks naming the town, $1.6 million placed in the town and $1.6 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$1.6M**	**$1.6M**	**Not a member**
enacted, ten budgets	$246 per resident (7th of 351)	$246 per resident (12th of 351)	35 municipalities had none

Placed in the town: six clauses in five of ten budgets; the most recent in FY2026. $0 came in clauses that name Chatham; the other $1.6 million went to organizations based in Chatham, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$500,000	"the Cape Cod Commercial Fishermen's Alliance, Inc. for the modernization and maintenance of sustainable fishing"	Enacted recipient based here
FY2025	$500,000	"the Cape Cod Commercial Fishermen's Alliance, Inc. for the modernization and maintenance of sustainable fishing"	Enacted recipient based here
FY2024	$500,000	"the Cape Cod Commercial Fishermen's Alliance for the modernization and maintenance of sustainable fishing"	Enacted recipient based here
FY2023	$75,000	"the Cape Cod Commercial Fishermen's Alliance, Inc. to conduct a study of winter flounder spawning and activity in and around the commonwealth's ports…"	Enacted recipient based here
FY2020	$40,000	"the Cape Cod Commercial Fishermen's Alliance to provide young fisherwomen and fishermen training to succeed in entry-level positions in Cape Cod's…"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Chatham received 70% of its proportional share of competitive grant awards.

Local road miles **66.5** 198th of 351 · 10.0 per 1,000 residents (110th of 351)	Town-owned bridges, replacement cost **$7.2M** scored exposure $582,000 · none in poor condition	Road-stream crossings **31** 313th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.2 sq mi** 0% state-owned	Seasonal homes **54%** share of housing units	Peak service population **14,469** residents plus seasonal	Core infrastructure index **0.55** roads, culverts, dams, coast, flood, energy

Burden index 0.70; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$143,505** FY2017–2025 · 6th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

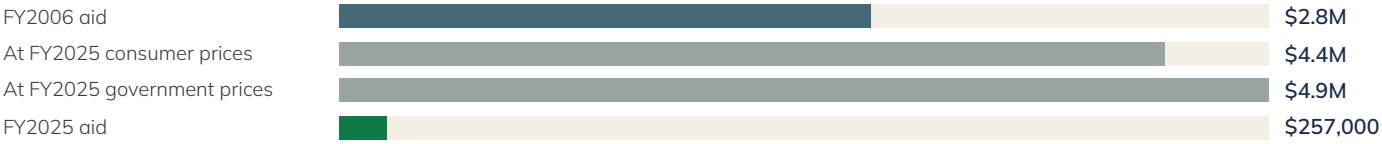
State aid covered 0.5% of Chatham's general-fund spending in FY2025, down from 9.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.6%** $2.8M of $29.4M · median town 14.1%	FY2016 **3.0%** $1.1M of $38.3M · median town 12.2%	FY2025 **0.5%** $257,000 of $55M · median town 11.5%	Net of state charges, FY2025 **-1.3%** FY2010: 6.6% · median town 10.0%

Chatham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chatham's state aid did not keep pace with either price measure: FY2025 aid was 94.1% below its FY2006 aid grown by Boston-area consumer prices and 94.8% below grown by the government price index.



Gross state aid went from $2.8 million in FY2006 to $257,000 in FY2025, –90.9% in dollars. Flag: in FY2010, $952,000 of Chatham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.7%** $2.2M to $3.1M · all towns +54.0%	All fixed costs, FY2016–25 **+56.3%** $4.6M to $7.1M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chatham's health insurance would have been $2.74 million in FY2025; it was $3.13 million, $392,000 above the path. Its fixed costs would have been $5.69 million in FY2025; it was $7.12 million, $1.43 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chatham came to $0, 0.0% of the $938,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$1.1M	118.8%	42.3%
Everything placed	$1.1M	118.8%	45.2%

SCHOOLS

Chatham's required school contribution is 1.8% of median household income, 323rd highest of 351.

Chapter 70 aid, FY2026 **$1.1M** attributed to the town	Required local contribution **$5.1M** FY2026
Share of household income **1.8%** 323rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+40%** after inflation

Chatham has no school district of its own. Its pupils attend Monomoy and Cape Cod; Chatham accounts for 23% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Chatham received $6.9 million in earmarks placed in the town and competitive grants over ten years, about the $7 million its size, need and institutions predict.

PEERS

Chatham ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chatham this town	**23**	**$4,225**	**$743**	**$246**	**0.70**	**1.8%**
Great Barrington peer · best in class of 30	42	$9,461	$2,113	$175	2.92	3.7%
Lee peer	38	$7,783	$1,292	$21.86	2.91	3.1%
Tisbury peer · lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Sheffield peer	47	$9,816	$2,468	$0	1.94	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Chelmsford

Town · Middlesex County · 36,446 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Middlesex · Simon Cataldo 46% of residents
16th Middlesex · Rodney M. Elliott 34% of residents
2nd Middlesex · James Arciero 21% of residents

Chelmsford is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Chelmsford Public Schools, the town's own district
Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Groton, Littleton, Pepperell, Shirley, Townsend and Westford

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Chelmsford scores 31 on the Fairness Index for all state aid and 30 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

300th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	40	27	25

Rank under other weightings: 289th to 310th.

Stable low: below 45 under every weighting

Chelmsford received less than its share of state aid on all four measures; its blended score of 31 stays between 28 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

30 / 100

268th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	38	29	23

Rank under other weightings: 267th to 271st.

Stable low: below 45 under every weighting

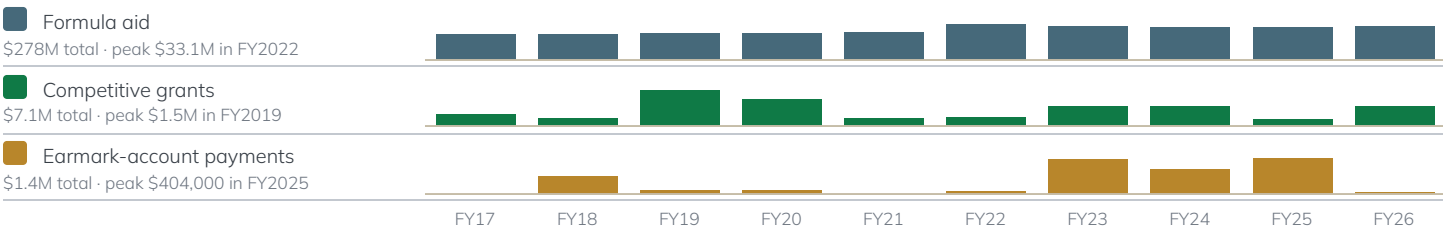
Chelmsford received less than its share of discretionary money on all four measures; its blended score of 30 stays between 27 and 32 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chelmsford's town government and school districts received $278 million in formula aid and $7.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$278M	$7.1M	$1.4M
$7,630 per resident (270th of 351) · gross	$194 per resident (256th of 351)	$39.00 per resident (113th of 351)

Competitive grants to Chelmsford peaked in FY2019 at $1.5 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $22.4 million, are not shown.

EARMARKS

Chelmsford received $1.5 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.5M	$1.5M	$1.5M	Not a member
$41.84 per resident (174th of 351)	$41.84 per resident (194th of 351)	$41.84 per resident (197th of 351)	35 municipalities had none

Placed in the town: 27 clauses in nine of ten budgets; the most recent in FY2026. Every one names Chelmsford directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$200,000	"a signage and wayfinding program in the town of Chelmsford as part of a project to improve the pedestrian, bicycle and public parking areas and the..."	Enacted names the town
FY2023	$100,000	"the Chelmsford Center for the Arts for energy efficiency improvements"	Enacted names the town
FY2023	$100,000	"the preliminary design of transportation improvements to Vinal square in the town of Chelmsford"	Enacted names the town
FY2020	$100,000	"the town of Chelmsford for the continued implementation of a business grant program"	Enacted names the town
FY2025	$75,000	"Chelmsford for the planting of shade trees along the town's right of way in the area designated as the environmental justice community"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Chelmsford received 37% of its proportional share of competitive grant awards.

Local road miles **179.4** 25th of 351 · 4.9 per 1,000 residents (239th of 351)	Town-owned bridges, replacement cost **$7.3M** scored exposure $2.3M · none in poor condition	Road-stream crossings **183** 17th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.4 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **36,666** residents plus seasonal	Core infrastructure index **1.12** roads, culverts, dams, coast, flood, energy

Burden index 0.37; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **21 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$9,524** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$461** statewide $117 · FY2026	New growth per resident **$23,349** FY2017–2025 · 150th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.9% of Chelmsford's general-fund spending in FY2025, down from 15.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.4%** $13.5M of $87.7M · median town 14.1%	FY2016 **14.1%** $16.5M of $117M · median town 12.2%	FY2025 **13.9%** $21.8M of $158M · median town 11.5%	Net of state charges, FY2025 **12.4%** FY2010: 13.8% · median town 10.0%

Chelmsford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $969,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chelmsford's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 4.3% above its FY2006 aid grown by Boston-area consumer prices and 7.3% below grown by the government price index.

Gross state aid went from $13.5 million in FY2006 to $21.8 million in FY2025, +61.7% in dollars. Flag: in FY2010, $379,000 of Chelmsford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+62.2%** $10.4M to $16.8M · all towns +54.0%	All fixed costs, FY2016–25 **+57.3%** $19.1M to $30M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chelmsford's health insurance would have been $12.9 million in FY2025; it was $16.8 million, $3.87 million above the path. Its fixed costs would have been $23.8 million in FY2025; it was $30 million, $6.19 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chelmsford came to $1.4 million, 21.7% of the $6.45 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	21.7%	28.2%
Placed in the town	$1.4M	21.7%	42.3%
Everything placed	$1.4M	21.7%	45.2%

SCHOOLS

Chelmsford's required school contribution is 3.1% of median household income, 48th highest of 351.

Chapter 70 aid, FY2026 **$16.4M** to the town's district	Required local contribution **$58.7M** FY2026
Share of household income **3.1%** 48th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Chelmsford runs its own school district and also belongs to Nashoba Valley; Chelmsford accounts for 27% of that district's foundation budget.

EXPECTED AND ACTUAL

Chelmsford received $9.2 million in earmarks placed in the town and competitive grants over ten years, 7% more than the $8.6 million its size, need and institutions predict.

PEERS

Chelmsford ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chelmsford this town	**31**	**$7,630**	**$194**	**$41.84**	**0.37**	**3.1%**
Arlington peer	32	$7,131	$184	$64.10	0.96	2.2%
Billerica peer	39	$9,140	$64.58	$21.52	0.29	2.7%
Melrose peer	35	$7,621	$417	$63.68	2.22	2.7%
Danvers peer	30	$6,947	$129	$53.36	0.20	2.9%
Dedham peer	28	$6,510	$161	$81.43	0.48	2.4%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Hanover lowest in class of 30	38	$9,140	$220	$18.83	0.60	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

SUFFOLK COUNTY

Chelsea

City · Suffolk County · 39,908 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Suffolk · Judith A. Garcia

STATE SENATE

Middlesex and Suffolk · Sal N. DiDomenico

SCHOOL DISTRICTS

Chelsea Public Schools, the city's own district

Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Malden, Melrose, North Reading, Reading, Revere, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Chelsea scores 77 on the Fairness Index for all state aid and 76 for discretionary money. Fifty is a fair share.

ALL STATE AID

77 / 100

5th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
81	73	74	81

Rank under other weightings: 4th to 5th.

Stable high: above 55 under every weighting

Chelsea received more than its share of state aid on all four measures; its blended score of 77 stays between 75 and 79 under every weighting tested.

DISCRETIONARY MONEY ONLY

76 / 100

86th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
78	69	80	78

Rank under other weightings: 81st to 91st.

Stable high: above 55 under every weighting

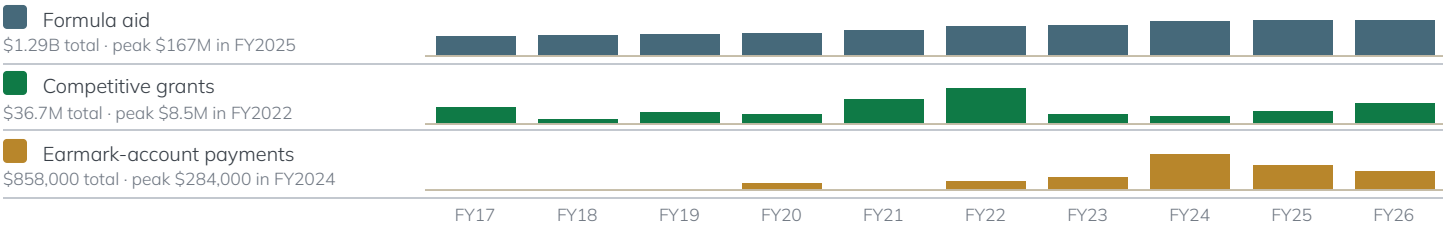
Chelsea received more than its share of discretionary money on all four measures; its blended score of 76 stays between 75 and 78 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chelsea's town government and school districts received $1.29 billion in formula aid and $36.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.29B	**$36.7M**	**$858,000**
$32,370 per resident (4th of 351) · gross	$919 per resident (83rd of 351)	$21.51 per resident (194th of 351)

Competitive grants to Chelsea peaked in FY2022 at $8.5 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $99.2 million, are not shown.

EARMARKS

Chelsea received $1.6 million in local earmarks naming the town, $5.9 million placed in the town and $5.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.6M	**$5.9M**	**$5.9M**	**Not a member**
$40.85 per resident (182nd of 351)	$147 per resident (29th of 351)	$147 per resident (35th of 351)	35 municipalities had none

Placed in the town: 49 clauses in ten of ten budgets; the most recent in FY2026. $1.6 million came in clauses that name Chelsea; the other $4.2 million went to organizations based in Chelsea, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$1.2M	"Roca. Inc.'s young mothers experiencing acute trauma pilot program"	Enacted recipient based here
FY2025	$1M	"Roca. Inc.'s young mothers experiencing acute trauma pilot program"	Enacted recipient based here
FY2024	$1M	"Roca, Inc. to provide case management, trauma-informed supports and advocacy to mothers ages 14 through 24 and their children who are experiencing…"	Enacted recipient based here
FY2020	$250,000	"Community Action Programs Inter-City, Inc. for the communities specified in item 7004-0099 of section 2 of chapter 68 of the acts of 2011"	Enacted recipient based here
FY2019	$250,000	"the Community Action Programs Inter-City, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Chelsea received 3.69 times its proportional share of competitive grant awards.

Local road miles **45.9** 266th of 351 · 1.1 per 1,000 residents (349th of 351)	Town-owned bridges, replacement cost **$30.9M** scored exposure $30.5M · 0.5 in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **2.2 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **39,936** residents plus seasonal	Core infrastructure index **4.31** roads, culverts, dams, coast, flood, energy

Burden index 3.69; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **19 acres** 1.4% of land area · FY2026	State-owned land PILOT, FY2026 **$281,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$14,611** statewide $117 · FY2026	New growth per resident **$27,132** FY2017–2025 · 124th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 54.2% of Chelsea's general-fund spending in FY2025, down from 57.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **57.9%** $60M of $104M · median town 14.1%	FY2016 **55.0%** $80.6M of $146M · median town 12.2%	FY2025 **54.2%** $138M of $254M · median town 11.5%	Net of state charges, FY2025 **44.9%** FY2010: 48.8% · median town 10.0%

Chelsea's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chelsea's state aid kept pace with both price measures: FY2025 aid was 48.2% above its FY2006 aid grown by Boston-area consumer prices and 31.7% above grown by the government price index.

Gross state aid went from $60 million in FY2006 to $138 million in FY2025, +129.8% in dollars. Flag: in FY2010, $5.9 million of Chelsea's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+374.4%** $6.5M to $31M · all towns +54.0%	All fixed costs, FY2016–25 **+191.0%** $14.9M to $43.5M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chelsea's health insurance would have been $8.17 million in FY2025; it was $31 million, $22.9 million above the path. Its fixed costs would have been $18.7 million in FY2025; it was $43.5 million, $24.8 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+342%); fixed costs changed by more than 30% in one year in FY2022 (+110%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2017, FY2018, FY2019, FY2020 and FY2021 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chelsea came to $1.4 million, 5.8% of the $24.5 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	5.8%	28.2%
Placed in the town	$4.4M	18.0%	42.3%
Everything placed	$4.4M	18.0%	45.2%

SCHOOLS

Chelsea's required school contribution is 2.6% of median household income, 175th highest of 351.

Chapter 70 aid, FY2026 **$136M** to the town's district	Required local contribution **$26.1M** FY2026
Share of household income **2.6%** 175th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+34%** after inflation

Chelsea runs its own school district and also belongs to Northeast Metropolitan; Chelsea accounts for 18% of that district's foundation budget.

EXPECTED AND ACTUAL

Chelsea received $49.2 million in earmarks placed in the town and competitive grants over ten years, 25% more than the $39.2 million its size, need and institutions predict.

PEERS

Chelsea ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chelsea this town	**77**	**$32,370**	**$919**	**$147**	**3.69**	**2.6%**
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
Fitchburg peer	68	$22,494	$765	$118	2.33	2.1%
Holyoke peer	78	$31,543	$801	$93.22	1.95	1.7%
Chicopee peer · lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%
Amherst peer	36	$8,017	$722	$84.88	2.44	3.7%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Cheshire

Town · Berkshire County · 3,216 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Hoosac Valley Regional School District, shared with Adams
Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Clarksburg, Florida, Lanesborough, Monroe, North Adams, Savoy and Williamstown

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Cheshire scores 55 on the Fairness Index for all state aid and 83 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

87th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	46	55	63

Rank under other weightings: 61st to 112th.

Weighting-dependent: the range crosses the 45–55 band

Cheshire received more than its share of state aid on three of four measures; its blended score of 55 stays between 52 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

83 / 100

63rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	77	83	87

Rank under other weightings: 56th to 69th.

Stable high: above 55 under every weighting

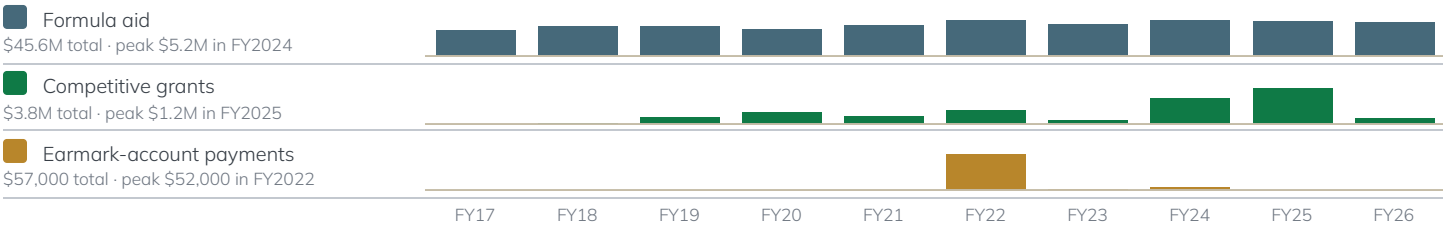
Cheshire received more than its share of discretionary money on all four measures; its blended score of 83 stays between 81 and 84 under every weighting tested.

STATE MONEY, FY2017–FY2026

Cheshire's town government and school districts received $45.6 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$45.6M	$3.8M	$57,000
$14,188 per resident (89th of 351) · gross	$1,187 per resident (69th of 351)	$17.82 per resident (215th of 351)

Competitive grants to Cheshire peaked in FY2025 at $1.2 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.4 million, are not shown.

EARMARKS

Cheshire received $160,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$160,000	$160,000	$160,000	Not a member
$49.75 per resident (150th of 351)	$49.75 per resident (172nd of 351)	$49.75 per resident (176th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2023. Every one names Cheshire directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$50,000	"the de-weeding of Cheshire lake"	Enacted names the town
FY2021	$50,000	"the resurfacing of a section of route 116 in Cheshire"	Enacted names the town
FY2018	$50,000 (split two ways)	"grants to the Adams-Cheshire regional school district for the purpose of offsetting increased costs"	Enacted names the town
FY2023	$10,000	"the Cheshire Community Association community needs assessment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Cheshire received 2.39 times its proportional share of competitive grant awards.

Local road miles **44.0** 273rd of 351 · 13.7 per 1,000 residents (76th of 351)	Town-owned bridges, replacement cost **$12.1M** scored exposure $3.8M · two in poor condition	Road-stream crossings **70** 196th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **26.8 sq mi** 29% state-owned	Seasonal homes **6%** share of housing units	Peak service population **3,434** residents plus seasonal	Core infrastructure index **2.79** roads, culverts, dams, coast, flood, energy

Burden index 2.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,980 acres** 29.0% of land area · FY2026	State-owned land PILOT, FY2026 **$195,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$39.11** statewide $117 · FY2026	New growth per resident **$8,489** FY2017–2025 · 334th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.6% of Cheshire's general-fund spending in FY2025, down from 20.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.0%** $857,000 of $4.3M · median town 14.1%	FY2016 **14.7%** $728,000 of $4.9M · median town 12.2%	FY2025 **14.6%** $1M of $7M · median town 11.5%	Net of state charges, FY2025 **13.6%** FY2010: 19.8% · median town 10.0%

Cheshire's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Cheshire's state aid did not keep pace with either price measure: FY2025 aid was 23.3% below its FY2006 aid grown by Boston-area consumer prices and 31.9% below grown by the government price index.

Gross state aid went from $857,000 in FY2006 to $1 million in FY2025, +18.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+53.4%** $198,000 to $304,000 · all towns +54.0%	All fixed costs, FY2016–25 **+55.1%** $368,000 to $570,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Cheshire's health insurance would have been $247,000 in FY2025; it was $304,000, $56,000 above the path. Its fixed costs would have been $459,000 in FY2025; it was $570,000, $111,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2019 (–37%) and FY2024 (+49%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Cheshire came to $160,000, 151.4% of the $106,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$160,000	151.4%	28.2%
Placed in the town	$160,000	151.4%	42.3%
Everything placed	$160,000	151.4%	45.2%

SCHOOLS

Cheshire's required school contribution is 2.8% of median household income, 116th highest of 351.

Chapter 70 aid, FY2026 **$3.1M** attributed to the town	Required local contribution **$3M** FY2026
Share of household income **2.8%** 116th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+9%** after inflation

Cheshire has no school district of its own. Its pupils attend Cheshire, Hoosac Valley and Northern Berkshire; Cheshire accounts for 100%, 26% and 10% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Cheshire received $4.4 million in earmarks placed in the town and competitive grants over ten years, 15% more than the $3.8 million its size, need and institutions predict.

PEERS

Cheshire ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Cheshire this town	**55**	**$14,188**	**$1,187**	**$49.75**	**2.39**	**2.8%**
Warren peer	67	$20,879	$1,969	$10.98	1.67	2.5%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
North Brookfield peer	56	$15,678	$1,128	$7.35	0.87	2.9%
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Chester

Town · Hampden County · 1,240 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark	Gateway Regional School District, shared with Blandford, Huntington, Middlefield, Montgomery and Russell	Pioneer Valley Planning Commission

FAIRNESS INDEX

Chester scores 61 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

61 / 100

40th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	66	55	59

Rank under other weightings: 30th to 53rd.

Stable high: above 55 under every weighting

Chester received more than its share of state aid on all four measures; its blended score of 61 stays between 59 and 64 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100

23rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
97	97	88	96

Rank under other weightings: 20th to 27th.

Stable high: above 55 under every weighting

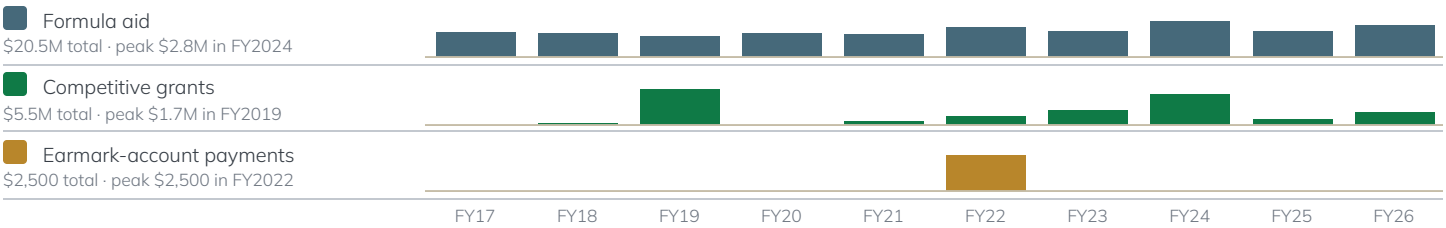
Chester received more than its share of discretionary money on all four measures; its blended score of 94 stays between 93 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chester's town government and school districts received $20.5 million in formula aid and $5.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$20.5M	$5.5M	$2,500
$16,538 per resident (53rd of 351) · gross	$4,421 per resident (19th of 351)	$2.02 per resident (313th of 351)

Competitive grants to Chester peaked in FY2019 at $1.7 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.4 million, are not shown.

EARMARKS

No local earmark was placed in Chester in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Chester's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Chester.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Chester's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Conway	$0	$0	$0	$0
Windsor	$25,000	$25,000	$25,000	$23.47
Oakham	$20,000	$20,000	$20,000	$12.20
Cummington	$0	$0	$0	$0
Williamsburg	$10,000	$10,000	$10,000	$3.71

WHAT THE TOWN CARRIES

Measured against what it maintains, Chester received 2.11 times its proportional share of competitive grant awards.

Local road miles **56.9** 222nd of 351 · 45.9 per 1,000 residents (30th of 351)	Town-owned bridges, replacement cost **$37.9M** scored exposure $14.5M · four in poor condition	Road-stream crossings **85** 154th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **36.6 sq mi** 18% state-owned	Seasonal homes **16%** share of housing units	Peak service population **1,527** residents plus seasonal	Core infrastructure index **0.75** roads, culverts, dams, coast, flood, energy

Burden index 2.11; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,379 acres** 14.4% of land area · FY2026	State-owned land PILOT, FY2026 **$30,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$8.99** statewide $117 · FY2026	New growth per resident **$9,501** FY2017–2025 · 328th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.6% of Chester's general-fund spending in FY2025, down from 10.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.3%** $280,000 of $2.7M · median town 14.1%	FY2016 **10.5%** $332,000 of $3.2M · median town 12.2%	FY2025 **9.6%** $354,000 of $3.7M · median town 11.5%	Net of state charges, FY2025 **9.5%** FY2010: 12.4% · median town 10.0%

Chester's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $922,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chester's state aid did not keep pace with either price measure: FY2025 aid was 18.5% below its FY2006 aid grown by Boston-area consumer prices and 27.6% below grown by the government price index.

Gross state aid went from $280,000 in FY2006 to $354,000 in FY2025, +26.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–10.1%** $61,000 to $55,000 · all towns +54.0%	All fixed costs, FY2016–25 **+87.5%** $156,000 to $292,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chester's health insurance would have been $76,000 in FY2025; it was $55,000, $21,000 below the path. Its fixed costs would have been $194,000 in FY2025; it was $292,000, $97,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+50%), FY2020 (+34%) and FY2021 (–38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Chester's reported health insurance fell from $61,000 in FY2016 to $55,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Chester's required school contribution is 2.4% of median household income, 251st highest of 351.

Chapter 70 aid, FY2026 **$1.2M** attributed to the town	Required local contribution **$1.1M** FY2026
Share of household income **2.4%** 251st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Chester has no school district of its own. Its pupils attend Chester and Gateway; Chester accounts for 100% and 17% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Chester received $5.5 million in earmarks placed in the town and competitive grants over ten years, 63% more than the $3.4 million its size, need and institutions predict.

PEERS

Chester is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chester this town	**61**	**$16,538**	**$4,421**	**$0**	**2.11**	**2.4%**
Conway peer · lowest in class of 30	48	$12,799	$405	$0	0.68	2.5%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Oakham peer	61	$18,722	$794	$12.20	1.24	3.2%
Cummington peer	49	$9,157	$4,050	$0	1.51	1.5%
Williamsburg peer	41	$9,541	$578	$3.71	1.40	2.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Chesterfield

Town · Hampshire County · 1,055 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Hampshire · Lindsay N. Sabadosa

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Chesterfield-Goshen Regional School District, shared with Goshen
Hampshire Regional School District, shared with Goshen, Southampton, Westhampton and Williamsburg

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Chesterfield scores 65 on the Fairness Index for all state aid and 99 for discretionary money. Fifty is a fair share.

ALL STATE AID

65 / 100

24th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	71	61	57

Rank under other weightings: 14th to 39th.

Stable high: above 55 under every weighting

Chesterfield received more than its share of state aid on all four measures; its blended score of 65 stays between 61 and 68 under every weighting tested.

DISCRETIONARY MONEY ONLY

99 / 100

1st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
99	99	99	99

Rank 1st under every weighting tested.

Stable high: above 55 under every weighting

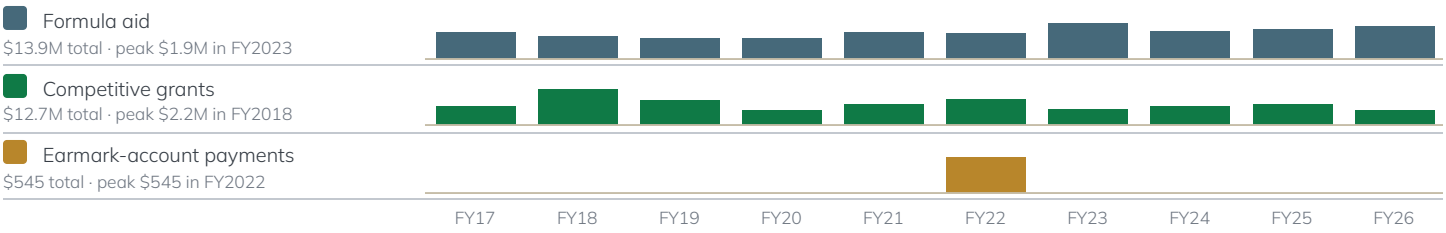
Chesterfield received more than its share of discretionary money on all four measures; its blended score of 99 stays between 99 and 99 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chesterfield's town government and school districts received $13.9 million in formula aid and $12.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$13.9M	**$12.7M**	**$545**
$13,176 per resident (108th of 351) · gross	$12,060 per resident (3rd of 351)	$0.52 per resident (330th of 351)

Competitive grants to Chesterfield were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1 million, are not shown.

EARMARKS

Chesterfield received $0 in local earmarks naming the town, $225,000 placed in the town and $225,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$225,000**	**$225,000**	**Not a member**
enacted, ten budgets	$213 per resident (9th of 351)	$213 per resident (17th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2024. $0 came in clauses that name Chesterfield; the other $225,000 went to organizations based in Chesterfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$150,000	"the Hilltown Community Development Corporation to support economic development including, but not limited to farming, workers and business adaptation..."	Enacted recipient based here
FY2017	$50,000	"the Hilltown Community Development Corporation to establish a rural capacity building initiative"	Enacted recipient based here
FY2024	$25,000	"the Northern Hilltowns Consortium of Councils on Aging for community engagement activities for seniors"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Chesterfield received 1.15 times its proportional share of competitive grant awards.

Local road miles **54.4** 233rd of 351 · 51.6 per 1,000 residents (25th of 351)	Town-owned bridges, replacement cost **$9.3M** scored exposure $3M · three in poor condition	Road-stream crossings **37** 302nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.8 sq mi** 29% state-owned	Seasonal homes **15%** share of housing units	Peak service population **1,245** residents plus seasonal	Core infrastructure index **0.45** roads, culverts, dams, coast, flood, energy

Burden index 1.15; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,165 acres** 26.2% of land area · FY2026	State-owned land PILOT, FY2026 **$134,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$25.92** statewide $117 · FY2026	New growth per resident **$19,446** FY2017–2025 · 196th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.9% of Chesterfield's general-fund spending in FY2025, up from 10.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.6%** $238,000 of $2.2M · median town 14.1%	FY2016 **10.9%** $335,000 of $3.1M · median town 12.2%	FY2025 **10.9%** $456,000 of $4.2M · median town 11.5%	Net of state charges, FY2025 **10.8%** FY2010: 10.9% · median town 10.0%

Chesterfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $497,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chesterfield's state aid kept pace with both price measures: FY2025 aid was 23.4% above its FY2006 aid grown by Boston-area consumer prices and 9.7% above grown by the government price index.

Gross state aid went from $238,000 in FY2006 to $456,000 in FY2025, +91.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+10.0%** $53,000 to $58,000 · all towns +54.0%	All fixed costs, FY2016–25 **+109.9%** $125,000 to $262,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chesterfield's health insurance would have been $66,000 in FY2025; it was $58,000, $7,875 below the path. Its fixed costs would have been $156,000 in FY2025; it was $262,000, $106,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+39%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chesterfield came to $0, 0.0% of the $5,296 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$225,000	42.5 times	42.3%
Everything placed	$225,000	42.5 times	45.2%

SCHOOLS

Chesterfield's required school contribution is 2.7% of median household income, 161st highest of 351.

Chapter 70 aid, FY2026 **$662,000** attributed to the town	Required local contribution **$1.1M** FY2026
Share of household income **2.7%** 161st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

Chesterfield has no school district of its own. Its pupils attend Chesterfield, Chesterfield-Goshen and Hampshire; Chesterfield accounts for 100%, 55% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Chesterfield received $13.7 million in earmarks placed in the town and competitive grants over ten years, 3.4 times the $4 million its size, need and institutions predict.

PEERS

Chesterfield ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chesterfield this town	**65**	**$13,176**	**$12,060**	**$213**	**1.15**	**2.7%**
Russell peer	73	$25,758	$6,140	$113	1.29	2.4%
Westhampton peer · lowest in class of 30	42	$11,067	$887	$0	0.62	3.3%
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Pelham peer	47	$13,701	$594	$11.86	2.69	2.5%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Chicopee

City · Hampden County · 55,295 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Hampden · Shirley B. Arriaga 78% of residents
6th Hampden · Michael J. Finn 15% of residents
5th Hampden · Patricia A. Duffy 7% of residents

Chicopee is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Hampden · Adam Gómez 56% of residents
Hampden, Hampshire and Worcester · Jacob R. Oliveira 33% of residents
Hampden and Hampshire · John C. Velis 11% of residents

SCHOOL DISTRICTS

Chicopee Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Chicopee scores 62 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

62 / 100

35th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	52	64	69

Rank under other weightings: 24th to 48th.

Stable high: above 55 under every weighting

Chicopee received more than its share of state aid on all four measures; its blended score of 62 stays between 60 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

281st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	18	31	30

Rank under other weightings: 263rd to 301st.

Stable low: below 45 under every weighting

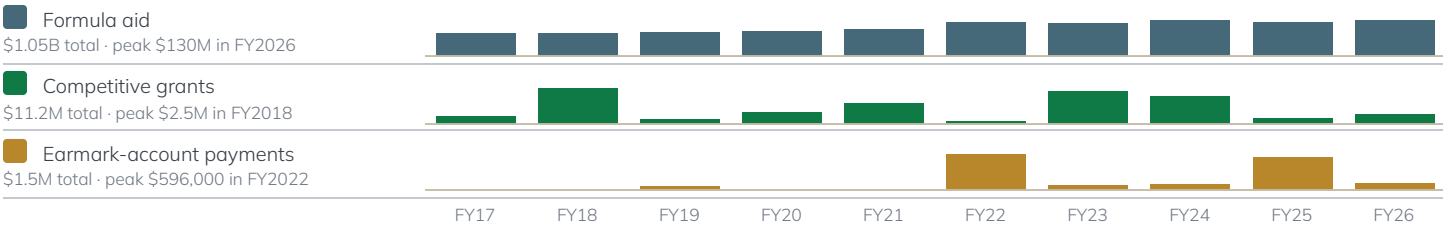
Chicopee received less than its share of discretionary money on all four measures; its blended score of 26 stays between 24 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chicopee's town government and school districts received $1.05 billion in formula aid and $11.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.05B	**$11.2M**	**$1.5M**
$19,031 per resident (34th of 351) · gross	$203 per resident (249th of 351)	$27.41 per resident (159th of 351)

Competitive grants to Chicopee peaked in FY2018 at $2.5 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $37.9 million, are not shown.

EARMARKS

Chicopee received $1.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$1.1M**	**$1.1M**	**Not a member**
$19.30 per resident (267th of 351)	$19.30 per resident (277th of 351)	$19.30 per resident (277th of 351)	35 municipalities had none

Placed in the town: 23 clauses in ten of ten budgets; the most recent in FY2026. Every one names Chicopee directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000 (split two ways)	"as a grant to Urban Impact Initiative Massachusetts Nonprofit Corporation to support organizations and programs in the cities of Springfield and…"	Enacted names the town
FY2025	$83,000 (split three ways)	"Urban Impact Initiative Massachusetts Nonprofit Corporation to support organizations and programs in the cities of Springfield, Chicopee and Holyoke"	Enacted names the town
FY2019	$75,000	"the Westover Road Park and Service Dog Memorial in the city of Chicopee"	Enacted names the town
FY2022	$60,000	"the city of Chicopee for a bulk-item pick up program and a litter and trash pick-up program to help reduce pollution and litter in the community"	Enacted names the town
FY2026	$50,000	"infrastructure improvements and maintenance at the Chicopee council on aging"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Chicopee received 65% of its proportional share of competitive grant awards.

Local road miles **199.2** 15th of 351 · 3.6 per 1,000 residents (295th of 351)	Town-owned bridges, replacement cost **$8.7M** scored exposure $2.8M · one in poor condition	Road-stream crossings **79** 170th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.9 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **55,469** residents plus seasonal	Core infrastructure index **0.09** roads, culverts, dams, coast, flood, energy

Burden index 0.65; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$6,406** FY2017–2025 · 347th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 46.2% of Chicopee's general-fund spending in FY2025, up from 43.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **43.2%** $52M of $121M · median town 14.1%	FY2016 **44.1%** $72.7M of $165M · median town 12.2%	FY2025 **46.2%** $111M of $241M · median town 11.5%	Net of state charges, FY2025 **42.0%** FY2010: 43.8% · median town 10.0%

Chicopee's state aid kept pace with both price measures: FY2025 aid was 38.1% above its FY2006 aid grown by Boston-area consumer prices and 22.8% above grown by the government price index.

Gross state aid went from $52 million in FY2006 to $111 million in FY2025, +114.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+78.8%** $10.9M to $19.5M · all towns +54.0%	All fixed costs, FY2016–25 **+44.2%** $27.3M to $39.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chicopee's health insurance would have been $13.6 million in FY2025; it was $19.5 million, $5.86 million above the path. Its fixed costs would have been $34.1 million in FY2025; it was $39.3 million, $5.26 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chicopee came to $827,000, 9.6% of the $8.57 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$827,000	9.6%	28.2%
Placed in the town	$827,000	9.6%	42.3%
Everything placed	$827,000	9.6%	45.2%

SCHOOLS

Chicopee's required school contribution is 2.4% of median household income, 264th highest of 351.

Chapter 70 aid, FY2026 **$100M** to the town's district	Required local contribution **$36.5M** FY2026
Share of household income **2.4%** 264th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+33%** after inflation

Chicopee runs its own school district.

EXPECTED AND ACTUAL

Chicopee received $12.9 million in earmarks placed in the town and competitive grants over ten years, 52% of the $25 million its size, need and institutions predict.

PEERS

Chicopee ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chicopee this town	**62**	**$19,031**	**$203**	**$19.30**	**0.65**	**2.4%**
Fitchburg peer	68	$22,494	$765	$118	2.33	2.1%
Holyoke peer	78	$31,543	$801	$93.22	1.95	1.7%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Ware lowest in class of 30	61	$18,604	$846	$22.39	1.01	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Chilmark

Town · Dukes County · 1,578 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Martha's Vineyard Regional School District, shared with Aquinnah, Edgartown, Oak Bluffs, Tisbury and West Tisbury

Up-Island Regional School District, shared with Aquinnah and West Tisbury

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

Chilmark scores 33 on the Fairness Index for all state aid and 42 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

280th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	41	34	32

Rank under other weightings: 259th to 295th.

Stable low: below 45 under every weighting

Chilmark received less than its share of state aid on all four measures; its blended score of 33 stays between 30 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

42 / 100

215th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	60	12	51

Rank under other weightings: 188th to 254th.

Weighting-dependent: the range crosses the 45–55 band

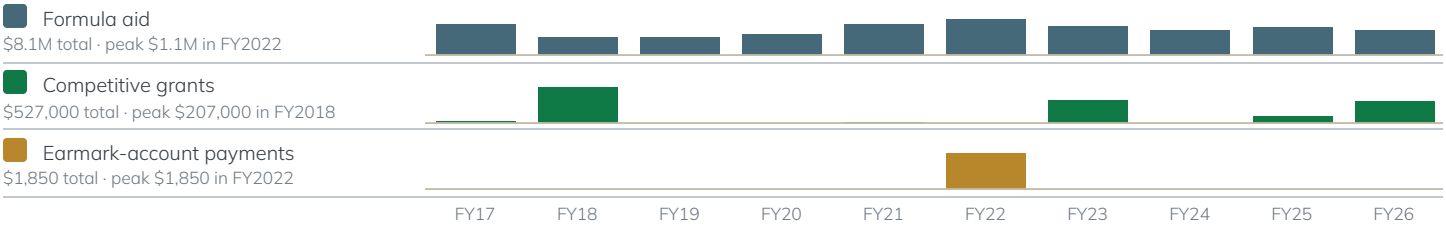
Chilmark received less than its share of discretionary money on two of four measures; its blended score of 42 stays between 33 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

Chilmark's town government and school districts received $8.1 million in formula aid and $527,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$8.1M	**$527,000**	**$1,850**
$5,153 per resident (342nd of 351) · gross	$334 per resident (194th of 351)	$1.17 per resident (324th of 351)

Competitive grants to Chilmark peaked in FY2018 at $207,000, 39% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.7 million, are not shown.

EARMARKS

No local earmark was placed in Chilmark in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $1,850 in payments to Chilmark's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Chilmark.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Chilmark's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
New Marlborough	$0	$0	$0	$0
Monterey	$0	$0	$0	$0
Otis	$0	$0	$0	$0
Truro	$72,000	$222,000	$222,000	$130
West Tisbury	$0	$45,000	$45,000	$14.61

WHAT THE TOWN CARRIES

Measured against what it maintains, Chilmark received 74% of its proportional share of competitive grant awards.

Local road miles **14.1** 348th of 351 · 8.9 per 1,000 residents (120th of 351)	Town-owned bridges, replacement cost **$698,000** scored exposure $134,000 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.0 sq mi** 0% state-owned	Seasonal homes **63%** share of housing units	Peak service population **4,280** residents plus seasonal	Core infrastructure index **0.32** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$205,643** FY2017–2025 · 5th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 0.1% of Chilmark's general-fund spending in FY2025, the same share as in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **0.1%** $8,026 of $6.2M · median town 14.1%	FY2016 **0.1%** $8,691 of $9M · median town 12.2%	FY2025 **0.1%** $11,000 of $15.4M · median town 11.5%	Net of state charges, FY2025 **-1.5%** FY2010: -3.4% · median town 10.0%

Chilmark's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $312,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Chilmark's state aid did not keep pace with either price measure: FY2025 aid was 8.0% below its FY2006 aid grown by Boston-area consumer prices and 18.3% below grown by the government price index.

Gross state aid went from $8,026 in FY2006 to $11,000 in FY2025, +42.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+59.3%** $547,000 to $872,000 · all towns +54.0%	All fixed costs, FY2016–25 **+54.4%** $1.2M to $1.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Chilmark's health insurance would have been $684,000 in FY2025; it was $872,000, $189,000 above the path. Its fixed costs would have been $1.55 million in FY2025; it was $1.92 million, $367,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Chilmark came to $0, 0.0% of the $325,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Chilmark's required school contribution is 1.4% of median household income, 341st highest of 351.

Chapter 70 aid, FY2026 **$356,000** attributed to the town	Required local contribution **$1.3M** FY2026
Share of household income **1.4%** 341st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−2%** after inflation

Chilmark has no school district of its own. Its pupils attend Upisland and Martha's Vineyard; Chilmark accounts for 19% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Chilmark received $1.2 million in earmarks placed in the town and competitive grants over ten years, 31% of the $3.9 million its size, need and institutions predict.

PEERS

Chilmark is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Chilmark this town	**33**	**$5,153**	**$334**	**$0**	**0.74**	**1.4%**
New Marlborough peer · lowest in class of 30	49	$8,719	$3,098	$0	2.06	2.0%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Otis peer	43	$6,679	$2,109	$0	1.01	2.2%
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
West Tisbury peer	52	$11,333	$312	$14.61	0.59	2.5%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Clarksburg

Town · Berkshire County · 1,667 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Clarksburg Public Schools, the town's own district
Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Florida, Lanesborough, Monroe, North Adams, Savoy and Williamstown

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Clarksburg scores 65 on the Fairness Index for all state aid and 75 for discretionary money. Fifty is a fair share.

ALL STATE AID

65 / 100

22nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
68	64	58	70

Rank under other weightings: 20th to 27th.

Stable high: above 55 under every weighting

Clarksburg received more than its share of state aid on all four measures; its blended score of 65 stays between 63 and 67 under every weighting tested.

DISCRETIONARY MONEY ONLY

75 / 100

87th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	73	71	78

Rank under other weightings: 86th to 95th.

Stable high: above 55 under every weighting

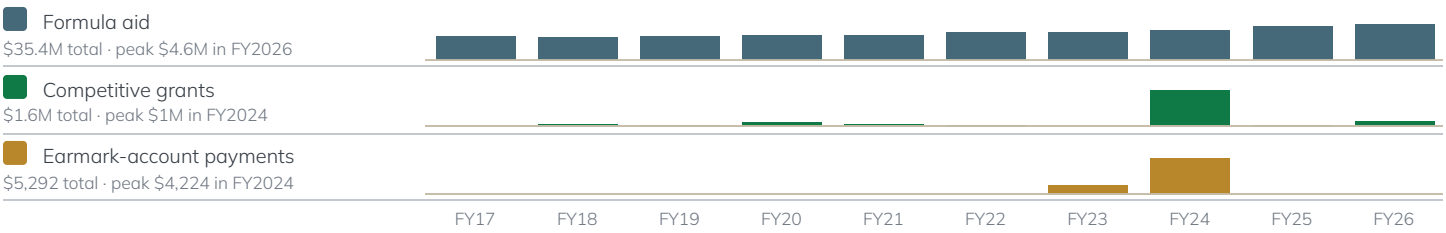
Clarksburg received more than its share of discretionary money on all four measures; its blended score of 75 stays between 73 and 76 under every weighting tested.

STATE MONEY, FY2017–FY2026

Clarksburg's town government and school districts received $35.4 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$35.4M	**$1.6M**	**$5,292**
$21,258 per resident (21st of 351) · gross	$932 per resident (80th of 351)	$3.17 per resident (305th of 351)

Competitive grants to Clarksburg peaked in FY2024 at $1 million, 67% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.3 million, are not shown.

EARMARKS

Clarksburg received $25,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$25,000	**$25,000**	**$25,000**	**Not a member**
$15 per resident (283rd of 351)	$15 per resident (291st of 351)	$15 per resident (292nd of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2018. Every one names Clarksburg directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$25,000	"the Clarksburg Elementary School"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Clarksburg received 3.56 times its proportional share of competitive grant awards.

Local road miles **15.8** 345th of 351 · 9.5 per 1,000 residents (114th of 351)	Town-owned bridges, replacement cost **$8.8M** scored exposure $4.3M · two in poor condition	Road-stream crossings **39** 296th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.7 sq mi** 46% state-owned	Seasonal homes **0%** share of housing units	Peak service population **1,667** residents plus seasonal	Core infrastructure index **3.81** roads, culverts, dams, coast, flood, energy

Burden index 3.56; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,540 acres** 43.6% of land area · FY2026	State-owned land PILOT, FY2026 **$31,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$8.73** statewide $117 · FY2026	New growth per resident **$4,597** FY2017–2025 · 351st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 56.2% of Clarksburg's general-fund spending in FY2025, down from 61.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **61.9%** $1.9M of $3.1M · median town 14.1%	FY2016 **53.5%** $2.3M of $4.4M · median town 12.2%	FY2025 **56.2%** $2.9M of $5.1M · median town 11.5%	Net of state charges, FY2025 **52.4%** FY2010: 57.2% · median town 10.0%

Clarksburg's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $822,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Clarksburg's state aid did not keep pace with either price measure: FY2025 aid was 2.3% below its FY2006 aid grown by Boston-area consumer prices and 13.2% below grown by the government price index.

Gross state aid went from $1.9 million in FY2006 to $2.9 million in FY2025, +51.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–43.4%** $342,000 to $193,000 · all towns +54.0%	All fixed costs, FY2016–25 **–8.7%** $511,000 to $466,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Clarksburg's health insurance would have been $427,000 in FY2025; it was $193,000, $233,000 below the path. Its fixed costs would have been $638,000 in FY2025; it was $466,000, $172,000 below the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (–34%) and FY2022 (+70%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Clarksburg's reported health insurance fell from $342,000 in FY2016 to $193,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	no increase	28.2%
Placed in the town	$25,000	no increase	42.3%
Everything placed	$25,000	no increase	45.2%

SCHOOLS

Clarksburg's required school contribution is 2.1% of

EXPECTED AND ACTUAL

Clarksburg received $1.6 million in earmarks placed in the town and competitive grants over ten years, 41% of the $3.9 million its size, need and institutions predict.

median household income, 302nd highest of 351.

Chapter 70 aid, FY2026 **$3.3M** to the town's district	Required local contribution **$1.2M** FY2026
Share of household income **2.1%** 302nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−10%** after inflation

Clarksburg runs its own school district and also belongs to Northern Berkshire; Clarksburg accounts for 13% of that district's foundation budget.

PEERS

Clarksburg ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Clarksburg this town	**65**	**$21,258**	**$932**	**$15.00**	**3.56**	**2.1%**
Wales peer	59	$16,913	$776	$88.28	0.37	2.1%
Gill peer	40	$9,063	$224	$50.29	0.47	2.3%
Warwick peer	52	$14,769	$2,887	$64.43	2.79	1.7%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Clinton

Town · Worcester County · 15,563 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
12th Worcester · Meghan K. Kilcoyne

STATE SENATE
Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS
Clinton Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Montachusett Regional Planning Commission

FAIRNESS INDEX

Clinton scores 53 on the Fairness Index for all state aid and 45 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

95th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	47	53	59

Rank under other weightings: 77th to 120th.

Weighting-dependent: the range crosses the 45–55 band

Clinton received more than its share of state aid on three of four measures; its blended score of 53 stays between 51 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

45 / 100

201st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	38	50	50

Rank under other weightings: 193rd to 221st.

Weighting-dependent: the range crosses the 45–55 band

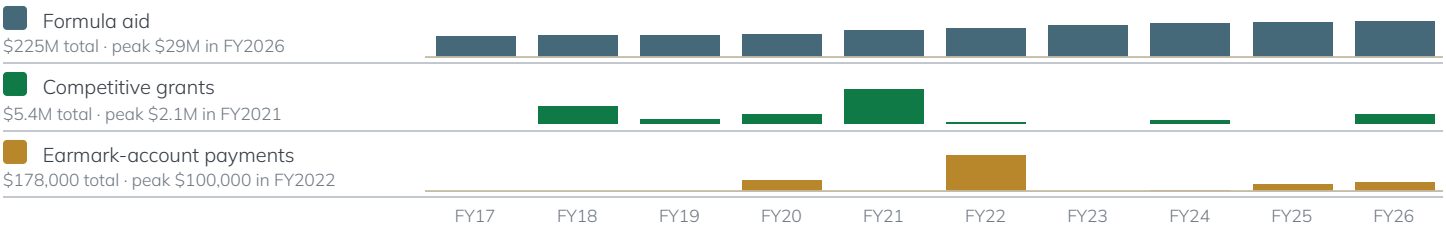
Clinton received less than its share of discretionary money on all four measures; its blended score of 45 stays between 43 and 48 under every weighting tested.

STATE MONEY, FY2017–FY2026

Clinton's town government and school districts received $225 million in formula aid and $5.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$225M	$5.4M	$178,000
$14,443 per resident (86th of 351) · gross	$344 per resident (189th of 351)	$11.41 per resident (251st of 351)

Competitive grants to Clinton peaked in FY2021 at $2.1 million, 39% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16.4 million, are not shown.

EARMARKS

Clinton received $449,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$449,000	$449,000	$449,000	Not a member
$28.88 per resident (234th of 351)	$28.88 per resident (246th of 351)	$28.88 per resident (246th of 351)	35 municipalities had none

Placed in the town: nine clauses in seven of ten budgets; the most recent in FY2026. Every one names Clinton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$85,000	"infrastructure grants to the town of Clinton"	Enacted names the town
FY2025	$80,000	"the town of Clinton for infrastructure upgrades for the Clinton senior center"	Enacted names the town
FY2024	$75,000	"sidewalk repairs and improvements in Depot square in the town of Clinton"	Enacted names the town
FY2019	$50,000	"flood protections in Clinton"	Enacted names the town
FY2019	$40,000	"environmental remediation in Clinton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Clinton received 1.51 times its proportional share of competitive grant awards.

Local road miles **47.8** 263rd of 351 · 3.1 per 1,000 residents (314th of 351)	Town-owned bridges, replacement cost **$7.5M** scored exposure $2.3M · one in poor condition	Road-stream crossings **23** 325th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **5.7 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,577** residents plus seasonal	Core infrastructure index **0.89** roads, culverts, dams, coast, flood, energy

Burden index 1.51; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **16 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$4,542** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$278** statewide $117 · FY2026	New growth per resident **$19,887** FY2017–2025 · 187th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 39.7% of Clinton's general-fund spending in FY2025, down from 43.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **43.5%** $13.2M of $30.4M · median town 14.1%	FY2016 **40.8%** $16.1M of $39.4M · median town 12.2%	FY2025 **39.7%** $24M of $60.5M · median town 11.5%	Net of state charges, FY2025 **36.7%** FY2010: 44.4% · median town 10.0%

Clinton's state aid kept pace with both price measures: FY2025 aid was 17.1% above its FY2006 aid grown by Boston-area consumer prices and 4.1% above grown by the government price index.

Gross state aid went from $13.2 million in FY2006 to $24 million in FY2025, +81.6% in dollars. Flag: in FY2010, $1.3 million of Clinton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+68.5%** $3.4M to $5.7M · all towns +54.0%	All fixed costs, FY2016–25 **+65.0%** $6.5M to $10.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Clinton's health insurance would have been $4.23 million in FY2025; it was $5.70 million, $1.48 million above the path. Its fixed costs would have been $8.17 million in FY2025; it was $10.8 million, $2.62 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Clinton came to $424,000, 18.3% of the $2.32 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$424,000	18.3%	28.2%
Placed in the town	$424,000	18.3%	42.3%
Everything placed	$424,000	18.3%	45.2%

SCHOOLS

Clinton's required school contribution is 2.4% of median household income, 249th highest of 351.

Chapter 70 aid, FY2026 **$21.8M** to the town's district	Required local contribution **$14.7M** FY2026
Share of household income **2.4%** 249th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+28%** after inflation

Clinton runs its own school district.

EXPECTED AND ACTUAL

Clinton received $5.8 million in earmarks placed in the town and competitive grants over ten years, 66% of the $8.8 million its size, need and institutions predict.

PEERS

Clinton ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Clinton this town	**53**	**$14,443**	**$344**	**$28.88**	**1.51**	**2.4%**
Dudley peer	60	$17,447	$442	$36.88	1.55	2.5%
Palmer peer	58	$16,159	$720	$29.88	0.54	2.2%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Webster peer	55	$14,621	$927	$27.75	0.46	2.8%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Cohasset

Town · Norfolk County · 8,427 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Plymouth · Joan Meschino

STATE SENATE

First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS

Cohasset Public Schools, the town's own district

South Shore Regional Vocational Technical School District, vocational, shared with Abington, Hanover, Hanson, Marshfield, Norwell, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Cohasset scores 33 on the Fairness Index for all state aid and 57 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

284th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	53	23	24

Rank under other weightings: 256th to 315th.

Stable low: below 45 under every weighting

Cohasset received less than its share of state aid on three of four measures; its blended score of 33 stays between 27 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

57 / 100

152nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	76	50	48

Rank under other weightings: 135th to 174th.

Weighting-dependent: the range crosses the 45–55 band

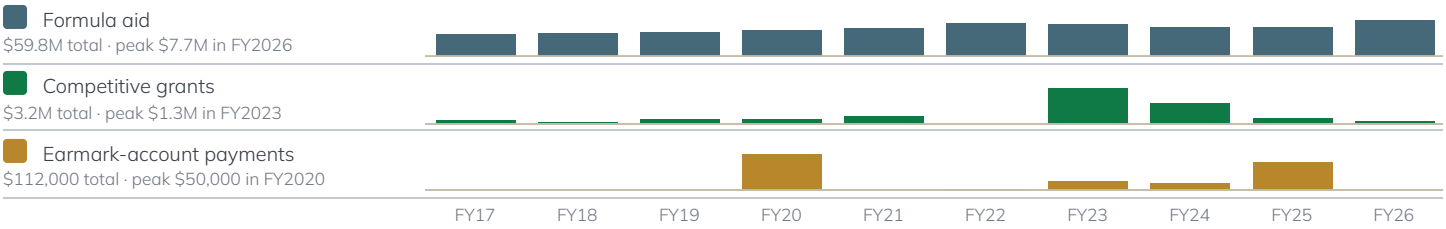
Cohasset received more than its share of discretionary money on two of four measures; its blended score of 57 stays between 52 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Cohasset's town government and school districts received $59.8 million in formula aid and $3.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$59.8M	**$3.2M**	**$112,000**
$7,092 per resident (287th of 351) · gross	$383 per resident (178th of 351)	$13.34 per resident (237th of 351)

Competitive grants to Cohasset peaked in FY2023 at $1.3 million, 40% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.8 million, are not shown.

EARMARKS

Cohasset received $885,000 in local earmarks naming the town, $1.1 million placed in the town and $1.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$885,000	**$1.1M**	**$1.1M**	**Not a member**
$105 per resident (44th of 351)	$129 per resident (43rd of 351)	$129 per resident (48th of 351)	35 municipalities had none

Placed in the town: 15 clauses in seven of ten budgets; the most recent in FY2026. $885,000 came in clauses that name Cohasset; the other $200,000 went to organizations based in Cohasset, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$250,000	"Raising Harts Corporation in the town of Cohasset to support families with autistic children through inclusive programs and mentorship"	Enacted names the town
FY2018	$180,000	"the town of Cohasset for the completion of an accessible 4-bedroom home for clients of the department of developmental services at the Trettis House..."	Enacted names the town
FY2025	$100,000	"the Friends of Jack Foundation, for the purposes of providing healthcare programs and child life specialists in community hospitals"	Enacted recipient based here
FY2024	$100,000	"Raising Harts Corporation in the town of Cohasset to support families with autistic children through inclusive programs and mentorship"	Enacted names the town
FY2024	$100,000	"the Friends of Jack Foundation, Inc., for providing healthcare programs and child life specialists in community hospitals"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Cohasset received 76% of its proportional share of competitive grant awards.

Local road miles **33.7** 319th of 351 · 4.0 per 1,000 residents (278th of 351)	Town-owned bridges, replacement cost **$8.2M** scored exposure $1.5M · none in poor condition	Road-stream crossings **39** 296th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **9.8 sq mi** 14% state-owned	Seasonal homes **2%** share of housing units	Peak service population **8,565** residents plus seasonal	Core infrastructure index **1.06** roads, culverts, dams, coast, flood, energy

Burden index 0.76; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$54,673** FY2017–2025 · 29th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.0% of Cohasset's general-fund spending in FY2025, down from 8.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.7%** $2.6M of $29.5M · median town 14.1%	FY2016 **7.3%** $2.9M of $40.4M · median town 12.2%	FY2025 **7.0%** $3.9M of $55.4M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 3.8% · median town 10.0%

Cohasset's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $33,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Cohasset's state aid did not keep pace with either price measure: FY2025 aid was 3.0% below its FY2006 aid grown by Boston-area consumer prices and 13.8% below grown by the government price index.

Gross state aid went from $2.6 million in FY2006 to $3.9 million in FY2025, +50.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.9%** $4.5M to $6.3M · all towns +54.0%	All fixed costs, FY2016–25 **+61.0%** $6.9M to $11.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Cohasset's health insurance would have been $5.63 million in FY2025; it was $6.31 million, $675,000 above the path. Its fixed costs would have been $8.68 million in FY2025; it was $11.2 million, $2.51 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2023 (+36%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Cohasset came to $855,000, 47.6% of the $1.80 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$855,000	47.6%	28.2%
Placed in the town	$1.1M	58.7%	42.3%
Everything placed	$1.1M	58.7%	45.2%

SCHOOLS

Cohasset's required school contribution is 2.5% of median household income, 216th highest of 351.

Chapter 70 aid, FY2026 **$3.4M** to the town's district	Required local contribution **$15.2M** FY2026
Share of household income **2.5%** 216th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Cohasset runs its own school district and also belongs to South Shore and Norfolk County; Cohasset accounts for 2% and 0% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Cohasset received $4.3 million in earmarks placed in the town and competitive grants over ten years, 94% of the $4.6 million its size, need and institutions predict.

PEERS

Cohasset ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Cohasset this town	**33**	**$7,092**	**$383**	**$129**	**0.76**	**2.5%**
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Newbury peer	41	$8,033	$339	$38.77	0.19	1.6%
Norwell peer	35	$7,878	$687	$57.61	1.24	3.4%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Colrain

Town · Franklin County · 1,627 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mohawk Trail Regional School District, shared with Ashfield, Buckland, Charlemont, Hawley, Heath, Plainfield and Shelburne

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Conway, Deerfield, Erving, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Colrain scores 59 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

48th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	57	56	59

Rank under other weightings: 43rd to 57th.

Stable high: above 55 under every weighting

Colrain received more than its share of state aid on all four measures; its blended score of 59 stays between 58 and 61 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100

25th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	95	91	96

Rank under other weightings: 21st to 28th.

Stable high: above 55 under every weighting

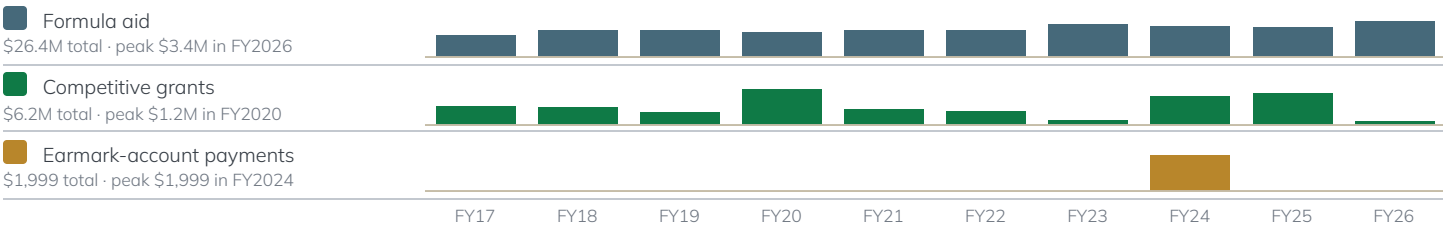
Colrain received more than its share of discretionary money on all four measures; its blended score of 94 stays between 94 and 95 under every weighting tested.

STATE MONEY, FY2017–FY2026

Colrain's town government and school districts received $26.4 million in formula aid and $6.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$26.4M	**$6.2M**	**$1,999**
$16,229 per resident (57th of 351) · gross	$3,795 per resident (24th of 351)	$1.23 per resident (323rd of 351)

Competitive grants to Colrain were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.2 million, are not shown.

EARMARKS

Colrain received $50,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	**$50,000**	**$50,000**	**Not a member**
$30.73 per resident (228th of 351)	$30.73 per resident (239th of 351)	$30.73 per resident (239th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2024. Every one names Colrain directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$50,000	"sewer engineering and interim wastewater management solutions in the town of Colrain"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Colrain received 2.33 times its proportional share of competitive grant awards.

Local road miles **78.1** 164th of 351 · 48.0 per 1,000 residents (28th of 351)	Town-owned bridges, replacement cost **$38M** scored exposure $11.3M · four in poor condition	Road-stream crossings **138** 55th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **43.1 sq mi** 12% state-owned	Seasonal homes **7%** share of housing units	Peak service population **1,745** residents plus seasonal	Core infrastructure index **2.23** roads, culverts, dams, coast, flood, energy

Burden index 2.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,113 acres** 11.3% of land area · FY2026	State-owned land PILOT, FY2026 **$69,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$22.16** statewide $117 · FY2026	New growth per resident **$10,449** FY2017–2025 · 314th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.0% of Colrain's general-fund spending in FY2025, up from 8.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.6%** $274,000 of $3.2M · median town 14.1%	FY2016 **9.0%** $329,000 of $3.6M · median town 12.2%	FY2025 **9.0%** $440,000 of $4.9M · median town 11.5%	Net of state charges, FY2025 **9.0%** FY2010: 9.6% · median town 10.0%

Colrain's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Colrain's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 3.5% above its FY2006 aid grown by Boston-area consumer prices and 8.1% below grown by the government price index.

Gross state aid went from $274,000 in FY2006 to $440,000 in FY2025, +60.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+8.4%** $116,000 to $125,000 · all towns +54.0%	All fixed costs, FY2016–25 **+29.7%** $241,000 to $313,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Colrain's health insurance would have been $144,000 in FY2025; it was $125,000, $19,000 below the path. Its fixed costs would have been $301,000 in FY2025; it was $313,000, $12,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Colrain came to $50,000, 5.1 times the $9,733 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	5.1 times	28.2%
Placed in the town	$50,000	5.1 times	42.3%
Everything placed	$50,000	5.1 times	45.2%

SCHOOLS

Colrain's required school contribution is 2.7% of

EXPECTED AND ACTUAL

Colrain received $6.4 million in earmarks placed in the town and competitive grants over ten years, 48% more than the $4.3 million its size, need and institutions predict.

median household income, 173rd highest of 351.

Chapter 70 aid, FY2026 **$1.8M** attributed to the town	Required local contribution **$1.5M** FY2026
Share of household income **2.7%** 173rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Colrain has no school district of its own. Its pupils attend Mohawk Trail and Franklin County; Colrain accounts for 19% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Colrain ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Colrain this town	**59**	**$16,229**	**$3,795**	**$30.73**	**2.33**	**2.7%**
Huntington peer	63	$18,322	$2,918	$33.78	0.25	2.5%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Royalston peer	59	$15,842	$2,316	$41.10	0.96	1.5%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Concord

Town · Middlesex County · 18,223 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Middlesex · Simon Cataldo 60% of residents
13th Middlesex · Carmine Lawrence Gentile 40% of residents

Concord is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Concord Public Schools, the town's own district
Concord-Carlisle Regional School District, shared with Carlisle
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Dover, Lancaster, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Concord scores 34 on the Fairness Index for all state aid and 28 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

271st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	56	27	20

Rank under other weightings: 233rd to 311th.

Stable low: below 45 under every weighting

Concord received less than its share of state aid on three of four measures; its blended score of 34 stays between 28 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

28 / 100

270th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	49	22	16

Rank under other weightings: 253rd to 293rd.

Stable low: below 45 under every weighting

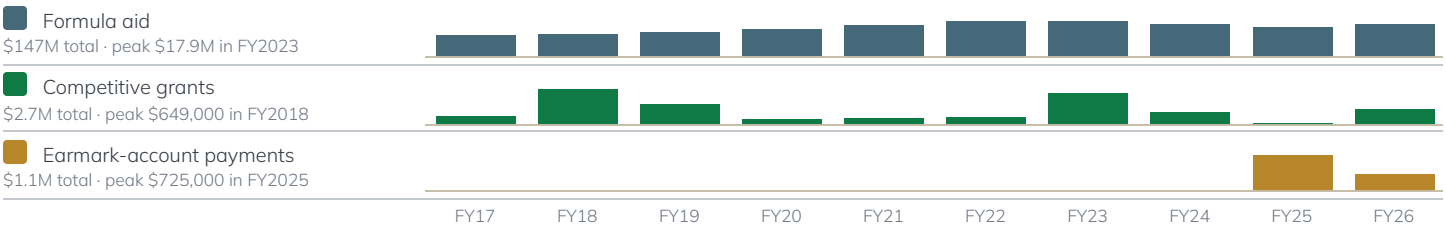
Concord received less than its share of discretionary money on all four measures; its blended score of 28 stays between 23 and 34 under every weighting tested.

STATE MONEY, FY2017–FY2026

Concord's town government and school districts received $147 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$147M	**$2.7M**	**$1.1M**
$8,067 per resident (253rd of 351) · gross	$148 per resident (292nd of 351)	$59.13 per resident (60th of 351)

Competitive grants to Concord peaked in FY2018 at $649,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20 million, are not shown.

EARMARKS

Concord received $1.3 million in local earmarks naming the town, $1.3 million placed in the town and $1.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	**$1.3M**	**$1.5M**	**Not a member**
$72.44 per resident (81st of 351)	$71.06 per resident (110th of 351)	$84.78 per resident (101st of 351)	35 municipalities had none

Placed in the town: 12 clauses in five of ten budgets; the most recent in FY2026. $1.1 million came in clauses that name Concord; the other $225,000 went to organizations based in Concord, some of which serve a wider area.

Names the town includes $250,000 in clauses that name Concord but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $250,000 in one clause for state facilities located in Concord (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$475,000	"the town of Concord for planning the reuse and redevelopment of the former Massachusetts Correctional Institution, Concord"	Enacted names the town
FY2026	$250,000	"the town of Concord for planning the reuse and redevelopment of the former Massachusetts Correctional Institution, Concord"	Enacted names the town
FY2026	$75,000	"Manna Community Kitchen to combat food insecurity and expand their support service for vulnerable populations"	Enacted recipient based here
FY2025	$75,000	"Manna Community Kitchen"	Enacted recipient based here
FY2024	$75,000	"Manna Community Kitchen to combat food insecurity and expand support service for vulnerable populations"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Concord received 61% of its proportional share of competitive grant awards.

Local road miles **105.7** 78th of 351 · 5.8 per 1,000 residents (202nd of 351)	Town-owned bridges, replacement cost **$17.4M** scored exposure $4.8M · none in poor condition	Road-stream crossings **118** 80th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **24.5 sq mi** 3% state-owned	Seasonal homes **2%** share of housing units	Peak service population **18,540** residents plus seasonal	Core infrastructure index **0.95** roads, culverts, dams, coast, flood, energy

Burden index 0.61; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **897 acres** 5.7% of land area · FY2026	State-owned land PILOT, FY2026 **$941,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,048** statewide $117 · FY2026	New growth per resident **$41,788** FY2017–2025 · 52nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.9% of Concord's general-fund spending in FY2025, down from 6.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.0%** $4.2M of $69.8M · median town 14.1%	FY2016 **5.1%** $4.7M of $92.3M · median town 12.2%	FY2025 **4.9%** $6.7M of $138M · median town 11.5%	Net of state charges, FY2025 **4.5%** FY2010: 4.6% · median town 10.0%

Concord's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Concord's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 3.5% above its FY2006 aid grown by Boston-area consumer prices and 8.0% below grown by the government price index.

Gross state aid went from $4.2 million in FY2006 to $6.7 million in FY2025, +60.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+94.8%** $4.1M to $8M · all towns +54.0%	All fixed costs, FY2016–25 **+88.9%** $8.5M to $16.1M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Concord's health insurance would have been $5.13 million in FY2025; it was $8.01 million, $2.87 million above the path. Its fixed costs would have been $10.6 million in FY2025; it was $16.1 million, $5.44 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+50%); health insurance changed by more than 30% in one year in FY2019 (+166%) and FY2020 (–56%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Concord came to $1 million, 26.2% of the $3.90 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1M	26.2%	28.2%
Placed in the town	$920,000	23.6%	42.3%
Everything placed	$1.2M	30.0%	45.2%

SCHOOLS

Concord's required school contribution is 2.5% of median household income, 226th highest of 351.

Chapter 70 aid, FY2026 **$7.4M** to the town's district	Required local contribution **$32.1M** FY2026
Share of household income **2.5%** 226th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Concord runs its own district for some grades and belongs to Concord-Carlisle and Minuteman for others; Concord accounts for 77% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Concord received $4.7 million in earmarks placed in the town and competitive grants over ten years, 39% of the $12.2 million its size, need and institutions predict.

PEERS

Concord ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Concord this town	**34**	**$8,067**	**$148**	**$71.06**	**0.61**	**2.5%**
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Nantucket peer · lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Hopkinton peer	31	$7,048	$297	$94.08	0.33	3.1%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Conway

Town · Franklin County · 1,755 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Conway Public Schools, the town's own district
Frontier Regional School District, shared with Deerfield, Sunderland and Whately
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Deerfield, Erving, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Conway scores 48 on the Fairness Index for all state aid and 38 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

143rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	52	47	42

Rank under other weightings: 132nd to 152nd.

Near fair: between 45 and 55 under every weighting

Conway received less than its share of state aid on three of four measures; its blended score of 48 stays between 46 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

38 / 100

232nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	50	12	40

Rank under other weightings: 213th to 261st.

Stable low: below 45 under every weighting

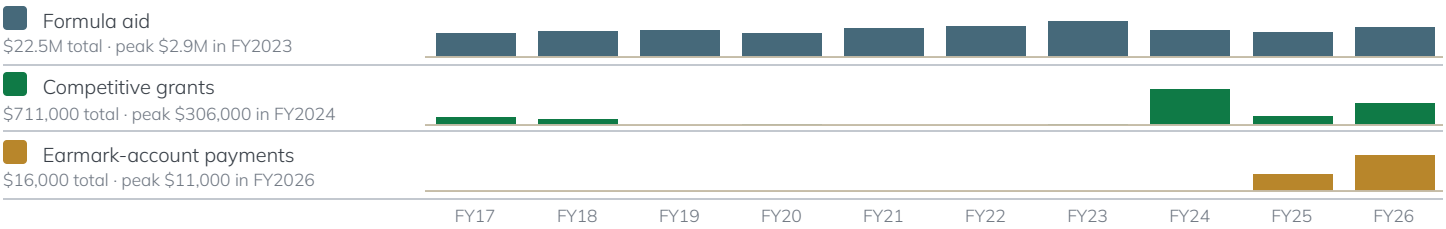
Conway received less than its share of discretionary money on three of four measures; its blended score of 38 stays between 31 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Conway's town government and school districts received $22.5 million in formula aid and $711,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$22.5M	**$711,000**	**$16,000**
$12,799 per resident (115th of 351) · gross	$405 per resident (166th of 351)	$8.93 per resident (265th of 351)

Competitive grants to Conway peaked in FY2024 at $306,000, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

No local earmark was placed in Conway in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $16,000 in payments to Conway's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Conway.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Conway's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Chester	$0	$0	$0	$0
Williamsburg	$10,000	$10,000	$10,000	$3.71
Brimfield	$240,000	$240,000	$240,000	$64.78
Windsor	$25,000	$25,000	$25,000	$23.47
Millville	$360,000	$360,000	$360,000	$114

WHAT THE TOWN CARRIES

Measured against what it maintains, Conway received 68% of its proportional share of competitive grant awards.

Local road miles **63.9** 207th of 351 · 36.4 per 1,000 residents (36th of 351)	Town-owned bridges, replacement cost **$21.9M** scored exposure $7M · 2.5 in poor condition	Road-stream crossings **82** 159th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **37.7 sq mi** 14% state-owned	Seasonal homes **3%** share of housing units	Peak service population **1,804** residents plus seasonal	Core infrastructure index **2.01** roads, culverts, dams, coast, flood, energy

Burden index 0.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,413 acres** 14.1% of land area · FY2026	State-owned land PILOT, FY2026 **$71,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$20.72** statewide $117 · FY2026	New growth per resident **$40,536** FY2017–2025 · 55th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 18.6% of Conway's general-fund spending in FY2025, down from 27.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.5%** $1.2M of $4.3M · median town 14.1%	FY2016 **19.1%** $994,000 of $5.2M · median town 12.2%	FY2025 **18.6%** $1.4M of $7.3M · median town 11.5%	Net of state charges, FY2025 **18.3%** FY2010: 22.1% · median town 10.0%

Conway's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $551,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Conway's state aid did not keep pace with either price measure: FY2025 aid was 25.5% below its FY2006 aid grown by Boston-area consumer prices and 33.8% below grown by the government price index.

Gross state aid went from $1.2 million in FY2006 to $1.4 million in FY2025, +15.6% in dollars. Flag: in FY2010, $211,000 of Conway's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.2%** $348,000 to $505,000 · all towns +54.0%	All fixed costs, FY2016–25 **+72.0%** $531,000 to $913,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Conway's health insurance would have been $434,000 in FY2025; it was $505,000, $71,000 above the path. Its fixed costs would have been $663,000 in FY2025; it was $913,000, $250,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Conway came to $0, 0.0% of the $157,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Conway's required school contribution is 2.5% of median household income, 209th highest of 351.

Chapter 70 aid, FY2026 **$1.1M** to the town's district	Required local contribution **$1.9M** FY2026
Share of household income **2.5%** 209th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Conway runs its own district for some grades and belongs to Frontier and Franklin County for others; Conway accounts for 14% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Conway received $1 million in earmarks placed in the town and competitive grants over ten years, 26% of the $3.9 million its size, need and institutions predict.

PEERS

Conway is one of two municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Conway this town	**48**	**$12,799**	**$405**	**$0**	**0.68**	**2.5%**
Chester peer · lowest in class of 30	61	$16,538	$4,421	$0	2.11	2.4%
Williamsburg peer	41	$9,541	$578	$3.71	1.40	2.2%
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Cummington

Town · Hampshire County · 902 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Hampshire · Lindsay N. Sabadosa	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Central Berkshire Regional School District**, shared with Becket, Dalton, Hinsdale, Peru, Washington and Windsor	Pioneer Valley Planning Commission

FAIRNESS INDEX

Cummington scores 49 on the Fairness Index for all state aid and 95 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

129th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	53	49	45

Rank under other weightings: 118th to 137th.

Near fair: between 45 and 55 under every weighting

Cummington received less than its share of state aid on three of four measures; its blended score of 49 stays between 48 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

95 / 100

21st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	91	95

Rank under other weightings: 19th to 24th.

Stable high: above 55 under every weighting

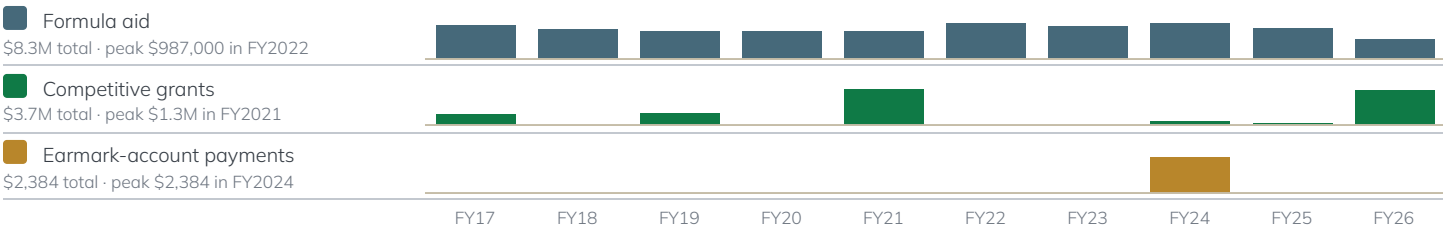
Cummington received more than its share of discretionary money on all four measures; its blended score of 95 stays between 94 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Cummington's town government and school districts received $8.3 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$8.3M	**$3.7M**	**$2,384**
$9,157 per resident (212th of 351) · gross	$4,050 per resident (21st of 351)	$2.64 per resident (308th of 351)

Competitive grants to Cummington peaked in FY2021 at $1.3 million, 36% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 902 residents, a single payment moves Cummington's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $674,000, are not shown.

EARMARKS

No local earmark was placed in Cummington in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,384 in payments to Cummington's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Cummington.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Cummington's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Peru	$25,000	$25,000	$25,000	$39.68
Oakham	$20,000	$20,000	$20,000	$12.20
Windsor	$25,000	$25,000	$25,000	$23.47
Chester	$0	$0	$0	$0
Washington	$50,000	$50,000	$50,000	$95.06

WHAT THE TOWN CARRIES

Measured against what it maintains, Cummington received 1.51 times its proportional share of competitive grant awards.

Local road miles **48.4** 260th of 351 · 53.7 per 1,000 residents (22nd of 351)	Town-owned bridges, replacement cost **$11.1M** scored exposure $4.5M · three in poor condition	Road-stream crossings **46** 279th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.9 sq mi** 16% state-owned	Seasonal homes **3%** share of housing units	Peak service population **929** residents plus seasonal	Core infrastructure index **0.54** roads, culverts, dams, coast, flood, energy

Burden index 1.51; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,254 acres** 15.4% of land area · FY2026	State-owned land PILOT, FY2026 **$101,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$44.59** statewide $117 · FY2026	New growth per resident **$14,085** FY2017–2025 · 267th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.8% of Cummington's general-fund spending in FY2025, up from 7.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.5%** $120,000 of $1.6M · median town 14.1%	FY2016 **10.3%** $200,000 of $1.9M · median town 12.2%	FY2025 **9.8%** $273,000 of $2.8M · median town 11.5%	Net of state charges, FY2025 **9.7%** FY2010: 11.0% · median town 10.0%

Cummington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $124,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Cummington's state aid kept pace with both price measures: FY2025 aid was 46.3% above its FY2006 aid grown by Boston-area consumer prices and 30.0% above grown by the government price index.

Gross state aid went from $120,000 in FY2006 to $273,000 in FY2025, +126.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 **+164.1%** $88,000 to $233,000 · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 5** years it grew faster than allowed levy growth · four years not reported

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Cummington's fixed costs would have been $110,000 in FY2025; it was $233,000, $123,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (+38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Cummington's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	not reported	28.2%
Placed in the town	$0	not reported	42.3%
Everything placed	$0	not reported	45.2%

SCHOOLS

Cummington's required school contribution is 1.5% of median household income, 335th highest of 351.

Chapter 70 aid, FY2026 **$180,000** attributed to the town	Required local contribution **$635,000** FY2026
Share of household income **1.5%** 335th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–24%** after inflation

Cummington has no school district of its own. Its pupils attend Cummington and Central Berkshire; Cummington accounts for 100% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Cummington received $3.8 million in earmarks placed in the town and competitive grants over ten years, 64% more than the $2.3 million its size, need and institutions predict.

PEERS

Cummington is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Cummington this town	**49**	**$9,157**	**$4,050**	**$0**	**1.51**	**1.5%**
Peru peer	61	$22,437	$3,220	$39.68	1.98	2.8%
Oakham peer	61	$18,722	$794	$12.20	1.24	3.2%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Chester peer · lowest in class of 30	61	$16,538	$4,421	$0	2.11	2.4%
Washington peer	56	$15,534	$6,984	$95.06	1.16	2.6%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Dalton

Town · Berkshire County · 6,256 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Central Berkshire Regional School District, shared with Becket, Cummington, Hinsdale, Peru, Washington and Windsor

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Dalton scores 58 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100
58th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	55	57	59

Rank under other weightings: 51st to 68th.

Stable high: above 55 under every weighting

Dalton received more than its share of state aid on all four measures; its blended score of 58 stays between 57 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100
157th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	50	59	55

Rank under other weightings: 149th to 172nd.

Weighting-dependent: the range crosses the 45–55 band

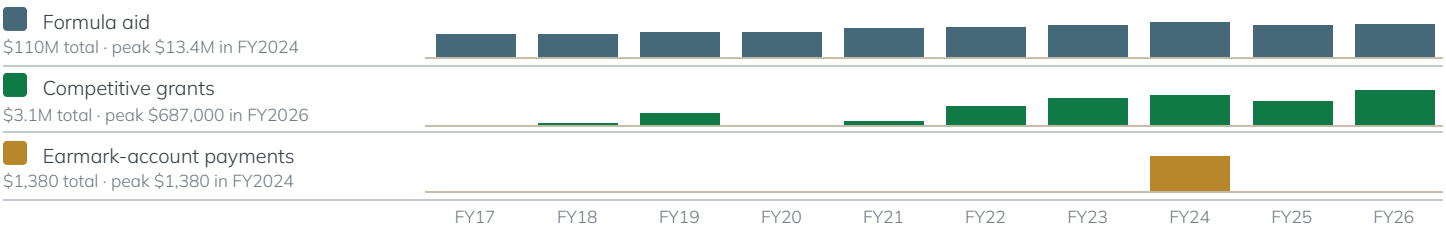
Dalton received more than its share of discretionary money on all four measures; its blended score of 55 stays between 54 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dalton's town government and school districts received $110 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$110M	$3.1M	$1,380
$17,590 per resident (44th of 351) · gross	$490 per resident (140th of 351)	$0.22 per resident (335th of 351)

Competitive grants to Dalton peaked in FY2026 at $687,000, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.7 million, are not shown.

EARMARKS

Dalton received $175,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$175,000	$175,000	$175,000	Not a member
$27.97 per resident (236th of 351)	$27.97 per resident (249th of 351)	$27.97 per resident (250th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Dalton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$75,000	"expanded 2019 novel coronavirus pandemic response activities at the Dalton community recreation association in the town of Dalton"	Enacted names the town
FY2025	$50,000	"Community Recreation Association, Inc. in the town of Dalton"	Enacted names the town
FY2024	$50,000	"the Dalton Community Recreation Association in the town of Dalton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dalton received 1.32 times its proportional share of competitive grant awards.

Local road miles **38.9** 296th of 351 · 6.2 per 1,000 residents (183rd of 351)	Town-owned bridges, replacement cost **$23.2M** scored exposure $8.4M · one in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **21.8 sq mi** 35% state-owned	Seasonal homes **6%** share of housing units	Peak service population **6,659** residents plus seasonal	Core infrastructure index **4.97** roads, culverts, dams, coast, flood, energy

Burden index 1.32; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,416 acres** 31.7% of land area · FY2026	State-owned land PILOT, FY2026 **$92,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$20.84** statewide $117 · FY2026	New growth per resident **$7,722** FY2017–2025 · 342nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.0% of Dalton's general-fund spending in FY2025, down from 10.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.9%** $1.2M of $11.3M · median town 14.1%	FY2016 **10.5%** $1.5M of $14.4M · median town 12.2%	FY2025 **9.0%** $1.8M of $20.3M · median town 11.5%	Net of state charges, FY2025 **8.7%** FY2010: 9.7% · median town 10.0%

Dalton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dalton's state aid did not keep pace with either price measure: FY2025 aid was 5.0% below its FY2006 aid grown by Boston-area consumer prices and 15.6% below grown by the government price index.

Gross state aid went from $1.2 million in FY2006 to $1.8 million in FY2025, +47.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+7.1%** $737,000 to $789,000 · all towns +54.0%	All fixed costs, FY2016–25 **+21.4%** $1.4M to $1.7M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dalton's health insurance would have been $920,000 in FY2025; it was $789,000, $131,000 below the path. Its fixed costs would have been $1.70 million in FY2025; it was $1.65 million, $47,000 below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dalton came to $175,000, 3.4 times the $52,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$175,000	3.4 times	28.2%
Placed in the town	$175,000	3.4 times	42.3%
Everything placed	$175,000	3.4 times	45.2%

SCHOOLS

Dalton's required school contribution is 2.7% of median household income, 143rd highest of 351.

Chapter 70 aid, FY2026 **$7.5M** attributed to the town	Required local contribution **$6.3M** FY2026
Share of household income **2.7%** 143rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

EXPECTED AND ACTUAL

Dalton received $4.1 million in earmarks placed in the town and competitive grants over ten years, 49% of the $8.4 million its size, need and institutions predict.

Dalton has no school district of its own. Its pupils attend Dalton and Central Berkshire; Dalton accounts for 100% and 58% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Dalton ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dalton this town	**58**	**$17,590**	**$490**	**$27.97**	**1.32**	**2.7%**
Barre peer	63	$20,237	$183	$22.43	0.33	2.1%
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Templeton peer	61	$18,577	$420	$27.27	0.60	2.0%
West Brookfield peer	56	$14,082	$1,069	$66.08	1.84	2.6%
North Brookfield peer · lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Danvers

Town · Essex County · 28,098 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
13th Essex · Sally P. Kerans

STATE SENATE
Second Essex · Joan B. Lovely

SCHOOL DISTRICTS
Danvers Public Schools, the town's own district
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Danvers scores 30 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

309th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	36	28	27

Rank under other weightings: 306th to 316th.

Stable low: below 45 under every weighting

Danvers received less than its share of state aid on all four measures; its blended score of 30 stays between 28 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

313th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	26	15	18

Rank under other weightings: 310th to 321st.

Stable low: below 45 under every weighting

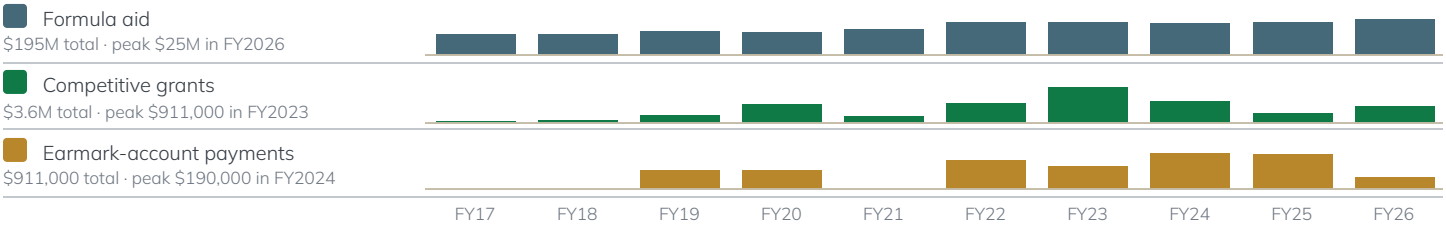
Danvers received less than its share of discretionary money on all four measures; its blended score of 20 stays between 18 and 22 under every weighting tested.

STATE MONEY, FY2017–FY2026

Danvers's town government and school districts received $195 million in formula aid and $3.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$195M	$3.6M	$911,000
$6,947 per resident (293rd of 351) · gross	$129 per resident (304th of 351)	$32.41 per resident (139th of 351)

Competitive grants to Danvers peaked in FY2023 at $911,000, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $34.8 million, are not shown.

EARMARKS

Danvers received $1.1 million in local earmarks naming the town, $1.5 million placed in the town and $1.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	$1.5M	$1.5M	Not a member
$40.01 per resident (186th of 351)	$53.36 per resident (160th of 351)	$53.36 per resident (164th of 351)	35 municipalities had none

Placed in the town: 18 clauses in nine of ten budgets; the most recent in FY2026. $1.1 million came in clauses that name Danvers; the other $375,000 went to organizations based in Danvers, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$150,000	"structural repairs, renovations, and ADA upgrades of restrooms at Endicott park in Danvers"	Enacted names the town
FY2022	$150,000	"parks and recreation improvements in the town of Danvers"	Enacted names the town
FY2026	$100,000	"the town of Danvers for streetscape enhancements, green spaces and pocket parks in Danvers square"	Enacted names the town
FY2026	$100,000	"the Northeastern Massachusetts Law Enforcement Council, Inc"	Enacted recipient based here
FY2023	$100,000	"The Learning Center in the town of Danvers"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Danvers received 20% of its proportional share of competitive grant awards.

Local road miles **106.7** 77th of 351 · 3.8 per 1,000 residents (288th of 351)	Town-owned bridges, replacement cost **$16M** scored exposure $4.2M · none in poor condition	Road-stream crossings **111** 93rd of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **13.3 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **28,302** residents plus seasonal	Core infrastructure index **0.15** roads, culverts, dams, coast, flood, energy

Burden index 0.20; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **107 acres** 1.3% of land area · FY2026	State-owned land PILOT, FY2026 **$487,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$4,571** statewide $117 · FY2026	New growth per resident **$15,357** FY2017–2025 · 246th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.9% of Danvers's general-fund spending in FY2025, down from 11.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.9%** $8.2M of $69M · median town 14.1%	FY2016 **11.3%** $10.2M of $90.6M · median town 12.2%	FY2025 **10.9%** $14M of $128M · median town 11.5%	Net of state charges, FY2025 **9.6%** FY2010: 9.4% · median town 10.0%

Danvers's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Danvers's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 10.4% above its FY2006 aid grown by Boston-area consumer prices and 1.9% below grown by the government price index.

Gross state aid went from $8.2 million in FY2006 to $14 million in FY2025, +71.2% in dollars. Flag: in FY2010, $708,000 of Danvers's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+27.2%** $23M to $29.3M · all towns +54.0%	All fixed costs, FY2016–25 **+45.6%** $16.9M to $24.5M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Danvers's health insurance would have been $28.8 million in FY2025; it was $29.3 million, $544,000 above the path. Its fixed costs would have been $21 million in FY2025; it was $24.5 million, $3.49 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+82%) and FY2018 (–39%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2018, FY2019, FY2020, FY2021, FY2022, FY2023, FY2024 and FY2025 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Danvers came to $974,000, 15.5% of the $6.27 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$974,000	15.5%	28.2%
Placed in the town	$1.2M	19.9%	42.3%
Everything placed	$1.2M	19.9%	45.2%

SCHOOLS

Danvers's required school contribution is 2.9% of median household income, 92nd highest of 351.

Chapter 70 aid, FY2026 **$11.2M** to the town's district	Required local contribution **$40.7M** FY2026
Share of household income **2.9%** 92nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Danvers runs its own school district and also belongs to Essex North Shore; Danvers accounts for 16% of that district's foundation budget.

EXPECTED AND ACTUAL

Danvers received $9.7 million in earmarks placed in the town and competitive grants over ten years, 84% of the $11.5 million its size, need and institutions predict.

PEERS

Danvers ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Danvers this town	**30**	**$6,947**	**$129**	**$53.36**	**0.20**	**2.9%**
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Chelmsford peer	31	$7,630	$194	$41.84	0.37	3.1%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Melrose peer	35	$7,621	$417	$63.68	2.22	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Bedford lowest in class of 30	42	$9,879	$313	$18.33	0.99	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Dartmouth

Town · Bristol County · 33,328 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
9th Bristol · Christopher M. Markey

STATE SENATE
Second Bristol and Plymouth · Mark C. Montigny

SCHOOL DISTRICTS
Dartmouth Public Schools, the town's own district
Greater New Bedford Regional Vocational Technical School District, vocational, shared with Fairhaven and New Bedford

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Dartmouth scores 29 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

315th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	28	31	32

Rank under other weightings: 276th to 335th.

Stable low: below 45 under every weighting

Dartmouth received less than its share of state aid on all four measures; its blended score of 29 stays between 28 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

163rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	56	48	60

Rank under other weightings: 152nd to 171st.

Weighting-dependent: the range crosses the 45–55 band

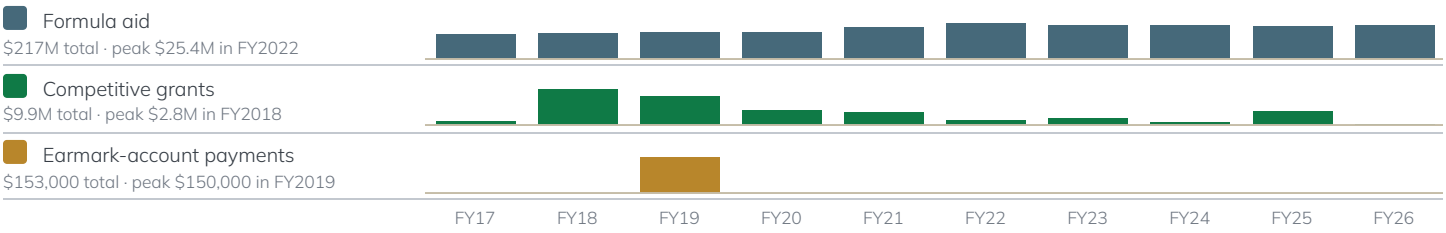
Dartmouth received more than its share of discretionary money on three of four measures; its blended score of 55 stays between 53 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dartmouth's town government and school districts received $217 million in formula aid and $9.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$217M	**$9.9M**	**$153,000**
$6,506 per resident (317th of 351) · gross	$296 per resident (212th of 351)	$4.60 per resident (293rd of 351)

Competitive grants to Dartmouth peaked in FY2018 at $2.8 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $23.8 million, are not shown.

EARMARKS

Dartmouth received $6.1 million in local earmarks naming the town, $5.2 million placed in the town and $7.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$6.1M	**$5.2M**	**$7.1M**	**Not a member**
$183 per resident (9th of 351)	$157 per resident (20th of 351)	$214 per resident (16th of 351)	35 municipalities had none

Placed in the town: 16 clauses in ten of ten budgets; the most recent in FY2026. $5.2 million came in clauses that name Dartmouth; the other $25,000 went to organizations based in Dartmouth, some of which serve a wider area.

Names the town includes $900,000 in clauses that name Dartmouth but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $1.9 million in 23 clauses for state facilities located in Dartmouth (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$575,000	"a program of collaborative research by the division of marine fisheries through the Marine Fisheries Institute, in collaboration with the School for..."	Enacted names the town
FY2025	$575,000	"a program of collaborative research by the division of marine fisheries through the Marine Fisheries Institute, in collaboration with the School for..."	Enacted names the town
FY2024	$550,000	"a program of collaborative research by the division of marine fisheries through the Marine Fisheries Institute, in collaboration with the School for..."	Enacted names the town
FY2023	$550,000	"a program of collaborative research by the division of marine fisheries through the Marine Fisheries Institute, in collaboration with the School for..."	Enacted names the town
FY2022	$550,000	"not less than $ 550,000 shall be expended for a program of collaborative research by the division of marine fisheries through the Marine Fisheries..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dartmouth received 73% of its proportional share of competitive grant awards.

Local road miles **195.3** 18th of 351 · 5.9 per 1,000 residents (195th of 351)	Town-owned bridges, replacement cost **$33M** scored exposure $12.5M · one in poor condition	Road-stream crossings **190** 14th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **60.9 sq mi** 4% state-owned	Seasonal homes **3%** share of housing units	Peak service population **34,394** residents plus seasonal	Core infrastructure index **0.24** roads, culverts, dams, coast, flood, energy

Burden index 0.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,164 acres** 5.5% of land area · FY2026	State-owned land PILOT, FY2026 **$484,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$224** statewide $117 · FY2026	New growth per resident **$18,166** FY2017–2025 · 212th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.4% of Dartmouth's general-fund spending in FY2025, down from 21.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.4%** $13.7M of $64M · median town 14.1%	FY2016 **18.0%** $14.3M of $79.8M · median town 12.2%	FY2025 **14.4%** $15.7M of $109M · median town 11.5%	Net of state charges, FY2025 **13.0%** FY2010: 20.2% · median town 10.0%

Dartmouth's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dartmouth's state aid did not keep pace with either price measure: FY2025 aid was 26.1% below its FY2006 aid grown by Boston-area consumer prices and 34.3% below grown by the government price index.

Gross state aid went from $13.7 million in FY2006 to $15.7 million in FY2025, +14.7% in dollars. Flag: in FY2010, $1.9 million of Dartmouth's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–39.3%** $12.9M to $7.8M · all towns +54.0%	All fixed costs, FY2016–25 **+74.6%** $10M to $17.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dartmouth's health insurance would have been $16.1 million in FY2025; it was $7.81 million, $8.25 million below the path. Its fixed costs would have been $12.5 million in FY2025; it was $17.4 million, $4.96 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (–62%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Dartmouth's reported health insurance fell from $12.9 million in FY2016 to $7.8 million in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$5.3M	no increase	28.2%
Placed in the town	$4.7M	no increase	42.3%
Everything placed	$6.2M	no increase	45.2%

SCHOOLS

Dartmouth's required school contribution is 3.6% of median household income, 15th highest of 351.

Chapter 70 aid, FY2026 **$12.7M** to the town's district	Required local contribution **$44M** FY2026
Share of household income **3.6%** 15th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–1%** after inflation

Dartmouth runs its own school district and also belongs to Greater New Bedford and Bristol County; Dartmouth accounts for 15% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Dartmouth received $15.9 million in earmarks placed in the town and competitive grants over ten years, 49% more than the $10.7 million its size, need and institutions predict.

PEERS

Dartmouth ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dartmouth this town	**29**	**$6,506**	**$296**	**$157**	**0.73**	**3.6%**
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Dedham

Town · Norfolk County · 25,237 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Norfolk · Paul McMurtry

STATE SENATE

Norfolk and Suffolk · Michael F. Rush

SCHOOL DISTRICTS

Dedham Public Schools, the town's own district

Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Holbrook, Milton, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Dedham scores 28 on the Fairness Index for all state aid and 31 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

327th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	35	30	22

Rank under other weightings: 318th to 331st.

Stable low: below 45 under every weighting

Dedham received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

31 / 100

266th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	38	29	26

Rank under other weightings: 262nd to 268th.

Stable low: below 45 under every weighting

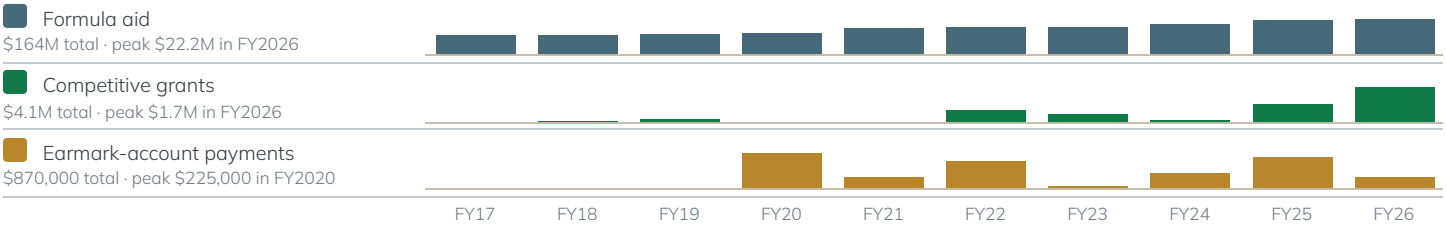
Dedham received less than its share of discretionary money on all four measures; its blended score of 31 stays between 29 and 33 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dedham's town government and school districts received $164 million in formula aid and $4.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$164M	$4.1M	$870,000
$6,510 per resident (316th of 351) · gross	$161 per resident (273rd of 351)	$34.48 per resident (133rd of 351)

Competitive grants to Dedham peaked in FY2026 at $1.7 million, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $32.6 million, are not shown.

EARMARKS

Dedham received $2.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.1M	$2.1M	$2.1M	Not a member
$81.43 per resident (71st of 351)	$81.43 per resident (99th of 351)	$81.43 per resident (105th of 351)	35 municipalities had none

Placed in the town: 24 clauses in ten of ten budgets; the most recent in FY2026. Every one names Dedham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$200,000	"parks and recreation improvements in the town of Dedham"	Enacted names the town
FY2026	$150,000	"the Dedham Museum and Archive for costs associated with modernization"	Enacted names the town
FY2022	$150,000	"the town of Dedham for the construction of a public safety building"	Enacted names the town
FY2020	$150,000	"the restoration of Old Village cemetery in Dedham"	Enacted names the town
FY2022	$125,000	"the construction of green space in the Manor neighborhood in the town of Dedham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dedham received 48% of its proportional share of competitive grant awards.

Local road miles **84.4** 140th of 351 · 3.3 per 1,000 residents (307th of 351)	Town-owned bridges, replacement cost **$24.7M** scored exposure $8.5M · one in poor condition	Road-stream crossings **60** 230th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **10.3 sq mi** 10% state-owned	Seasonal homes **0%** share of housing units	Peak service population **25,340** residents plus seasonal	Core infrastructure index **1.26** roads, culverts, dams, coast, flood, energy

Burden index 0.48; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$20,818** FY2017–2025 · 173rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.4% of Dedham's general-fund spending in FY2025, down from 11.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.2%** $7.4M of $65.9M · median town 14.1%	FY2016 **8.2%** $7.6M of $93.7M · median town 12.2%	FY2025 **10.4%** $14.3M of $138M · median town 11.5%	Net of state charges, FY2025 **7.5%** FY2010: 5.7% · median town 10.0%

Dedham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $637,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dedham's state aid kept pace with both price measures: FY2025 aid was 24.8% above its FY2006 aid grown by Boston-area consumer prices and 11.0% above grown by the government price index.

Gross state aid went from $7.4 million in FY2006 to $14.3 million in FY2025, +93.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.4%** $9.7M to $12.9M · all towns +54.0%	All fixed costs, FY2016–25 **+22.7%** $14.3M to $17.6M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dedham's health insurance would have been $12.2 million in FY2025; it was $12.9 million, $727,000 above the path. Its fixed costs would have been $17.9 million in FY2025; it was $17.6 million, $316,000 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+57%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dedham came to $1.8 million, 58.1% of the $3.15 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$1.8M	58.1%	28.2%
Placed in the town	$1.8M	58.1%	42.3%
Everything placed	$1.8M	58.1%	45.2%

SCHOOLS

Dedham's required school contribution is 2.4% of median household income, 258th highest of 351.

Chapter 70 aid, FY2026 **$10.7M** to the town's district	Required local contribution **$32.7M** FY2026
Share of household income **2.4%** 258th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+60%** after inflation

Dedham runs its own school district and also belongs to Blue Hills and Norfolk County; Dedham accounts for 10% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Dedham received $6.5 million in earmarks placed in the town and competitive grants over ten years, 62% of the $10.4 million its size, need and institutions predict.

PEERS

Dedham ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dedham this town	**28**	**$6,510**	**$161**	**$81.43**	**0.48**	**2.4%**
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Chelmsford peer	31	$7,630	$194	$41.84	0.37	3.1%
Danvers peer	30	$6,947	$129	$53.36	0.20	2.9%
Swampscott peer	28	$6,662	$197	$36.11	1.27	2.8%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Deerfield

Town · Franklin County · 5,158 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Deerfield Public Schools, the town's own district
Frontier Regional School District, shared with Conway, Sunderland and Whately
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Erving, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Deerfield scores 44 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

176th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	42	45	46

Rank under other weightings: 159th to 207th.

Stable low: below 45 under every weighting

Deerfield received less than its share of state aid on all four measures; its blended score of 43 stays between 42 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

68th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	83	74	85

Rank under other weightings: 62nd to 76th.

Stable high: above 55 under every weighting

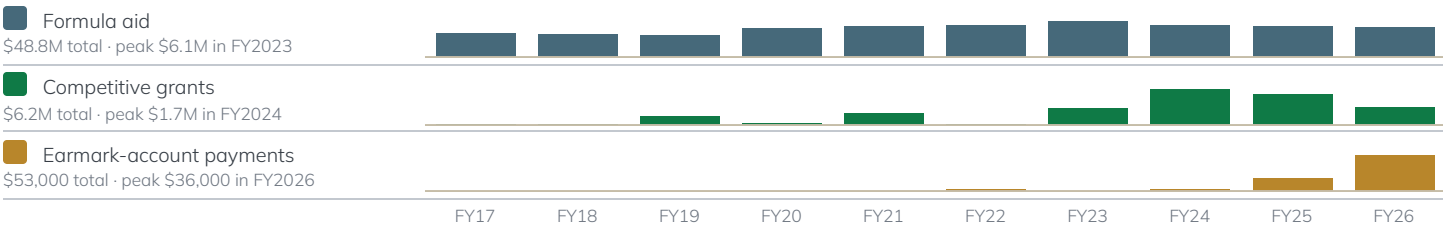
Deerfield received more than its share of discretionary money on all four measures; its blended score of 81 stays between 80 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Deerfield's town government and school districts received $48.8 million in formula aid and $6.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$48.8M	$6.2M	$53,000
$9,461 per resident (195th of 351) · gross	$1,195 per resident (67th of 351)	$10.26 per resident (257th of 351)

Competitive grants to Deerfield peaked in FY2024 at $1.7 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.1 million, are not shown.

EARMARKS

Deerfield received $33,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$33,000	$33,000	$33,000	Not a member
$6.46 per resident (303rd of 351)	$6.46 per resident (311th of 351)	$6.46 per resident (312th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2023. Every one names Deerfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$33,000 (split three ways)	"the town of Deerfield for improvements to the regional senior center in the town that serves the towns of Deerfield, Sunderland and Whately"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Deerfield received 2.83 times its proportional share of competitive grant awards.

Local road miles **77.3** 167th of 351 · 15.0 per 1,000 residents (73rd of 351)	Town-owned bridges, replacement cost **$13.8M** scored exposure $6.2M · one in poor condition	Road-stream crossings **169** 29th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **32.4 sq mi** 7% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,158** residents plus seasonal	Core infrastructure index **0.82** roads, culverts, dams, coast, flood, energy

Burden index 2.83; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,207 acres** 5.8% of land area · FY2026	State-owned land PILOT, FY2026 **$149,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$123** statewide $117 · FY2026	New growth per resident **$21,707** FY2017–2025 · 164th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.5% of Deerfield's general-fund spending in FY2025, down from 19.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **19.5%** $2M of $10.1M · median town 14.1%	FY2016 **17.9%** $2.4M of $13.4M · median town 12.2%	FY2025 **12.5%** $2.3M of $18.5M · median town 11.5%	Net of state charges, FY2025 **10.2%** FY2010: 19.4% · median town 10.0%

Deerfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Deerfield's state aid did not keep pace with either price measure: FY2025 aid was 23.9% below its FY2006 aid grown by Boston-area consumer prices and 32.4% below grown by the government price index.

Gross state aid went from $2 million in FY2006 to $2.3 million in FY2025, +18.0% in dollars. Flag: in FY2010, $300,000 of Deerfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+50.3%** $736,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+56.6%** $1.2M to $1.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Deerfield's health insurance would have been $919,000 in FY2025; it was $1.11 million, $187,000 above the path. Its fixed costs would have been $1.54 million in FY2025; it was $1.93 million, $390,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Deerfield came to $33,000, 9.0% of the $371,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$33,000	9.0%	28.2%
Placed in the town	$33,000	9.0%	42.3%
Everything placed	$33,000	9.0%	45.2%

SCHOOLS

Deerfield's required school contribution is 2.4% of

EXPECTED AND ACTUAL

Deerfield received $7.5 million in earmarks placed in the town and competitive grants over ten years, 28% more than the $5.8 million its size, need and institutions predict.

median household income, 255th highest of 351.

Chapter 70 aid, FY2026 **$2.8M** to the town's district	Required local contribution **$6.1M** FY2026
Share of household income **2.4%** 255th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

Deerfield runs its own district for some grades and belongs to Frontier and Franklin County for others; Deerfield accounts for 47% and 5% of their foundation budgets, in that order.

PEERS

Deerfield ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Deerfield this town	**44**	**$9,461**	**$1,195**	**$6.46**	**2.83**	**2.4%**
Merrimac peer	47	$12,597	$215	$48.54	1.78	2.5%
West Boylston peer	35	$8,612	$157	$148	0.30	3.0%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Northfield peer	52	$12,644	$1,336	$3.48	1.74	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Dennis

Town · Barnstable County · 14,868 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Barnstable · Christopher Richard Flanagan

STATE SENATE
Cape and Islands · Julian Cyr

SCHOOL DISTRICTS
Dennis-Yarmouth Regional School District, shared with Yarmouth
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Eastham, Harwich, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY
Cape Cod Commission

FAIRNESS INDEX

Dennis scores 25 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

25 / 100

345th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	23	29	27

Rank under other weightings: 321st to 346th.

Stable low: below 45 under every weighting

Dennis received less than its share of state aid on all four measures; its blended score of 25 stays between 22 and 27 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100

168th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	57	42	63

Rank under other weightings: 152nd to 190th.

Weighting-dependent: the range crosses the 45–55 band

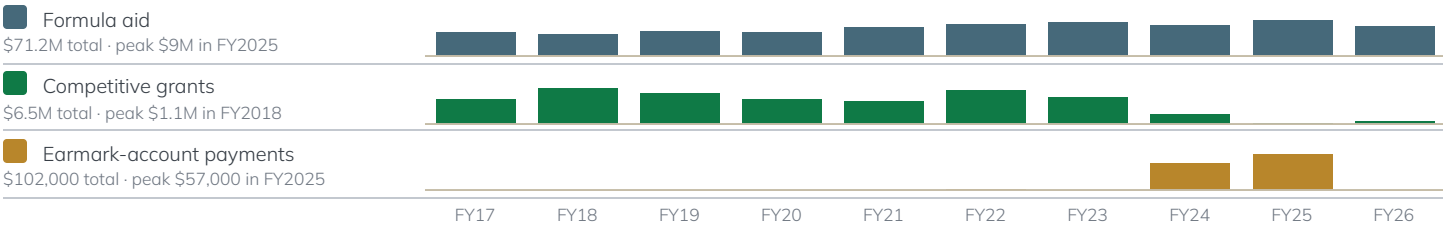
Dennis received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 49 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dennis's town government and school districts received $71.2 million in formula aid and $6.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$71.2M	$6.5M	$102,000
$4,788 per resident (348th of 351) · gross	$436 per resident (157th of 351)	$6.84 per resident (274th of 351)

Competitive grants to Dennis were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $38.6 million, are not shown.

EARMARKS

Dennis received $188,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$188,000	$188,000	$188,000	Not a member
$12.61 per resident (291st of 351)	$12.61 per resident (299th of 351)	$12.61 per resident (300th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2026. Every one names Dennis directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"Harbor Health Services, Inc.'s Ellen Jones Community Dental Center in the South Dennis section in the town of Dennis for the operation and equipping…"	Enacted names the town
FY2026	$25,000 (split two ways)	"Friends of Bass River, Inc. for the purchase and installation of passive filtration culvert inserts and to address the removal of Chesapeake bay…"	Enacted names the town
FY2018	$25,000	"repairs to the Cape Cod Museum of Art in the town of Dennis"	Enacted names the town
FY2018	$25,000	"repairs to the Cape Playhouse in the town of Dennis"	Enacted names the town
FY2025	$12,000 (split two ways)	"the Dennis-Yarmouth regional high school specific to building and instructional needs including funding for vape detectors, supplies for its ADA…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dennis received 90% of its proportional share of competitive grant awards.

Local road miles **149.5** 36th of 351 · 10.1 per 1,000 residents (106th of 351)	Town-owned bridges, replacement cost **$18.5M** scored exposure $5.1M · none in poor condition	Road-stream crossings **24** 323rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.6 sq mi** 0% state-owned	Seasonal homes **52%** share of housing units	Peak service population **30,956** residents plus seasonal	Core infrastructure index **0.98** roads, culverts, dams, coast, flood, energy

Burden index 0.90; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$16,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,972** statewide $117 · FY2026	New growth per resident **$34,460** FY2017–2025 · 83rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.2% of Dennis's general-fund spending in FY2025, down from 2.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.2%** $884,000 of $40.5M · median town 14.1%	FY2016 **1.4%** $732,000 of $52.9M · median town 12.2%	FY2025 **1.2%** $945,000 of $77.2M · median town 11.5%	Net of state charges, FY2025 **-0.2%** FY2010: 0.1% · median town 10.0%

Dennis's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dennis's state aid did not keep pace with either price measure: FY2025 aid was 31.1% below its FY2006 aid grown by Boston-area consumer prices and 38.8% below grown by the government price index.

Gross state aid went from $884,000 in FY2006 to $945,000 in FY2025, +6.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+55.8%** $2.5M to $4M · all towns +54.0%	All fixed costs, FY2016–25 **+66.2%** $5.6M to $9.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dennis's health insurance would have been $3.18 million in FY2025; it was $3.97 million, $788,000 above the path. Its fixed costs would have been $6.96 million in FY2025; it was $9.27 million, $2.30 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dennis came to $162,000, 11.4% of the $1.42 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$162,000	11.4%	28.2%
Placed in the town	$162,000	11.4%	42.3%
Everything placed	$162,000	11.4%	45.2%

SCHOOLS

Dennis's required school contribution is 2.4% of median household income, 246th highest of 351.

Chapter 70 aid, FY2026 **$3.4M** attributed to the town	Required local contribution **$15.7M** FY2026
Share of household income **2.4%** 246th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Dennis has no school district of its own. Its pupils attend Dennis-Yarmouth and Cape Cod; Dennis accounts for 30% and 11% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Dennis received $8.1 million in earmarks placed in the town and competitive grants over ten years, about the $8.5 million its size, need and institutions predict.

PEERS

Dennis ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dennis this town	**25**	**$4,788**	**$436**	**$12.61**	**0.90**	**2.4%**
Bourne peer	30	$6,777	$185	$55.96	0.51	2.9%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Mashpee peer	26	$6,045	$173	$12.51	0.72	2.8%
Westport peer	30	$6,951	$107	$52.17	0.45	3.2%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Dighton

Town · Bristol County · 8,193 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Bristol · Justin Thurber

STATE SENATE

Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS

Dighton-Rehoboth Regional School District, shared with Rehoboth
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Freetown, Middleborough, Raynham, Rehoboth and Taunton

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Dighton scores 56 on the Fairness Index for all state aid and 32 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

68th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	65	50	54

Rank under other weightings: 55th to 88th.

Weighting-dependent: the range crosses the 45–55 band

Dighton received more than its share of state aid on all four measures; its blended score of 56 stays between 54 and 59 under every weighting tested.

DISCRETIONARY MONEY ONLY

32 / 100

259th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	39	30	29

Rank under other weightings: 253rd to 262nd.

Stable low: below 45 under every weighting

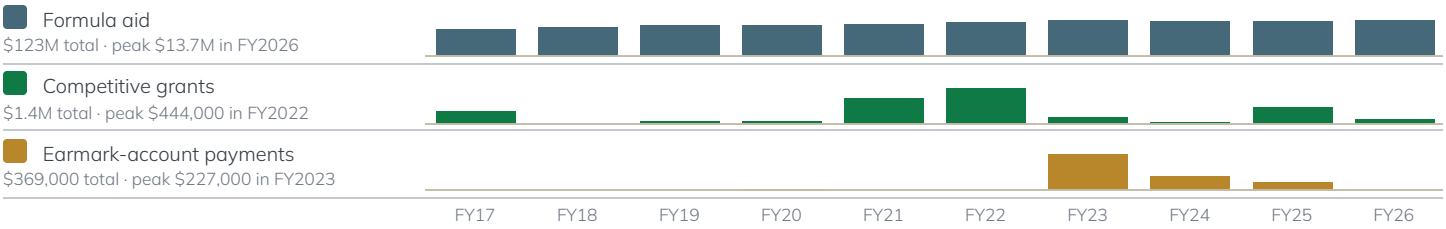
Dighton received less than its share of discretionary money on all four measures; its blended score of 32 stays between 31 and 34 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dighton's town government and school districts received $123 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$123M	**$1.4M**	**$369,000**
$15,030 per resident (73rd of 351) · gross	$168 per resident (269th of 351)	$45.06 per resident (89th of 351)

Competitive grants to Dighton peaked in FY2022 at $444,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

Dighton received $630,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$630,000	**$630,000**	**$630,000**	**Not a member**
$76.89 per resident (76th of 351)	$76.89 per resident (103rd of 351)	$76.89 per resident (109th of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2025. Every one names Dighton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"building refurbishments for the library in the town of Dighton"	Enacted names the town
FY2024	$175,000	"the Dighton public library to purchase fixtures, furnishings, equipment and books without censorship"	Enacted names the town
FY2025	$100,000	"the town of Dighton to match federal funds received for the engineering and design of the pleasant street bridge project"	Enacted names the town
FY2019	$100,000	"the Massachusetts Food Trust Program"	Enacted names the town
FY2017	$25,000	"improve services and facilities at the Dighton Animal Shelter in the town of Dighton which shall not be used for administrative purposes"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dighton received 53% of its proportional share of competitive grant awards.

Local road miles **60.2** 216th of 351 · 7.3 per 1,000 residents (149th of 351)	Town-owned bridges, replacement cost **$17.1M** scored exposure $5.1M · one in poor condition	Road-stream crossings **71** 194th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.0 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,193** residents plus seasonal	Core infrastructure index **0.56** roads, culverts, dams, coast, flood, energy

Burden index 0.53; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **55 acres** 0.4% of land area · FY2026	State-owned land PILOT, FY2026 **$8,146** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$147** statewide $117 · FY2026	New growth per resident **$23,884** FY2017–2025 · 144th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.8% of Dighton's general-fund spending in FY2025, down from 6.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.6%** $771,000 of $11.7M · median town 14.1%	FY2016 **5.0%** $826,000 of $16.7M · median town 12.2%	FY2025 **3.8%** $1M of $27.8M · median town 11.5%	Net of state charges, FY2025 **3.0%** FY2010: 4.9% · median town 10.0%

Dighton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $10.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dighton's state aid did not keep pace with either price measure: FY2025 aid was 12.9% below its FY2006 aid grown by Boston-area consumer prices and 22.6% below grown by the government price index.

Gross state aid went from $771,000 in FY2006 to $1 million in FY2025, +35.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+84.3%** $607,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+78.9%** $1.4M to $2.6M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dighton's health insurance would have been $757,000 in FY2025; it was $1.12 million, $360,000 above the path. Its fixed costs would have been $1.79 million in FY2025; it was $2.57 million, $775,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dighton came to $630,000, 123.2% of the $511,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$630,000	123.2%	28.2%
Placed in the town	$630,000	123.2%	42.3%
Everything placed	$630,000	123.2%	45.2%

SCHOOLS

Dighton's required school contribution is 2.4% of median household income, 247th highest of 351.

Chapter 70 aid, FY2026 **$9.7M** attributed to the town	Required local contribution **$9.8M** FY2026
Share of household income **2.4%** 247th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Dighton has no school district of its own. Its pupils attend Dighton, Dighton-Rehoboth, Bristol Plymouth and Bristol County; Dighton accounts for 100%, 43%, 7% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Dighton received $2 million in earmarks placed in the town and competitive grants over ten years, 50% of the $4.1 million its size, need and institutions predict.

PEERS

Dighton ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dighton this town	**56**	**$15,030**	**$168**	**$76.89**	**0.53**	**2.4%**
Hanson peer	51	$12,622	$231	$52.67	0.66	2.6%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Groveland peer	52	$13,007	$476	$36.55	0.95	2.5%
Millis peer	39	$9,221	$150	$151	0.75	2.6%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Douglas

Town · Worcester County · 9,207 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
18th Worcester · Joseph D. McKenna

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Douglas Public Schools, the town's own district
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Grafton, Hopedale, Mendon, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Douglas scores 58 on the Fairness Index for all state aid and 67 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100

59th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	64	54	58

Rank under other weightings: 44th to 70th.

Stable high: above 55 under every weighting

Douglas received more than its share of state aid on all four measures; its blended score of 58 stays between 56 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

67 / 100

121st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	70	68	65

Rank under other weightings: 115th to 127th.

Stable high: above 55 under every weighting

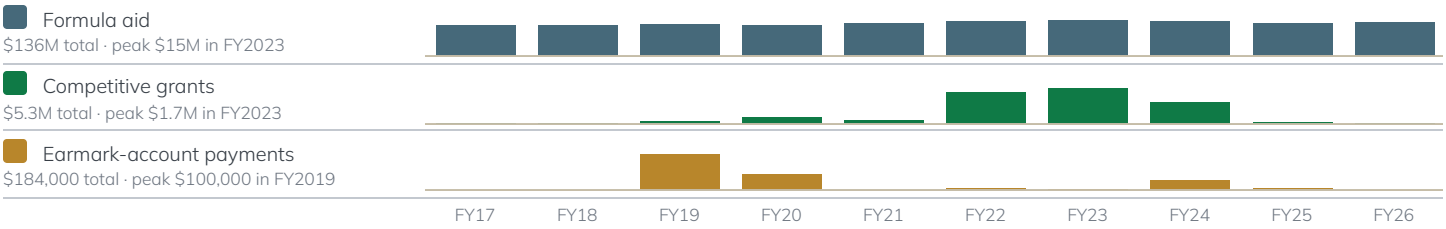
Douglas received more than its share of discretionary money on all four measures; its blended score of 67 stays between 65 and 68 under every weighting tested.

STATE MONEY, FY2017–FY2026

Douglas's town government and school districts received $136 million in formula aid and $5.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$136M	**$5.3M**	**$184,000**
$14,824 per resident (75th of 351) · gross	$571 per resident (128th of 351)	$19.95 per resident (205th of 351)

Competitive grants to Douglas peaked in FY2023 at $1.7 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.2 million, are not shown.

EARMARKS

Douglas received $265,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$265,000	**$265,000**	**$265,000**	**Not a member**
$28.78 per resident (235th of 351)	$28.78 per resident (248th of 351)	$28.78 per resident (249th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names Douglas directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"the purchase of a new emergency services vehicle for the town of Douglas"	Enacted names the town
FY2020	$45,000	"technology upgrades for the Douglas school district in the town of Douglas"	Enacted names the town
FY2024	$30,000	"the purchase of a transport van for the senior center in the town of Douglas"	Enacted names the town
FY2023	$25,000	"designing and building a new municipal department of public works barn in Douglas"	Enacted names the town
FY2022	$25,000	"the Douglas adult social center in the town of Douglas for improvements to its facility"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Douglas received 1.44 times its proportional share of competitive grant awards.

Local road miles **76.2** 171st of 351 · 8.3 per 1,000 residents (133rd of 351)	Town-owned bridges, replacement cost **$10.1M** scored exposure $3.3M · one in poor condition	Road-stream crossings **131** 62nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **36.4 sq mi** 26% state-owned	Seasonal homes **4%** share of housing units	Peak service population **9,573** residents plus seasonal	Core infrastructure index **0.42** roads, culverts, dams, coast, flood, energy

Burden index 1.44; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,926 acres** 25.4% of land area · FY2026	State-owned land PILOT, FY2026 **$389,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$65.59** statewide $117 · FY2026	New growth per resident **$35,310** FY2017–2025 · 80th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 29.4% of Douglas's general-fund spending in FY2025, down from 38.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **38.8%** $7.9M of $20.3M · median town 14.1%	FY2016 **39.1%** $10.2M of $26.1M · median town 12.2%	FY2025 **29.4%** $11.1M of $37.7M · median town 11.5%	Net of state charges, FY2025 **28.4%** FY2010: 43.5% · median town 10.0%

Douglas's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $950,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Douglas's state aid did not keep pace with either price measure: FY2025 aid was 9.6% below its FY2006 aid grown by Boston-area consumer prices and 19.6% below grown by the government price index.

Gross state aid went from $7.9 million in FY2006 to $11.1 million in FY2025, +40.2% in dollars. Flag: in FY2010, $516,000 of Douglas's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+0.8%** $2.4M to $2.4M · all towns +54.0%	All fixed costs, FY2016–25 **+43.4%** $3.7M to $5.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Douglas's health insurance would have been $2.97 million in FY2025; it was $2.40 million, $574,000 below the path. Its fixed costs would have been $4.58 million in FY2025; it was $5.26 million, $680,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Douglas came to $245,000, 13.1 times the $19,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$245,000	13.1 times	28.2%
Placed in the town	$245,000	13.1 times	42.3%
Everything placed	$245,000	13.1 times	45.2%

SCHOOLS

Douglas's required school contribution is 2.2% of median household income, 293rd highest of 351.

Chapter 70 aid, FY2026 **$10.1M** to the town's district	Required local contribution **$11M** FY2026
Share of household income **2.2%** 293rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–0%** after inflation

Douglas runs its own school district and also belongs to Blackstone Valley; Douglas accounts for 10% of that district's foundation budget.

EXPECTED AND ACTUAL

Douglas received $5.6 million in earmarks placed in the town and competitive grants over ten years, 46% more than the $3.8 million its size, need and institutions predict.

PEERS

Douglas ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Douglas this town	**58**	**$14,824**	**$571**	**$28.78**	**1.44**	**2.2%**
Sturbridge peer	51	$13,598	$158	$56.22	0.74	2.5%
Halifax peer · best in class of 30	48	$12,543	$155	$155	0.34	2.6%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Williamsburg lowest in class of 30	41	$9,541	$578	$3.71	1.40	2.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Dover

Town · Norfolk County · 5,930 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Norfolk · Joshua Tarsky

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Dover Public Schools, the town's own district
Dover-Sherborn Regional School District, shared with Sherborn
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Concord, Lancaster, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Dover scores 37 on the Fairness Index for all state aid and 36 for discretionary money. Fifty is a fair share.

ALL STATE AID

37 / 100

247th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	62	25	27

Rank under other weightings: 187th to 280th.

Stable low: below 45 under every weighting

Dover received less than its share of state aid on three of four measures; its blended score of 37 stays between 30 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

36 / 100

243rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	57	33	23

Rank under other weightings: 220th to 261st.

Stable low: below 45 under every weighting

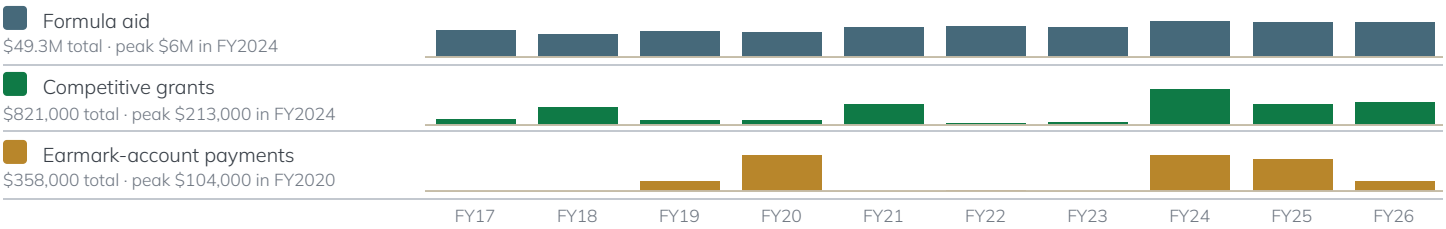
Dover received less than its share of discretionary money on three of four measures; its blended score of 36 stays between 30 and 41 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dover's town government and school districts received $49.3 million in formula aid and $821,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$49.3M	**$821,000**	**$358,000**
$8,305 per resident (241st of 351) · gross	$138 per resident (300th of 351)	$60.34 per resident (55th of 351)

Competitive grants to Dover peaked in FY2024 at $213,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.8 million, are not shown.

EARMARKS

Dover received $591,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$591,000	**$591,000**	**$591,000**	**Not a member**
$99.67 per resident (52nd of 351)	$99.67 per resident (70th of 351)	$99.67 per resident (80th of 351)	35 municipalities had none

Placed in the town: 11 clauses in eight of ten budgets; the most recent in FY2026. Every one names Dover directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$150,000	"the town of Dover for the improvement and modernization of town cybersecurity and information technology infrastructure"	Enacted names the town
FY2020	$104,000	"the town of Dover fire department for safety equipment"	Enacted names the town
FY2024	$75,000	"fire department safety gear in the town of Dover"	Enacted names the town
FY2022	$75,000	"the town of Dover for a water resource consultant"	Enacted names the town
FY2024	$40,000	"the design and permitting of the Claybrook road culvert at Trout brook in the town of Dover"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dover received 1.08 times its proportional share of competitive grant awards.

Local road miles **59.6** 217th of 351 · 10.0 per 1,000 residents (107th of 351)	Town-owned bridges, replacement cost **$6M** scored exposure $910,000 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.1 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,930** residents plus seasonal	Core infrastructure index **0.92** roads, culverts, dams, coast, flood, energy

Burden index 1.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **122 acres** 1.3% of land area · FY2026	State-owned land PILOT, FY2026 **$99,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$816** statewide $117 · FY2026	New growth per resident **$46,862** FY2017–2025 · 41st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.3% of Dover's general-fund spending in FY2025, down from 6.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.5%** $1.5M of $22.9M · median town 14.1%	FY2016 **4.6%** $1.5M of $32.4M · median town 12.2%	FY2025 **3.3%** $1.4M of $43.6M · median town 11.5%	Net of state charges, FY2025 **2.5%** FY2010: 5.4% · median town 10.0%

Dover's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dover's state aid did not keep pace with either price measure: FY2025 aid was 37.8% below its FY2006 aid grown by Boston-area consumer prices and 44.7% below grown by the government price index.

Gross state aid went from $1.5 million in FY2006 to $1.4 million in FY2025, −3.6% in dollars. Flag: in FY2010, $786,000 of Dover's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+16.1%** $1.9M to $2.2M · all towns +54.0%	All fixed costs, FY2016–25 **+36.8%** $3.2M to $4.4M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dover's health insurance would have been $2.31 million in FY2025; it was $2.15 million, $163,000 below the path. Its fixed costs would have been $4.03 million in FY2025; it was $4.42 million, $385,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dover came to $566,000, 189.8% of the $298,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$566,000	189.8%	28.2%
Placed in the town	$566,000	189.8%	42.3%
Everything placed	$566,000	189.8%	45.2%

SCHOOLS

Dover's required school contribution is 2.4% of median household income, 244th highest of 351.

Chapter 70 aid, FY2026 **$2.7M** to the town's district	Required local contribution **$11.7M** FY2026
Share of household income **2.4%** 244th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+20%** after inflation

Dover runs its own district for some grades and belongs to Dover-Sherborn, Minuteman and Norfolk County for others; Dover accounts for 53%, 1% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Dover received $1.4 million in earmarks placed in the town and competitive grants over ten years, 53% of the $2.7 million its size, need and institutions predict.

PEERS

Dover ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dover this town	**37**	**$8,305**	**$138**	**$99.67**	**1.08**	**2.4%**
Manchester-by-the-Sea peer	34	$6,434	$696	$60.01	2.44	1.6%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
West Tisbury peer	52	$11,333	$312	$14.61	0.59	2.5%
Weston peer	35	$8,400	$37.49	$87.66	0.21	2.4%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Chilmark lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Dracut

Town · Middlesex County · 32,574 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

36th Middlesex · Colleen M. Garry

STATE SENATE

First Middlesex · Vanna Howard (since March 2026) and Edward J. Kennedy (until October 2025)

SCHOOL DISTRICTS

Dracut Public Schools, the town's own district

Greater Lowell Regional Vocational Technical School District, vocational, shared with Dunstable, Lowell and Tyngsborough

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Dracut scores 46 on the Fairness Index for all state aid and 19 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

152nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	45	46	49

Rank under other weightings: 138th to 166th.

Near fair: between 45 and 55 under every weighting

Dracut received less than its share of state aid on all four measures; its blended score of 46 stays between 46 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

19 / 100

316th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
17	16	24	19

Rank under other weightings: 307th to 325th.

Stable low: below 45 under every weighting

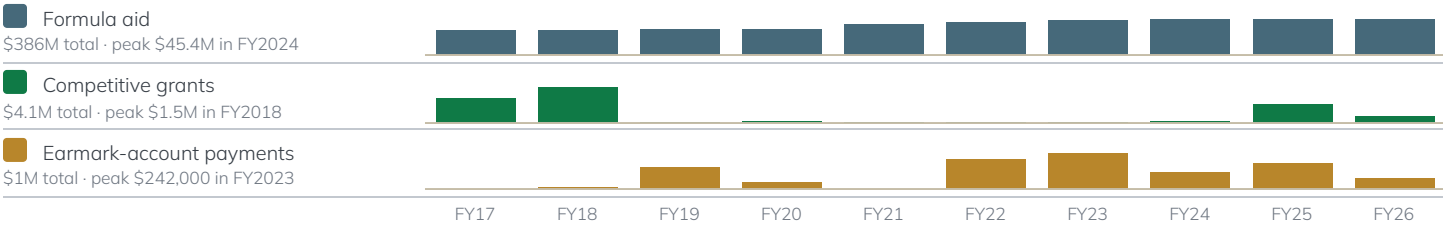
Dracut received less than its share of discretionary money on all four measures; its blended score of 19 stays between 18 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dracut's town government and school districts received $386 million in formula aid and $4.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$386M	$4.1M	$1M
$11,847 per resident (132nd of 351) · gross	$125 per resident (305th of 351)	$31.29 per resident (144th of 351)

Competitive grants to Dracut peaked in FY2018 at $1.5 million, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $15.8 million, are not shown.

EARMARKS

Dracut received $1 million in local earmarks naming the town, $1.7 million placed in the town and $1.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1M	$1.7M	$1.7M	Not a member
$32.12 per resident (217th of 351)	$51.31 per resident (167th of 351)	$51.31 per resident (172nd of 351)	35 municipalities had none

Placed in the town: 22 clauses in ten of ten budgets; the most recent in FY2026. $1 million came in clauses that name Dracut; the other $625,000 went to organizations based in Dracut, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$375,000	"Catie's Closet, Inc. to provide students in kindergarten to grade 12, inclusive, in schools located in the Merrimack valley region with a high…"	Enacted recipient based here
FY2026	$250,000	"Catie's Closet, Inc. to provide students in kindergarten to grade 12, inclusive, in schools with a high percentage of low-income and homeless…"	Enacted recipient based here
FY2025	$100,000	"necessary safety equipment and repair of facilities of the Dracut fire department"	Enacted names the town
FY2019	$100,000	"the town of Dracut for improvements to public safety"	Enacted names the town
FY2018	$100,000	"the town of Dracut for communications tower replacement for Marsh Hill"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dracut received 50% of its proportional share of competitive grant awards.

Local road miles **144.0** 38th of 351 · 4.4 per 1,000 residents (264th of 351)	Town-owned bridges, replacement cost **$13M** scored exposure $4.5M · none in poor condition	Road-stream crossings **109** 101st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.7 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **32,622** residents plus seasonal	Core infrastructure index **0.90** roads, culverts, dams, coast, flood, energy

Burden index 0.50; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **189 acres** 1.4% of land area · FY2026	State-owned land PILOT, FY2026 **$81,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$429** statewide $117 · FY2026	New growth per resident **$10,987** FY2017–2025 · 306th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 32.3% of Dracut's general-fund spending in FY2025, down from 37.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **37.0%** $20.4M of $55.1M · median town 14.1%	FY2016 **33.4%** $24.7M of $74M · median town 12.2%	FY2025 **32.3%** $32.8M of $102M · median town 11.5%	Net of state charges, FY2025 **28.2%** FY2010: 34.4% · median town 10.0%

Dracut's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dracut's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 3.8% above its FY2006 aid grown by Boston-area consumer prices and 7.7% below grown by the government price index.

Gross state aid went from $20.4 million in FY2006 to $32.8 million in FY2025, +61.0% in dollars. Flag: in FY2010, $1.4 million of Dracut's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.9%** $8.8M to $11.8M · all towns +54.0%	All fixed costs, FY2016–25 **+50.0%** $14M to $21M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dracut's health insurance would have been $11 million in FY2025; it was $11.8 million, $798,000 above the path. Its fixed costs would have been $17.5 million in FY2025; it was $21 million, $3.52 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dracut came to $921,000, 30.8% of the $2.99 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$921,000	30.8%	28.2%
Placed in the town	$1.3M	43.4%	42.3%
Everything placed	$1.3M	43.4%	45.2%

SCHOOLS

Dracut's required school contribution is 2.5% of median household income, 214th highest of 351.

Chapter 70 aid, FY2026 **$34.3M** to the town's district	Required local contribution **$35.3M** FY2026
Share of household income **2.5%** 214th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Dracut runs its own school district and also belongs to Greater Lowell; Dracut accounts for 23% of that district's foundation budget.

EXPECTED AND ACTUAL

Dracut received $6.8 million in earmarks placed in the town and competitive grants over ten years, 78% of the $8.7 million its size, need and institutions predict.

PEERS

Dracut ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dracut this town	**46**	**$11,847**	**$125**	**$51.31**	**0.50**	**2.5%**
Middleborough peer	45	$12,235	$110	$13.47	0.78	2.8%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Methuen peer	56	$15,084	$205	$59.13	0.39	2.6%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Dudley

Town · Worcester County · 11,929 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
6th Worcester · John J. Marsi

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Dudley-Charlton Regional School District, shared with Charlton
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, North Brookfield, Oxford, Paxton, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Dudley scores 60 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

60 / 100

45th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	54	59	66

Rank under other weightings: 38th to 56th.

Stable high: above 55 under every weighting

Dudley received more than its share of state aid on all four measures; its blended score of 60 stays between 58 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

174th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	46	52	58

Rank under other weightings: 162nd to 182nd.

Near fair: between 45 and 55 under every weighting

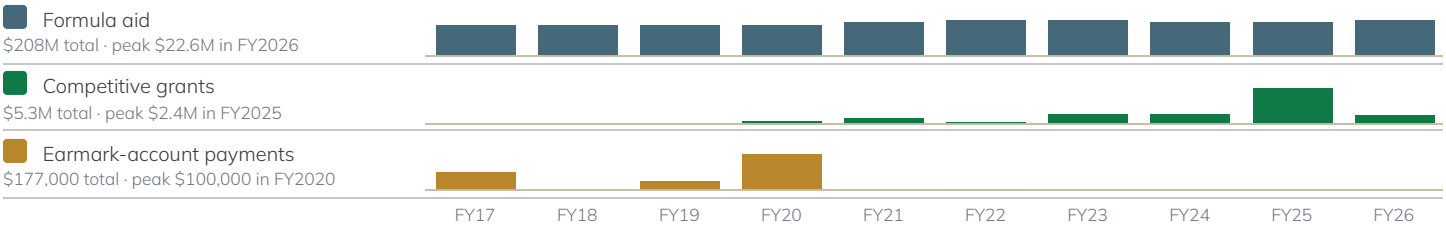
Dudley received more than its share of discretionary money on three of four measures; its blended score of 52 stays between 50 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dudley's town government and school districts received $208 million in formula aid and $5.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$208M	$5.3M	$177,000
$17,447 per resident (46th of 351) · gross	$442 per resident (155th of 351)	$14.87 per resident (230th of 351)

Competitive grants to Dudley peaked in FY2025 at $2.4 million, 46% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.9 million, are not shown.

EARMARKS

Dudley received $290,000 in local earmarks naming the town, $440,000 placed in the town and $440,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$290,000	$440,000	$440,000	Not a member
$24.31 per resident (251st of 351)	$36.88 per resident (215th of 351)	$36.88 per resident (218th of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. $290,000 came in clauses that name Dudley; the other $150,000 went to organizations based in Dudley, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$100,000	"the Lupa Game Farm, Inc"	Enacted recipient based here
FY2020	$100,000	"the purchase of public safety communications equipment in the town of Dudley"	Enacted names the town
FY2026	$50,000	"repairs and upgrades to the police department, senior center and town hall in the town of Dudley"	Enacted names the town
FY2022	$50,000	"the Lupa Game Farm, Inc"	Enacted recipient based here
FY2024	$25,000	"waterline design and engineering services to mitigate per-and polyfluoroalkyl substances contamination on Eagle drive in the town of Dudley"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dudley received 1.55 times its proportional share of competitive grant awards.

Local road miles **82.5** 147th of 351 · 6.9 per 1,000 residents (160th of 351)	Town-owned bridges, replacement cost **$19.7M** scored exposure $5.4M · three in poor condition	Road-stream crossings **154** 34th of 351 · culverts and small crossings	Town-owned hazard dams **10** high or significant hazard
Land area **20.8 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **11,929** residents plus seasonal	Core infrastructure index **1.04** roads, culverts, dams, coast, flood, energy

Burden index 1.55; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$9,812** FY2017–2025 · 326th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.8% of Dudley's general-fund spending in FY2025, down from 15.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.4%** $1.7M of $10.8M · median town 14.1%	FY2016 **12.2%** $1.8M of $15M · median town 12.2%	FY2025 **9.8%** $2.4M of $24.3M · median town 11.5%	Net of state charges, FY2025 **9.6%** FY2010: 14.3% · median town 10.0%

Dudley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $15.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dudley's state aid did not keep pace with either price measure: FY2025 aid was 7.4% below its FY2006 aid grown by Boston-area consumer prices and 17.7% below grown by the government price index.

Gross state aid went from $1.7 million in FY2006 to $2.4 million in FY2025, +43.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+20.2%** $743,000 to $893,000 · all towns +54.0%	All fixed costs, FY2016–25 **+67.7%** $1.5M to $2.6M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dudley's health insurance would have been $927,000 in FY2025; it was $893,000, $35,000 below the path. Its fixed costs would have been $1.93 million in FY2025; it was $2.59 million, $660,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dudley came to $238,000, 158.4% of the $150,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$238,000	158.4%	28.2%
Placed in the town	$388,000	2.6 times	42.3%
Everything placed	$388,000	2.6 times	45.2%

SCHOOLS

Dudley's required school contribution is 2.5% of median household income, 217th highest of 351.

Chapter 70 aid, FY2026 **$16.4M** attributed to the town	Required local contribution **$9.3M** FY2026
Share of household income **2.5%** 217th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Dudley has no school district of its own. Its pupils attend Dudley, Dudley Charlton and Southern Worcester; Dudley accounts for 100%, 47% and 10% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Dudley received $5.8 million in earmarks placed in the town and competitive grants over ten years, 64% of the $9.1 million its size, need and institutions predict.

PEERS

Dudley ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dudley this town	**60**	**$17,447**	**$442**	**$36.88**	**1.55**	**2.5%**
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Clinton peer	53	$14,443	$344	$28.88	1.51	2.4%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Dunstable

Town · Middlesex County · 3,408 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale

STATE SENATE

First Middlesex · Vanna Howard (since March 2026) and Edward J. Kennedy (until October 2025)

SCHOOL DISTRICTS

Groton-Dunstable Regional School District, shared with Groton
Greater Lowell Regional Vocational Technical School District, vocational, shared with Dracut, Lowell and Tyngsborough

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Dunstable scores 51 on the Fairness Index for all state aid and 54 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

119th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	67	41	45

Rank under other weightings: 82nd to 146th.

Weighting-dependent: the range crosses the 45–55 band

Dunstable received less than its share of state aid on three of four measures; its blended score of 51 stays between 46 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

54 / 100

164th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	70	48	48

Rank under other weightings: 151st to 182nd.

Weighting-dependent: the range crosses the 45–55 band

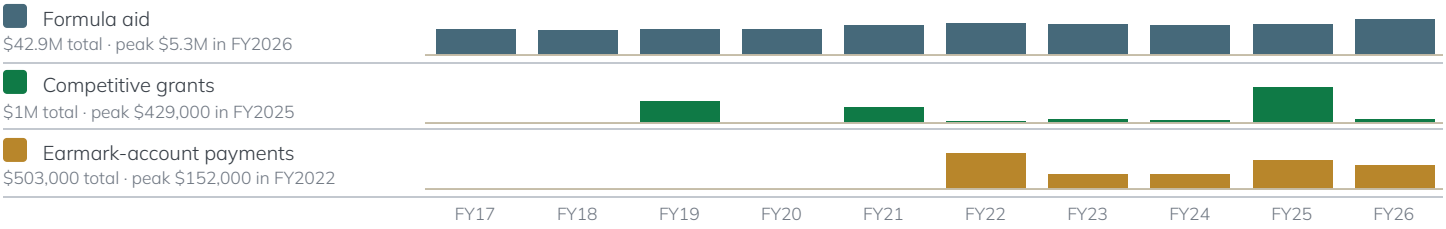
Dunstable received more than its share of discretionary money on two of four measures; its blended score of 54 stays between 50 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Dunstable's town government and school districts received $42.9 million in formula aid and $1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$42.9M	**$1M**	**$503,000**
$12,584 per resident (121st of 351) · gross	$305 per resident (206th of 351)	$148 per resident (11th of 351)

Competitive grants to Dunstable peaked in FY2025 at $429,000, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.7 million, are not shown.

EARMARKS

Dunstable received $495,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$495,000	**$495,000**	**$495,000**	**Not a member**
$145 per resident (20th of 351)	$145 per resident (32nd of 351)	$145 per resident (39th of 351)	35 municipalities had none

Placed in the town: five clauses in three of ten budgets; the most recent in FY2026. Every one names Dunstable directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$250,000	"repairs to the Joint Grass Brook culvert in the town of Dunstable"	Enacted names the town
FY2026	$75,000	"municipal improvements in the town of Dunstable"	Enacted names the town
FY2025	$75,000	"the town of Dunstable for library improvements and personal protection equipment"	Enacted names the town
FY2024	$50,000	"a new emergency vehicle for the fire chief in the town of Dunstable"	Enacted names the town
FY2025	$45,000	"updates to the Dunstable police department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Dunstable received 55% of its proportional share of competitive grant awards.

Local road miles **41.4** 287th of 351 · 12.2 per 1,000 residents (87th of 351)	Town-owned bridges, replacement cost **$1.1M** scored exposure $98,000 · none in poor condition	Road-stream crossings **42** 288th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **16.5 sq mi** 8% state-owned	Seasonal homes **2%** share of housing units	Peak service population **3,481** residents plus seasonal	Core infrastructure index **0.22** roads, culverts, dams, coast, flood, energy

Burden index 0.55; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **682 acres** 6.5% of land area · FY2026	State-owned land PILOT, FY2026 **$80,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$118** statewide $117 · FY2026	New growth per resident **$25,540** FY2017–2025 · 134th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.1% of Dunstable's general-fund spending in FY2025, down from 3.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.8%** $257,000 of $6.8M · median town 14.1%	FY2016 **2.9%** $256,000 of $9M · median town 12.2%	FY2025 **3.1%** $393,000 of $12.8M · median town 11.5%	Net of state charges, FY2025 **3.0%** FY2010: 3.0% · median town 10.0%

Dunstable's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Dunstable's state aid did not keep pace with either price measure: FY2025 aid was 1.5% below its FY2006 aid grown by Boston-area consumer prices and 12.4% below grown by the government price index.

Gross state aid went from $257,000 in FY2006 to $393,000 in FY2025, +52.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+31.9%** $198,000 to $262,000 · all towns +54.0%	All fixed costs, FY2016–25 **+53.4%** $532,000 to $817,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Dunstable's health insurance would have been $248,000 in FY2025; it was $262,000, $14,000 above the path. Its fixed costs would have been $665,000 in FY2025; it was $817,000, $152,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Dunstable came to $420,000, 6.6 times the $63,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$420,000	6.6 times	28.2%
Placed in the town	$420,000	6.6 times	42.3%
Everything placed	$420,000	6.6 times	45.2%

SCHOOLS

Dunstable's required school contribution is 2.4% of median household income, 243rd highest of 351.

Chapter 70 aid, FY2026 **$3.1M** attributed to the town	Required local contribution **$5.7M** FY2026
Share of household income **2.4%** 243rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Dunstable has no school district of its own. Its pupils attend Groton-Dunstable and Greater Lowell; Dunstable accounts for 24% and 0% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Dunstable received $1.5 million in earmarks placed in the town and competitive grants over ten years, about the $1.6 million its size, need and institutions predict.

PEERS

Dunstable ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Dunstable this town	**51**	**$12,584**	**$305**	**$145**	**0.55**	**2.4%**
West Newbury peer	48	$10,655	$574	$38.12	0.91	2.1%
Wenham peer	29	$6,869	$147	$69.20	0.80	2.5%
Oak Bluffs peer	51	$8,440	$2,606	$93.40	3.64	3.0%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Chilmark lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Duxbury

Town · Plymouth County · 16,185 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
6th Plymouth · Kenneth P. Sweezey

STATE SENATE
First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS
Duxbury Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council and Old Colony Planning Council

FAIRNESS INDEX

Duxbury scores 34 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

276th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	50	26	26

Rank under other weightings: 251st to 297th.

Stable low: below 45 under every weighting

Duxbury received less than its share of state aid on three of four measures; its blended score of 34 stays between 29 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

283rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	41	17	20

Rank under other weightings: 273rd to 301st.

Stable low: below 45 under every weighting

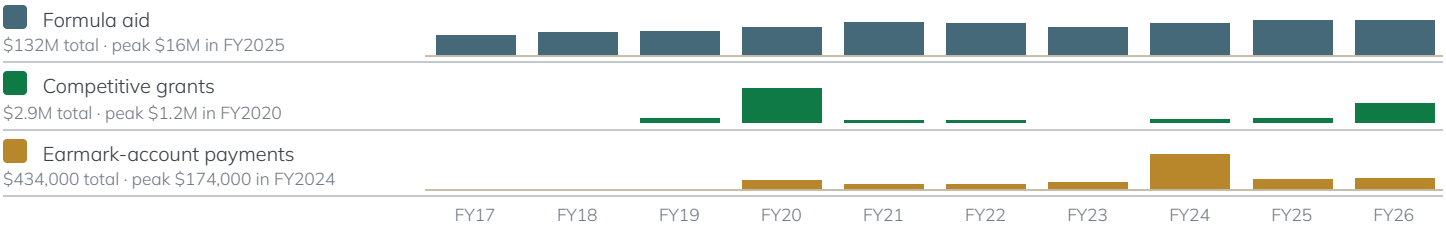
Duxbury received less than its share of discretionary money on all four measures; its blended score of 26 stays between 21 and 30 under every weighting tested.

STATE MONEY, FY2017–FY2026

Duxbury's town government and school districts received $132 million in formula aid and $2.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$132M	**$2.9M**	**$434,000**
$8,178 per resident (244th of 351) · gross	$182 per resident (264th of 351)	$26.79 per resident (162nd of 351)

Competitive grants to Duxbury peaked in FY2020 at $1.2 million, 42% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.4 million, are not shown.

EARMARKS

Duxbury received $518,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$518,000	**$518,000**	**$518,000**	**Not a member**
$32.03 per resident (219th of 351)	$32.03 per resident (231st of 351)	$32.03 per resident (232nd of 351)	35 municipalities had none

Placed in the town: 15 clauses in seven of ten budgets; the most recent in FY2025. Every one names Duxbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the town of Duxbury for infrastructure improvements"	Enacted names the town
FY2024	$60,000	"the support of grant funding and personnel efforts in Duxbury"	Enacted names the town
FY2024	$50,000	"fire safety and equipment improvements at the Duxbury fire department"	Enacted names the town
FY2018	$50,000	"the town of Duxbury for improvements at the Duxbury Senior Center"	Enacted names the town
FY2025	$45,000	"the Duxbury fire department to purchase equipment and resources"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Duxbury received 1.56 times its proportional share of competitive grant awards.

Local road miles **103.5** 82nd of 351 · 6.4 per 1,000 residents (180th of 351)	Town-owned bridges, replacement cost **$61M** scored exposure $53.9M · one in poor condition	Road-stream crossings **121** 75th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **23.7 sq mi** 0% state-owned	Seasonal homes **3%** share of housing units	Peak service population **16,628** residents plus seasonal	Core infrastructure index **2.31** roads, culverts, dams, coast, flood, energy

Burden index 1.56; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **29 acres** 0.2% of land area · FY2026	State-owned land PILOT, FY2026 **$191,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$6,669** statewide $117 · FY2026	New growth per resident **$27,263** FY2017–2025 · 123rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.9% of Duxbury's general-fund spending in FY2025, up from 7.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.9%** $4.1M of $51.7M · median town 14.1%	FY2016 **8.1%** $5.9M of $73.3M · median town 12.2%	FY2025 **8.9%** $8.5M of $95.8M · median town 11.5%	Net of state charges, FY2025 **8.2%** FY2010: 9.1% · median town 10.0%

Duxbury's state aid kept pace with both price measures: FY2025 aid was 34.3% above its FY2006 aid grown by Boston-area consumer prices and 19.4% above grown by the government price index.

Gross state aid went from $4.1 million in FY2006 to $8.5 million in FY2025, +108.3% in dollars. Flag: in FY2010, $138,000 of Duxbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+36.4%** $11.6M to $15.9M · all towns +54.0%	All fixed costs, FY2016–25 **+47.0%** $12.9M to $19M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Duxbury's health insurance would have been $14.5 million in FY2025; it was $15.9 million, $1.34 million above the path. Its fixed costs would have been $16.1 million in FY2025; it was $19 million, $2.85 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Duxbury came to $518,000, 12.2% of the $4.24 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$518,000	12.2%	28.2%
Placed in the town	$518,000	12.2%	42.3%
Everything placed	$518,000	12.2%	45.2%

SCHOOLS

Duxbury's required school contribution is 2.7% of median household income, 164th highest of 351.

Chapter 70 aid, FY2026 **$7.4M** to the town's district	Required local contribution **$28.8M** FY2026
Share of household income **2.7%** 164th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Duxbury runs its own school district.

EXPECTED AND ACTUAL

Duxbury received $6.6 million in earmarks placed in the town and competitive grants over ten years, 93% of the $7.1 million its size, need and institutions predict.

PEERS

Duxbury ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Duxbury this town	**34**	**$8,178**	**$182**	**$32.03**	**1.56**	**2.7%**
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

East Bridgewater

Town · Plymouth County · 14,456 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Plymouth · Alyson M. Sullivan-Almeida 76% of residents

9th Plymouth · Bridget Plouffe 24% of residents

East Bridgewater is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

East Bridgewater Public Schools, the town's own district

Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, Easton, Foxborough, Mansfield, Norton, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

East Bridgewater scores 48 on the Fairness Index for all state aid and 49 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

136th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	54	44	49

Rank under other weightings: 129th to 145th.

Near fair: between 45 and 55 under every weighting

East Bridgewater received less than its share of state aid on three of four measures; its blended score of 48 stays between 47 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

49 / 100

191st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	53	49	48

Rank under other weightings: 182nd to 196th.

Near fair: between 45 and 55 under every weighting

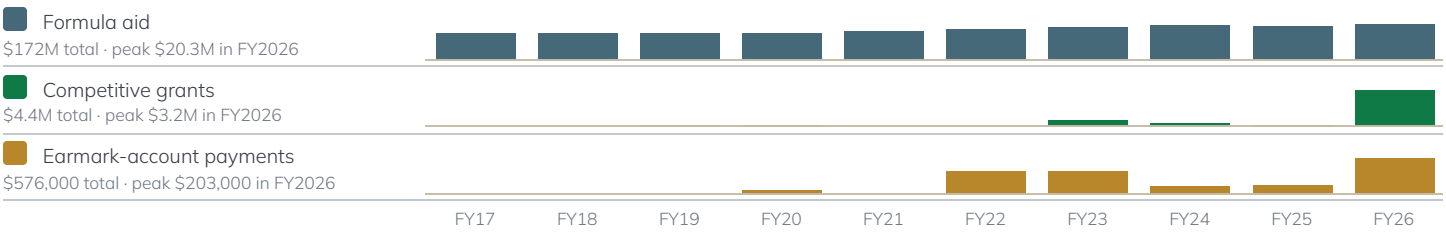
East Bridgewater received less than its share of discretionary money on three of four measures; its blended score of 49 stays between 48 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

East Bridgewater's town government and school districts received $172 million in formula aid and $4.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$172M	$4.4M	$576,000
$11,873 per resident (131st of 351) · gross	$303 per resident (207th of 351)	$39.87 per resident (110th of 351)

Competitive grants to East Bridgewater peaked in FY2026 at $3.2 million, 74% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.4 million, are not shown.

EARMARKS

East Bridgewater received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$1.2M	$1.2M	Not a member
$82.76 per resident (69th of 351)	$82.76 per resident (96th of 351)	$82.76 per resident (102nd of 351)	35 municipalities had none

Placed in the town: 24 clauses in nine of ten budgets; the most recent in FY2026. Every one names East Bridgewater directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$270,000	"in equal amounts for the following substance abuse coalitions and community partnerships: Avon Coalition for Every Student; Braintree Community..."	Enacted names the town
FY2020	$240,000	"in equal amounts for the following substance abuse coalitions and community partnerships: (i) Avon Coalition for Every Student; (ii) Canton Alliance..."	Enacted names the town
FY2021	$100,000	"in equal amounts to the following substance abuse coalitions and community partnerships to address increased demand for substance use prevention..."	Enacted names the town
FY2023	$75,000	"the two-hundredth anniversary of the town of East Bridgewater"	Enacted names the town
FY2022	$75,000	"engineering studies to determine a restoration plan for Forge pond in the town of East Bridgewater"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, East Bridgewater received 1.19 times its proportional share of competitive grant awards.

Local road miles **69.3** 190th of 351 · 4.8 per 1,000 residents (244th of 351)	Town-owned bridges, replacement cost **$10M** scored exposure $3.9M · two in poor condition	Road-stream crossings **73** 186th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.2 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **14,542** residents plus seasonal	Core infrastructure index **0.50** roads, culverts, dams, coast, flood, energy

Burden index 1.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **163 acres** 1.5% of land area · FY2026	State-owned land PILOT, FY2026 **$5,947** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$36.50** statewide $117 · FY2026	New growth per resident **$15,582** FY2017–2025 · 244th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 25.8% of East Bridgewater's general-fund spending in FY2025, down from 38.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **38.9%** $11.7M of $30.1M · median town 14.1%	FY2016 **30.2%** $12.9M of $42.8M · median town 12.2%	FY2025 **25.8%** $15.4M of $59.7M · median town 11.5%	Net of state charges, FY2025 **24.5%** FY2010: 34.8% · median town 10.0%

East Bridgewater's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $981,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

East Bridgewater's state aid did not keep pace with either price measure: FY2025 aid was 15.0% below its FY2006 aid grown by Boston-area consumer prices and 24.4% below grown by the government price index.

Gross state aid went from $11.7 million in FY2006 to $15.4 million in FY2025, +31.9% in dollars. Flag: in FY2010, $798,000 of East Bridgewater's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+25.0%** $4M to $5M · all towns +54.0%	All fixed costs, FY2016–25 **+51.9%** $6.7M to $10.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, East Bridgewater's health insurance would have been $5.02 million in FY2025; it was $5.02 million, $3,640 above the path. Its fixed costs would have been $8.34 million in FY2025; it was $10.1 million, $1.80 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming East Bridgewater came to $1.2 million, 115.1% of the $1.00 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.2M	115.1%	28.2%
Placed in the town	$1.2M	115.1%	42.3%
Everything placed	$1.2M	115.1%	45.2%

SCHOOLS

East Bridgewater's required school contribution is 2.4% of median household income, 254th highest of 351.

Chapter 70 aid, FY2026 **$14.4M** to the town's district	Required local contribution **$16.8M** FY2026
Share of household income **2.4%** 254th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

East Bridgewater runs its own school district and also belongs to Southeastern; East Bridgewater accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

East Bridgewater received $5.9 million in earmarks placed in the town and competitive grants over ten years, about the $6.1 million its size, need and institutions predict.

PEERS

East Bridgewater ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
East Bridgewater this town	**48**	**$11,873**	**$303**	**$82.76**	**1.19**	**2.4%**
Norton peer	44	$10,594	$69.10	$29.56	0.74	3.1%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Lunenburg peer	40	$10,667	$157	$54.36	0.42	2.7%
Sturbridge peer	51	$13,598	$158	$56.22	0.74	2.5%
Southwick peer	56	$14,645	$652	$57.30	0.77	2.4%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

East Brookfield

Town · Worcester County · 2,166 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
5th Worcester · Donald R. Berthiaume, Jr.	**Worcester and Hampshire** · Peter J. Durant	**Spencer-E Brookfield Regional School District**, shared with Spencer	Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

East Brookfield scores 55 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

86th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	52	56	55

Rank under other weightings: 72nd to 94th.

Weighting-dependent: the range crosses the 45–55 band

East Brookfield received more than its share of state aid on all four measures; its blended score of 55 stays between 54 and 56 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

291st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	23	25	24

Rank under other weightings: 280th to 301st.

Stable low: below 45 under every weighting

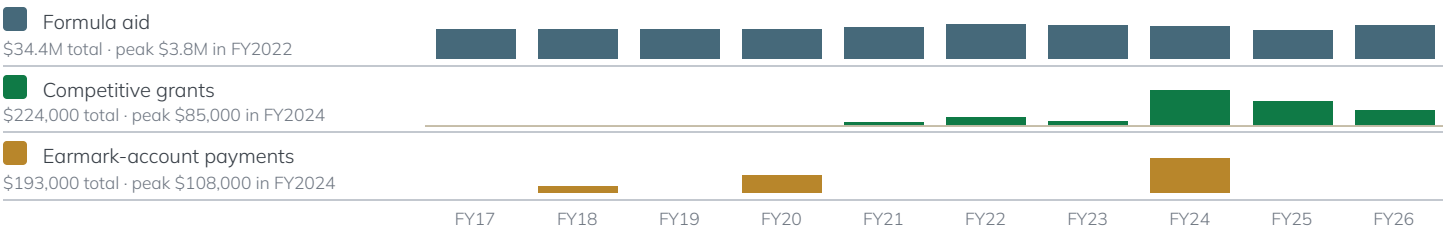
East Brookfield received less than its share of discretionary money on all four measures; its blended score of 25 stays between 24 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

East Brookfield's town government and school districts received $34.4 million in formula aid and $224,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$34.4M	**$224,000**	**$193,000**
$15,885 per resident (63rd of 351) · gross	$104 per resident (322nd of 351)	$89.11 per resident (30th of 351)

Competitive grants to East Brookfield peaked in FY2024 at $85,000, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.3 million, are not shown.

EARMARKS

East Brookfield received $205,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$205,000	**$205,000**	**$205,000**	**Not a member**
$94.64 per resident (57th of 351)	$94.64 per resident (77th of 351)	$94.64 per resident (87th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2024. Every one names East Brookfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"upgrades to municipal buildings in the town of East Brookfield"	Enacted names the town
FY2020	$60,000	"the commemoration of the 100th anniversary for the town of East Brookfield"	Enacted names the town
FY2018	$25,000	"economic development projects in the town of East Brookfield"	Enacted names the town
FY2024	$20,000	"town hall services in the town of East Brookfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, East Brookfield received 6% of its proportional share of competitive grant awards.

Local road miles **19.2** 339th of 351 · 8.9 per 1,000 residents (121st of 351)	Town-owned bridges, replacement cost **$8.8M** scored exposure $1.2M · none in poor condition	Road-stream crossings **41** 293rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **9.9 sq mi** 10% state-owned	Seasonal homes **7%** share of housing units	Peak service population **2,322** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.06; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **617 acres** 9.8% of land area · FY2026	State-owned land PILOT, FY2026 **$6,074** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$9.84** statewide $117 · FY2026	New growth per resident **$23,872** FY2017–2025 · 145th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.0% of East Brookfield's general-fund spending in FY2025, down from 11.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $367,000 of $3.3M · median town 14.1%	FY2016 **9.7%** $478,000 of $4.9M · median town 12.2%	FY2025 **9.0%** $579,000 of $6.4M · median town 11.5%	Net of state charges, FY2025 **8.1%** FY2010: 9.5% · median town 10.0%

East Brookfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

East Brookfield's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 1.8% above its FY2006 aid grown by Boston-area consumer prices and 9.5% below grown by the government price index.

Gross state aid went from $367,000 in FY2006 to $579,000 in FY2025, +57.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+78.8%** $194,000 to $347,000 · all towns +54.0%	All fixed costs, FY2016–25 **+122.1%** $355,000 to $789,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, East Brookfield's health insurance would have been $243,000 in FY2025; it was $347,000, $105,000 above the path. Its fixed costs would have been $444,000 in FY2025; it was $789,000, $345,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+37%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming East Brookfield came to $205,000, 133.9% of the $153,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$205,000	133.9%	28.2%
Placed in the town	$205,000	133.9%	42.3%
Everything placed	$205,000	133.9%	45.2%

SCHOOLS

East Brookfield's required school contribution is 3.2% of median household income, 39th highest of 351.

Chapter 70 aid, FY2026 **$2.4M** attributed to the town	Required local contribution **$2.4M** FY2026
Share of household income **3.2%** 39th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

East Brookfield has no school district of its own. Its pupils attend East Brookfield and Spencer East Brookfield; East Brookfield accounts for 100% and 17% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

East Brookfield received $429,000 in earmarks placed in the town and competitive grants over ten years, 10% of the $4.1 million its size, need and institutions predict.

PEERS

East Brookfield ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
East Brookfield this town	**55**	**$15,885**	**$104**	**$94.64**	**0.06**	**3.2%**
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
Lanesborough peer	40	$10,886	$484	$0	1.16	2.8%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Gill peer	40	$9,063	$224	$50.29	0.47	2.3%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

East Longmeadow

Town · Hampden County · 16,425 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Hampden · Brian M. Ashe 75% of residents
12th Hampden · Angelo J. Puppolo, Jr. 25% of residents

East Longmeadow is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS

East Longmeadow Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

East Longmeadow scores 42 on the Fairness Index for all state aid and 28 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

188th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	48	41	35

Rank under other weightings: 171st to 206th.

Weighting-dependent: the range crosses the 45–55 band

East Longmeadow received less than its share of state aid on all four measures; its blended score of 43 stays between 40 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

28 / 100

271st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	31	32	21

Rank under other weightings: 266th to 281st.

Stable low: below 45 under every weighting

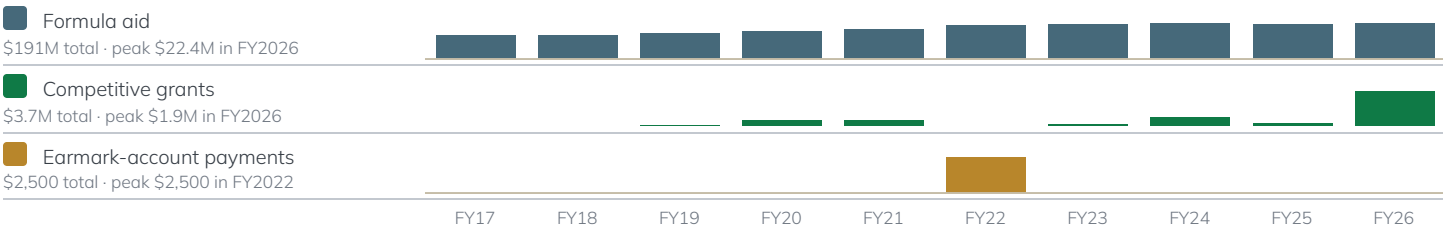
East Longmeadow received less than its share of discretionary money on all four measures; its blended score of 28 stays between 26 and 30 under every weighting tested.

STATE MONEY, FY2017–FY2026

East Longmeadow's town government and school districts received $191 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$191M	**$3.7M**	**$2,500**
$11,619 per resident (137th of 351) · gross	$224 per resident (241st of 351)	$0.15 per resident (338th of 351)

Competitive grants to East Longmeadow peaked in FY2026 at $1.9 million, 51% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.1 million, are not shown.

EARMARKS

East Longmeadow received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	**$225,000**	**$225,000**	**Not a member**
$13.70 per resident (288th of 351)	$13.70 per resident (296th of 351)	$13.70 per resident (297th of 351)	35 municipalities had none

Placed in the town: three clauses in two of ten budgets; the most recent in FY2025. Every one names East Longmeadow directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$125,000	"the East Longmeadow Veterans Memorial Committee for the construction of a veterans memorial in the town of East Longmeadow"	Enacted names the town
FY2024	$75,000	"the East Longmeadow Pleasant View senior center for a new ADA-compliant van to transport seniors to medical appointments, adult day care facilities…"	Enacted names the town
FY2024	$25,000	"the East Longmeadow American Legion Post 293 for repairs, maintenance and upgrades to their current facility"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, East Longmeadow received 72% of its proportional share of competitive grant awards.

Local road miles **98.7** 99th of 351 · 6.0 per 1,000 residents (190th of 351)	Town-owned bridges, replacement cost **$1.4M** scored exposure $356,000 · none in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **16,425** residents plus seasonal	Core infrastructure index **0.60** roads, culverts, dams, coast, flood, energy

Burden index 0.72; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$14,387** FY2017–2025 · 261st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 25.1% of East Longmeadow's general-fund spending in FY2025, up from 17.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.6%** $6.5M of $36.6M · median town 14.1%	FY2016 **23.8%** $12.2M of $51.3M · median town 12.2%	FY2025 **25.1%** $17.7M of $70.3M · median town 11.5%	Net of state charges, FY2025 **24.0%** FY2010: 22.9% · median town 10.0%

East Longmeadow's state aid kept pace with both price measures: FY2025 aid was 76.4% above its FY2006 aid grown by Boston-area consumer prices and 56.8% above grown by the government price index.

Gross state aid went from $6.5 million in FY2006 to $17.7 million in FY2025, +173.6% in dollars. Flag: in FY2010, $1.2 million of East Longmeadow's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.6%** $4.8M to $7.1M · all towns +54.0%	All fixed costs, FY2016–25 **+65.5%** $8.4M to $13.8M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, East Longmeadow's health insurance would have been $5.95 million in FY2025; it was $7.08 million, $1.13 million above the path. Its fixed costs would have been $10.5 million in FY2025; it was $13.8 million, $3.40 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming East Longmeadow came to $225,000, 9.7% of the $2.32 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$225,000	9.7%	28.2%
Placed in the town	$225,000	9.7%	42.3%
Everything placed	$225,000	9.7%	45.2%

SCHOOLS

East Longmeadow's required school contribution is 3.2% of median household income, 34th highest of 351.

Chapter 70 aid, FY2026 **$15.7M** to the town's district	Required local contribution **$20.6M** FY2026
Share of household income **3.2%** 34th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

East Longmeadow runs its own school district.

EXPECTED AND ACTUAL

East Longmeadow received $4 million in earmarks placed in the town and competitive grants over ten years, 74% of the $5.4 million its size, need and institutions predict.

PEERS

East Longmeadow ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
East Longmeadow this town	**42**	**$11,619**	**$224**	**$13.70**	**0.72**	**3.2%**
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Bridgewater peer	39	$9,702	$309	$21.78	1.08	3.0%
Pepperell peer	51	$13,867	$271	$56.38	1.79	2.6%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Whitman lowest in class of 30	56	$16,230	$202	$15.36	0.52	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Eastham

Town · Barnstable County · 5,811 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Barnstable · Hadley Luddy

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Eastham Public Schools, the town's own district
Nauset Regional School District, shared with Brewster, Orleans and Wellfleet
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Harwich, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Eastham scores 21 on the Fairness Index for all state aid and 23 for discretionary money. Fifty is a fair share.

ALL STATE AID

21 / 100

351st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
20	20	28	15

Rank under other weightings: 348th to 351st.

Stable low: below 45 under every weighting

Eastham received less than its share of state aid on all four measures; its blended score of 21 stays between 19 and 23 under every weighting tested.

DISCRETIONARY MONEY ONLY

23 / 100

301st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	28	15	22

Rank under other weightings: 286th to 309th.

Stable low: below 45 under every weighting

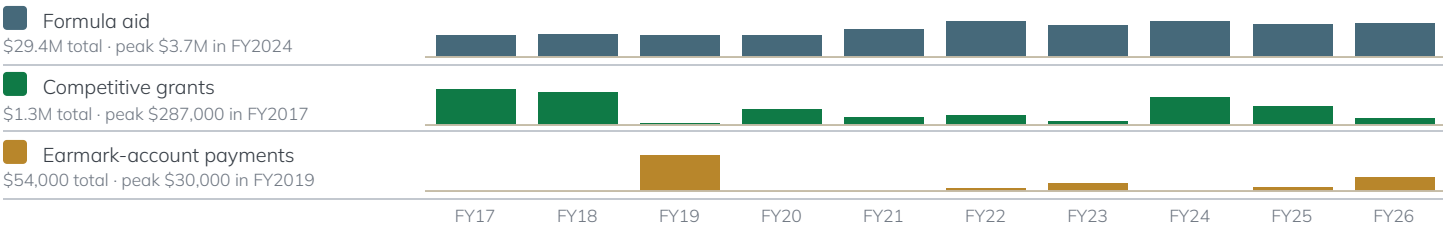
Eastham received less than its share of discretionary money on all four measures; its blended score of 23 stays between 20 and 26 under every weighting tested.

STATE MONEY, FY2017–FY2026

Eastham's town government and school districts received $29.4 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$29.4M	**$1.3M**	**$54,000**
$5,051 per resident (345th of 351) · gross	$226 per resident (239th of 351)	$9.32 per resident (264th of 351)

Competitive grants to Eastham peaked in FY2017 at $287,000, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.8 million, are not shown.

EARMARKS

Eastham received $37,000 in local earmarks naming the town, $537,000 placed in the town and $537,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$37,000	**$537,000**	**$537,000**	**Not a member**
$6.37 per resident (304th of 351)	$92.41 per resident (83rd of 351)	$92.41 per resident (92nd of 351)	35 municipalities had none

Placed in the town: eight clauses in seven of ten budgets; the most recent in FY2025. $37,000 came in clauses that name Eastham; the other $500,000 went to organizations based in Eastham, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$100,000	"Lower Cape Cod Community Development Corporation d/b/a the Community Development Partnership"	Enacted recipient based here
FY2024	$100,000	"Lower Cape Cod Community Development Corporation"	Enacted recipient based here
FY2023	$100,000	"Lower Cape Cod Community Development Corporation d/b/a the Community Development Partnership"	Enacted recipient based here
FY2020	$100,000	"the Community Development Partnership of Cape Cod"	Enacted recipient based here
FY2019	$100,000	"the Community Development Partnership of Cape Cod"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Eastham received 48% of its proportional share of competitive grant awards.

Local road miles **50.7** 249th of 351 · 8.7 per 1,000 residents (123rd of 351)	Town-owned bridges, replacement cost **$2.4M** scored exposure $228,000 · none in poor condition	Road-stream crossings **19** 329th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.0 sq mi** 1% state-owned	Seasonal homes **53%** share of housing units	Peak service population **12,481** residents plus seasonal	Core infrastructure index **0.34** roads, culverts, dams, coast, flood, energy

Burden index 0.48; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **8 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$3,631** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$477** statewide $117 · FY2026	New growth per resident **$38,595** FY2017–2025 · 61st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.7% of Eastham's general-fund spending in FY2025, down from 2.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.7%** $468,000 of $17.1M · median town 14.1%	FY2016 **2.1%** $531,000 of $25.7M · median town 12.2%	FY2025 **1.7%** $771,000 of $44.8M · median town 11.5%	Net of state charges, FY2025 **-0.5%** FY2010: 0.6% · median town 10.0%

Eastham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $908,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Eastham's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 6.3% above its FY2006 aid grown by Boston-area consumer prices and 5.5% below grown by the government price index.

Gross state aid went from $468,000 in FY2006 to $771,000 in FY2025, +64.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.3%** $2.1M to $3M · all towns +54.0%	All fixed costs, FY2016–25 **+45.0%** $4.2M to $6M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Eastham's health insurance would have been $2.58 million in FY2025; it was $3.00 million, $422,000 above the path. Its fixed costs would have been $5.18 million in FY2025; it was $6.02 million, $835,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Eastham came to $37,000, 4.0% of the $936,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$37,000	4.0%	28.2%
Placed in the town	$537,000	57.4%	42.3%
Everything placed	$537,000	57.4%	45.2%

SCHOOLS

Eastham's required school contribution is 2.6% of median household income, 195th highest of 351.

Chapter 70 aid, FY2026 **$1.5M** to the town's district	Required local contribution **$5.7M** FY2026
Share of household income **2.6%** 195th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Eastham runs its own district for some grades and belongs to Nauset and Cape Cod for others; Eastham accounts for 20% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Eastham received $2.4 million in earmarks placed in the town and competitive grants over ten years, 26% of the $9.1 million its size, need and institutions predict.

PEERS

Eastham ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Eastham this town	**21**	**$5,051**	**$226**	**$92.41**	**0.48**	**2.6%**
Tisbury peer · lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%
Orleans peer	26	$4,954	$820	$115	1.26	1.7%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Easthampton

City · Hampshire County · 16,086 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
2nd Hampshire · Homar Gómez	**Hampden and Hampshire** · John C. Velis	**Easthampton Public Schools**, the city's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

Easthampton scores 41 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

202nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	34	50	40

Rank under other weightings: 165th to 244th.

Stable low: below 45 under every weighting

Easthampton received less than its share of state aid on all four measures; its blended score of 41 stays between 39 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

69th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
82	77	84	81

Rank under other weightings: 64th to 77th.

Stable high: above 55 under every weighting

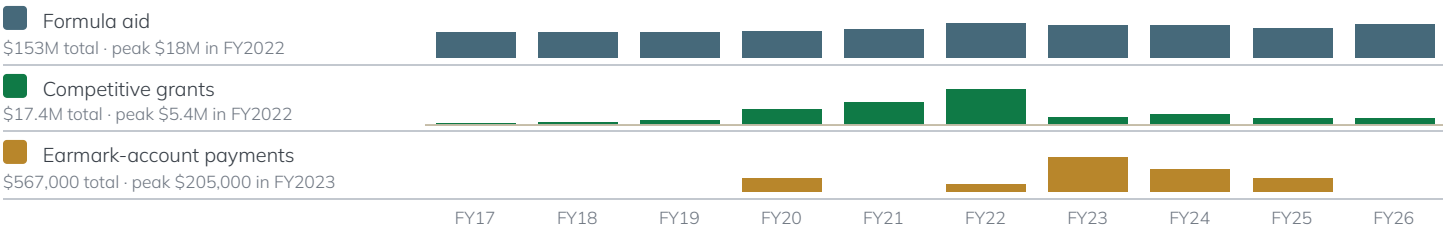
Easthampton received more than its share of discretionary money on all four measures; its blended score of 81 stays between 80 and 82 under every weighting tested.

STATE MONEY, FY2017–FY2026

Easthampton's town government and school districts received $153 million in formula aid and $17.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$153M	**$17.4M**	**$567,000**
$9,515 per resident (193rd of 351) · gross	$1,083 per resident (72nd of 351)	$35.23 per resident (128th of 351)

Competitive grants to Easthampton peaked in FY2022 at $5.4 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $14.3 million, are not shown.

EARMARKS

Easthampton received $834,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$834,000	**$834,000**	**$834,000**	**Not a member**
$51.82 per resident (143rd of 351)	$51.82 per resident (165th of 351)	$51.82 per resident (170th of 351)	35 municipalities had none

Placed in the town: 15 clauses in nine of ten budgets; the most recent in FY2026. Every one names Easthampton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$100,000	"downtown pedestrian safety improvements to the city of Easthampton"	Enacted names the town
FY2024	$100,000	"New City community park designs in the city of Easthampton"	Enacted names the town
FY2019	$100,000	"The Treehouse Foundation, Inc. of the city of Easthampton to expand the intergenerational Treehouse Community model to the MetroWest region"	Enacted names the town
FY2018	$100,000	"The Treehouse Foundation, Inc. of the city of Easthampton for planning to replicate the Intergenerational Treehouse Community model in the MetroWest..."	Enacted names the town
FY2017	$100,000	"Treehouse Foundation of Easthampton for planning to replicate the Intergenerational Treehouse Community model in the metrowest region"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Easthampton received 3.73 times its proportional share of competitive grant awards.

Local road miles **82.9** 146th of 351 · 5.2 per 1,000 residents (223rd of 351)	Town-owned bridges, replacement cost **$26.9M** scored exposure $14M · three in poor condition	Road-stream crossings **62** 223rd of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **13.3 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **16,150** residents plus seasonal	Core infrastructure index **2.76** roads, culverts, dams, coast, flood, energy

Burden index 3.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **15 acres** 0.2% of land area · FY2026	State-owned land PILOT, FY2026 **$5,894** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$391** statewide $117 · FY2026	New growth per resident **$9,894** FY2017–2025 · 325th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.6% of Easthampton's general-fund spending in FY2025, down from 36.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.7%** $10.8M of $29.3M · median town 14.1%	FY2016 **30.1%** $11.3M of $37.7M · median town 12.2%	FY2025 **23.6%** $13.5M of $57.3M · median town 11.5%	Net of state charges, FY2025 **18.3%** FY2010: 29.6% · median town 10.0%

Easthampton's state aid did not keep pace with either price measure: FY2025 aid was 19.0% below its FY2006 aid grown by Boston-area consumer prices and 28.0% below grown by the government price index.

Gross state aid went from $10.8 million in FY2006 to $13.5 million in FY2025, +25.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+55.4%** $3.8M to $5.9M · all towns +54.0%	All fixed costs, FY2016–25 **+57.6%** $7.1M to $11.2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Easthampton's health insurance would have been $4.74 million in FY2025; it was $5.90 million, $1.16 million above the path. Its fixed costs would have been $8.86 million in FY2025; it was $11.2 million, $2.32 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Easthampton came to $819,000, 38.9% of the $2.10 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$819,000	38.9%	28.2%
Placed in the town	$819,000	38.9%	42.3%
Everything placed	$819,000	38.9%	45.2%

SCHOOLS

Easthampton's required school contribution is 2.9% of median household income, 107th highest of 351.

Chapter 70 aid, FY2026 **$9.1M** to the town's district	Required local contribution **$15.8M** FY2026
Share of household income **2.9%** 107th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Easthampton runs its own school district.

EXPECTED AND ACTUAL

Easthampton received $19.3 million in earmarks placed in the town and competitive grants over ten years, 77% more than the $10.9 million its size, need and institutions predict.

PEERS

Easthampton ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Easthampton this town	**41**	**$9,515**	**$1,083**	**$51.82**	**3.73**	**2.9%**
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Fairhaven peer	47	$10,747	$508	$12.58	0.36	2.8%
Ludlow peer	42	$10,596	$407	$132	1.85	2.8%
Carver peer · lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Easton

Town · Bristol County · 25,316 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Plymouth · Bridget Plouffe 65% of residents
3rd Bristol · Lisa Field and Carol A. Doherty (until February 2025) 35% of residents

Easton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr.

SCHOOL DISTRICTS

Easton Public Schools, the town's own district
Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Foxborough, Mansfield, Norton, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Easton scores 30 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

308th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	34	28	28

Rank under other weightings: 298th to 317th.

Stable low: below 45 under every weighting

Easton received less than its share of state aid on all four measures; its blended score of 30 stays between 29 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

234th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	41	37	34

Rank under other weightings: 233rd to 240th.

Stable low: below 45 under every weighting

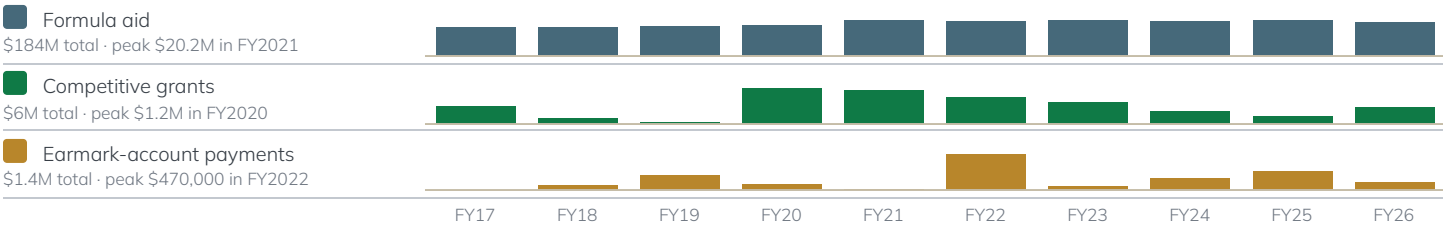
Easton received less than its share of discretionary money on all four measures; its blended score of 37 stays between 36 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Easton's town government and school districts received $184 million in formula aid and $6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$184M	**$6M**	**$1.4M**
$7,249 per resident (281st of 351) · gross	$236 per resident (231st of 351)	$54.82 per resident (67th of 351)

Competitive grants to Easton were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.7 million, are not shown.

EARMARKS

Easton received $1.4 million in local earmarks naming the town, $1.4 million placed in the town and $1.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.4M	**$1.4M**	**$1.4M**	**Not a member**
$56.92 per resident (125th of 351)	$53.96 per resident (157th of 351)	$56.92 per resident (155th of 351)	35 municipalities had none

Placed in the town: 23 clauses in ten of ten budgets; the most recent in FY2026. Every one names Easton directly.

Names the town includes $75,000 in clauses that name Easton but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $75,000 in one clause for state facilities located in Easton (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$350,000	"the improvement of public safety, public works, and council on aging parking lots and the improvement of sidewalks on Black Brook road in the town of..."	Enacted names the town
FY2019	$125,000	"carbon vessels at the North Easton Village Wastewater Treatment Plant in Easton"	Enacted names the town
FY2025	$100,000	"equipment for the Easton fire department"	Enacted names the town
FY2024	$100,000	"equipment for the Easton fire department"	Enacted names the town
FY2025	$75,000	"the beautification and redevelopment of the Swift park in the town of Easton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Easton received 1.08 times its proportional share of competitive grant awards.

Local road miles **117.0** 65th of 351 · 4.6 per 1,000 residents (255th of 351)	Town-owned bridges, replacement cost **$9.9M** scored exposure $4.7M · two in poor condition	Road-stream crossings **135** 58th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **28.8 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **25,333** residents plus seasonal	Core infrastructure index **0.38** roads, culverts, dams, coast, flood, energy

Burden index 1.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,403 acres** 7.6% of land area · FY2026	State-owned land PILOT, FY2026 **$165,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$117** statewide $117 · FY2026	New growth per resident **$19,703** FY2017–2025 · 190th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.4% of Easton's general-fund spending in FY2025, down from 23.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.9%** $11.6M of $48.4M · median town 14.1%	FY2016 **18.2%** $13.1M of $72M · median town 12.2%	FY2025 **14.4%** $14.3M of $99.4M · median town 11.5%	Net of state charges, FY2025 **13.0%** FY2010: 20.5% · median town 10.0%

Easton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $459,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Easton's state aid did not keep pace with either price measure: FY2025 aid was 20.2% below its FY2006 aid grown by Boston-area consumer prices and 29.1% below grown by the government price index.

Gross state aid went from $11.6 million in FY2006 to $14.3 million in FY2025, +23.8% in dollars. Flag: in FY2010, $984,000 of Easton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+41.6%** $7.3M to $10.3M · all towns +54.0%	All fixed costs, FY2016–25 **+53.9%** $12M to $18.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Easton's health insurance would have been $9.09 million in FY2025; it was $10.3 million, $1.22 million above the path. Its fixed costs would have been $15 million in FY2025; it was $18.5 million, $3.49 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Easton came to $1.4 million, 45.6% of the $3.03 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$1.4M	45.6%	28.2%
Placed in the town	$1.3M	43.1%	42.3%
Everything placed	$1.4M	45.6%	45.2%

SCHOOLS

Easton's required school contribution is 3.3% of median household income, 30th highest of 351.

Chapter 70 aid, FY2026 **$12M** to the town's district	Required local contribution **$38.2M** FY2026
Share of household income **3.3%** 30th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Easton runs its own school district and also belongs to Southeastern and Bristol County; Easton accounts for 6% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Easton received $7.5 million in earmarks placed in the town and competitive grants over ten years, about the $7.3 million its size, need and institutions predict.

PEERS

Easton ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Easton this town	**30**	**$7,249**	**$236**	**$53.96**	**1.08**	**3.3%**
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Braintree peer	39	$9,109	$142	$117	0.55	3.4%
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Seekonk peer	31	$7,825	$53.68	$16.99	1.67	3.0%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Holden lowest in class of 30	49	$13,276	$103	$15.70	0.39	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Edgartown

Town · Dukes County · 5,278 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Edgartown Public Schools, the town's own district

Martha's Vineyard Regional School District, shared with Aquinnah, Chilmark, Oak Bluffs, Tisbury and West Tisbury

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

Edgartown scores 55 on the Fairness Index for all state aid and 92 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

80th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	63	46	65

Rank under other weightings: 46th to 112th.

Weighting-dependent: the range crosses the 45–55 band

Edgartown received less than its share of state aid on two of four measures; its blended score of 55 stays between 50 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

92 / 100

37th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	97	78	97

Rank under other weightings: 29th to 45th.

Stable high: above 55 under every weighting

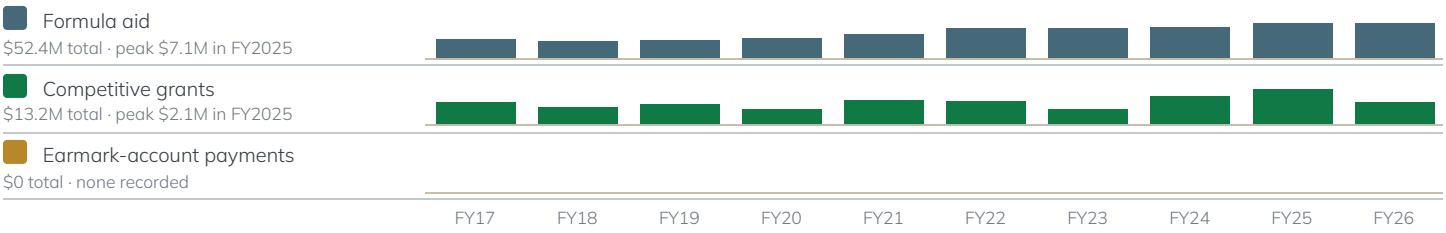
Edgartown received more than its share of discretionary money on all four measures; its blended score of 92 stays between 88 and 95 under every weighting tested.

STATE MONEY, FY2017–FY2026

Edgartown's town government and school districts received $52.4 million in formula aid and $13.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$52.4M	$13.2M	$0
$9,919 per resident (180th of 351) · gross	$2,500 per resident (38th of 351)	$0 per resident (339th of 351)

Competitive grants to Edgartown were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $33.9 million, are not shown.

EARMARKS

No local earmark was placed in Edgartown in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Edgartown's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Mattapoisett	$120,000	$120,000	$120,000	$18.09
Boxborough	$240,000	$240,000	$240,000	$43.67
Harvard	$125,000	$125,000	$125,000	$18.05
Topsfield	$446,000	$446,000	$446,000	$67.96
Newbury	$263,000	$263,000	$263,000	$38.77

WHAT THE TOWN CARRIES

Measured against what it maintains, Edgartown received 36% of its proportional share of competitive grant awards.

Local road miles **45.5** 268th of 351 · 8.6 per 1,000 residents (126th of 351)	Town-owned bridges, replacement cost **$1.8M** scored exposure $891,000 · one in poor condition	Road-stream crossings **9** 338th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **26.8 sq mi** 17% state-owned	Seasonal homes **63%** share of housing units	Peak service population **14,543** residents plus seasonal	Core infrastructure index **0.13** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,848 acres** 16.6% of land area · FY2026	State-owned land PILOT, FY2026 **$2.7M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$965** statewide $117 · FY2026	New growth per resident **$251,351** FY2017–2025 · 4th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

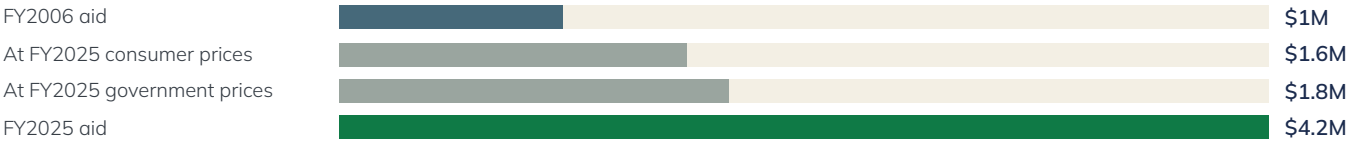
State aid covered 8.6% of Edgartown's general-fund spending in FY2025, up from 4.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.3%** $1M of $23.7M · median town 14.1%	FY2016 **6.4%** $2.1M of $32.6M · median town 12.2%	FY2025 **8.6%** $4.2M of $49.1M · median town 11.5%	Net of state charges, FY2025 **5.1%** FY2010: 1.9% · median town 10.0%

Edgartown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Edgartown's state aid kept pace with both price measures: FY2025 aid was 167.7% above its FY2006 aid grown by Boston-area consumer prices and 138.0% above grown by the government price index.



Gross state aid went from $1 million in FY2006 to $4.2 million in FY2025, +315.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.0%** $2.9M to $4.4M · all towns +54.0%	All fixed costs, FY2016–25 **+57.5%** $4.7M to $7.5M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Edgartown's health insurance would have been $3.67 million in FY2025; it was $4.35 million, $679,000 above the path. Its fixed costs would have been $5.93 million in FY2025; it was $7.48 million, $1.55 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Edgartown came to $0, 0.0% of the $1.41 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Edgartown's required school contribution is 3.9% of median household income, 5th highest of 351.

Chapter 70 aid, FY2026 **$2.3M** to the town's district	Required local contribution **$8.6M** FY2026
Share of household income **3.9%** 5th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+22%** after inflation

Edgartown runs its own district for some grades and belongs to Martha's Vineyard for others; Edgartown accounts for 28% of that district's foundation budget.

EXPECTED AND ACTUAL

Edgartown received $13.8 million in earmarks placed in the town and competitive grants over ten years, 20% more than the $11.5 million its size, need and institutions predict.

PEERS

Edgartown is the only municipality, among itself and its ten nearest peers, with no earmarks placed in it in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Edgartown this town	**55**	**$9,919**	**$2,500**	**$0**	**0.36**	**3.9%**
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Boxborough peer	34	$8,257	$231	$43.67	0.36	2.8%
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Newbury peer	41	$8,033	$339	$38.77	0.19	1.6%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Otis lowest in class of 30	43	$6,679	$2,109	$0	1.01	2.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Egremont

Town · Berkshire County · 1,230 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Southern Berkshire Regional School District, shared with Alford, Monterey, New Marlborough and Sheffield

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Egremont scores 51 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

111th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	53	53	51

Rank under other weightings: 99th to 123rd.

Near fair: between 45 and 55 under every weighting

Egremont received more than its share of state aid on three of four measures; its blended score of 51 stays between 51 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

15th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	94	96

Rank under other weightings: 14th to 20th.

Stable high: above 55 under every weighting

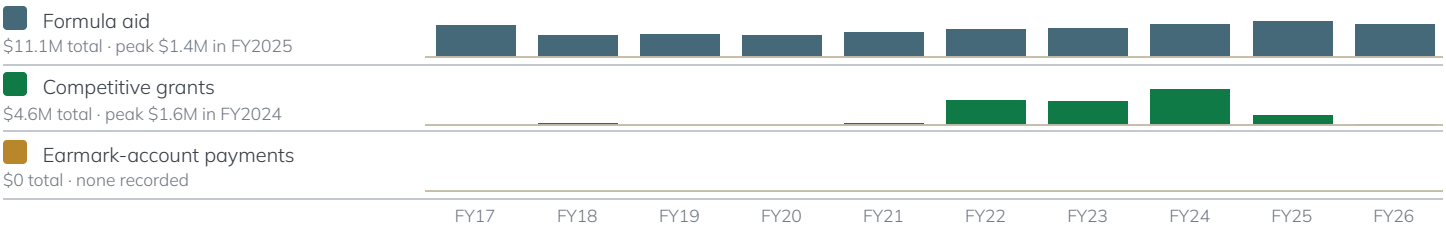
Egremont received more than its share of discretionary money on all four measures; its blended score of 96 stays between 95 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Egremont's town government and school districts received $11.1 million in formula aid and $4.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.1M	$4.6M	$0
$9,039 per resident (220th of 351) · gross	$3,748 per resident (26th of 351)	$0 per resident (339th of 351)

Competitive grants to Egremont peaked in FY2024 at $1.6 million, 36% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.9 million, are not shown.

EARMARKS

Egremont received $0 in local earmarks naming the town, $485,000 placed in the town and $485,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$485,000	$485,000	Not a member
enacted, ten budgets	$394 per resident (2nd of 351)	$394 per resident (6th of 351)	35 municipalities had none

Placed in the town: seven clauses in seven of ten budgets; the most recent in FY2026. $0 came in clauses that name Egremont; the other $485,000 went to organizations based in Egremont, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$100,000	"Greenagers, Inc. teen and young adult environmental programming"	Enacted recipient based here
FY2024	$75,000	"Greenagers, Inc. teen and young adult environmental programming"	Enacted recipient based here
FY2023	$75,000	"Greenagers, Inc. teen and young adult environmental programming"	Enacted recipient based here
FY2022	$75,000	"Greenagers, Inc. teen and young adult environmental programming"	Enacted recipient based here
FY2025	$60,000	"Greenagers, Inc. teen and young adult environmental programming"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Egremont received 2.06 times its proportional share of competitive grant awards.

Local road miles **35.9** 308th of 351 · 29.2 per 1,000 residents (41st of 351)	Town-owned bridges, replacement cost **$9.8M** scored exposure $2.9M · two in poor condition	Road-stream crossings **32** 312th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **18.7 sq mi** 14% state-owned	Seasonal homes **37%** share of housing units	Peak service population **1,999** residents plus seasonal	Core infrastructure index **5.60** roads, culverts, dams, coast, flood, energy

Burden index 2.06; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,615 acres** 13.5% of land area · FY2026	State-owned land PILOT, FY2026 **$374,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$232** statewide $117 · FY2026	New growth per resident **$34,287** FY2017–2025 · 84th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

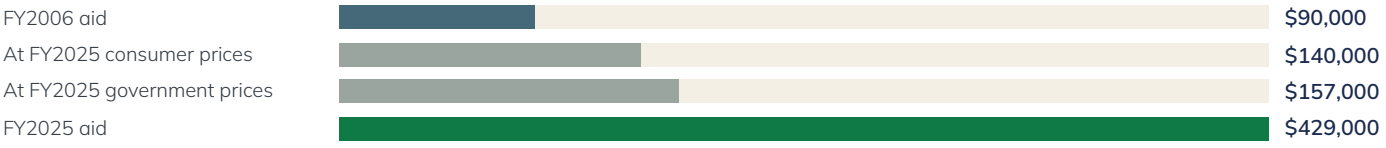
State aid covered 5.6% of Egremont's general-fund spending in FY2025, up from 3.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.2%** $90,000 of $2.8M · median town 14.1%	FY2016 **5.5%** $211,000 of $3.8M · median town 12.2%	FY2025 **5.6%** $429,000 of $7.6M · median town 11.5%	Net of state charges, FY2025 **5.6%** FY2010: 5.6% · median town 10.0%

Egremont's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $300,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Egremont's state aid kept pace with both price measures: FY2025 aid was 207.3% above its FY2006 aid grown by Boston-area consumer prices and 173.1% above grown by the government price index.



Gross state aid went from $90,000 in FY2006 to $429,000 in FY2025, +376.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+27.0%** $212,000 to $270,000 · all towns +54.0%	All fixed costs, FY2016–25 **+45.1%** $465,000 to $675,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Egremont's health insurance would have been $265,000 in FY2025; it was $270,000, $4,401 above the path. Its fixed costs would have been $581,000 in FY2025; it was $675,000, $94,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Egremont came to $0, 0.0% of the $57,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$435,000	7.6 times	42.3%
Everything placed	$435,000	7.6 times	45.2%

SCHOOLS

Egremont's required school contribution is 2.0% of median household income, 307th highest of 351.

Chapter 70 aid, FY2026 **$316,000** attributed to the town	Required local contribution **$1.1M** FY2026
Share of household income **2.0%** 307th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Egremont has no school district of its own. Its pupils attend Southern Berkshire; Egremont accounts for 14% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Egremont received $5.5 million in earmarks placed in the town and competitive grants over ten years, 28% more than the $4.3 million its size, need and institutions predict.

PEERS

Egremont ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Egremont this town	**51**	**$9,039**	**$3,748**	**$394**	**2.06**	**2.0%**
Erving peer · lowest in class of 30	50	$7,326	$3,750	$0	8.12	4.7%
West Stockbridge peer	43	$9,304	$478	$0	0.46	2.4%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Tolland peer	55	$10,826	$4,602	$11.32	1.82	1.1%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Erving

Town · Franklin County · 1,703 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Erving Public Schools, the town's own district

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Gill, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Erving scores 50 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

126th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	47	41	65

Rank under other weightings: 96th to 158th.

Near fair: between 45 and 55 under every weighting

Erving received less than its share of state aid on three of four measures; its blended score of 49 stays between 45 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

10th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	96	98

Rank under other weightings: 6th to 16th.

Stable high: above 55 under every weighting

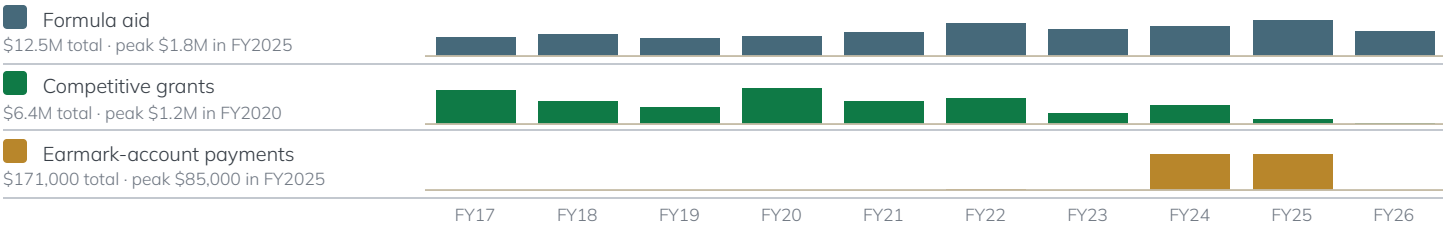
Erving received more than its share of discretionary money on all four measures; its blended score of 97 stays between 96 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Erving's town government and school districts received $12.5 million in formula aid and $6.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$12.5M	**$6.4M**	**$171,000**
$7,326 per resident (276th of 351) · gross	$3,750 per resident (25th of 351)	$100 per resident (22nd of 351)

Competitive grants to Erving were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.4 million, are not shown.

EARMARKS

No local earmark was placed in Erving in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $171,000 in payments to Erving's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Erving.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Erving's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Egremont	$0	$485,000	$485,000	$394
Richmond	$0	$0	$0	$0
West Stockbridge	$0	$0	$0	$0
Nahant	$2.3M	$453,000	$2.3M	$136
Wellfleet	$262,000	$262,000	$262,000	$59.49

WHAT THE TOWN CARRIES

Measured against what it maintains, Erving received 8.12 times its proportional share of competitive grant awards.

Local road miles **17.6** 340th of 351 · 10.3 per 1,000 residents (104th of 351)	Town-owned bridges, replacement cost **$6.5M** scored exposure $3M · two in poor condition	Road-stream crossings **46** 279th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.8 sq mi** 30% state-owned	Seasonal homes **2%** share of housing units	Peak service population **1,746** residents plus seasonal	Core infrastructure index **2.86** roads, culverts, dams, coast, flood, energy

Burden index 8.12; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,724 acres** 30.9% of land area · FY2026	State-owned land PILOT, FY2026 **$73,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$26.64** statewide $117 · FY2026	New growth per resident **$60,456** FY2017–2025 · 23rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.2% of Erving's general-fund spending in FY2025, the same share as in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.2%** $399,000 of $6.4M · median town 14.1%	FY2016 **7.5%** $634,000 of $8.5M · median town 12.2%	FY2025 **6.2%** $766,000 of $12.4M · median town 11.5%	Net of state charges, FY2025 **4.4%** FY2010: 9.4% · median town 10.0%

Erving's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $117,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Erving's state aid kept pace with both price measures: FY2025 aid was 23.7% above its FY2006 aid grown by Boston-area consumer prices and 10.0% above grown by the government price index.

Gross state aid went from $399,000 in FY2006 to $766,000 in FY2025, +91.9% in dollars. Flag: in FY2010, $578,000 of Erving's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+86.7%** $796,000 to $1.5M · all towns +54.0%	All fixed costs, FY2016–25 **+83.4%** $1.2M to $2.2M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Erving's health insurance would have been $994,000 in FY2025; it was $1.49 million, $492,000 above the path. Its fixed costs would have been $1.52 million in FY2025; it was $2.23 million, $712,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Erving came to $0, 0.0% of the $690,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Erving's required school contribution is 4.7% of median household income, 2nd highest of 351.

Chapter 70 aid, FY2026 **$726,000** to the town's district	Required local contribution **$2.6M** FY2026
Share of household income **4.7%** 2nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+35%** after inflation

Erving runs its own school district and also belongs to Franklin County; Erving accounts for 5% of that district's foundation budget.

EXPECTED AND ACTUAL

Erving received $6.4 million in earmarks placed in the town and competitive grants over ten years, 29% more than the $5 million its size, need and institutions predict.

PEERS

Erving is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Erving this town	**50**	**$7,326**	**$3,750**	**$0**	**8.12**	**4.7%**
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Richmond peer · lowest in class of 30	40	$8,072	$776	$0	0.19	2.2%
West Stockbridge peer	43	$9,304	$478	$0	0.46	2.4%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Essex

Town · Essex County · 3,701 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Essex · Andrew Tarr and Ann-Margaret Ferrante (until November 2025)

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Manchester Essex Regional School District, shared with Manchester-by-the-Sea

Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Essex scores 32 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

291st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	40	30	25

Rank under other weightings: 283rd to 296th.

Stable low: below 45 under every weighting

Essex received less than its share of state aid on all four measures; its blended score of 32 stays between 29 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100

147th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
67	74	34	59

Rank under other weightings: 129th to 176th.

Weighting-dependent: the range crosses the 45–55 band

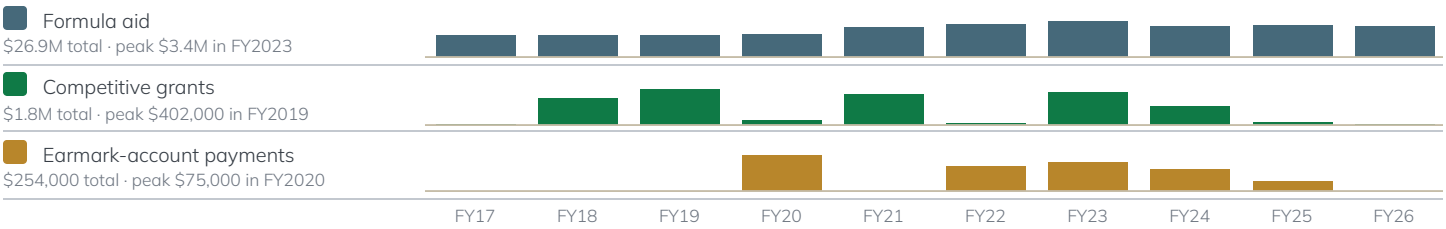
Essex received more than its share of discretionary money on three of four measures; its blended score of 59 stays between 51 and 66 under every weighting tested.

STATE MONEY, FY2017–FY2026

Essex's town government and school districts received $26.9 million in formula aid and $1.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$26.9M	$1.8M	$254,000
$7,261 per resident (279th of 351) · gross	$477 per resident (144th of 351)	$68.52 per resident (40th of 351)

Competitive grants to Essex peaked in FY2019 at $402,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.9 million, are not shown.

EARMARKS

Essex received $768,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$768,000	$768,000	$768,000	Not a member
$208 per resident (6th of 351)	$208 per resident (10th of 351)	$208 per resident (18th of 351)	35 municipalities had none

Placed in the town: 22 clauses in seven of ten budgets; the most recent in FY2026. Every one names Essex directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the Essex National Heritage Commission, Inc. for the Future Leaders program to employ underserved youth in the county of Essex"	Enacted names the town
FY2020	$100,000	"the Essex National Heritage Commission, Inc. for future leaders program to employ underserved youth in Essex"	Enacted names the town
FY2024	$75,000	"the rehabilitation of the recreation area known as the Centennial Grove in the town of Essex"	Enacted names the town
FY2023	$67,000 (split three ways)	"in support of Manchester-by-the-Sea's Confronting the Challenges of Climate Change project in the city of Gloucester and the towns of Essex and…"	Enacted names the town
FY2026	$60,000	"the town of Essex for a study relative to bridges in the town"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Essex received 75% of its proportional share of competitive grant awards.

Local road miles **23.2** 333rd of 351 · 6.3 per 1,000 residents (182nd of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $307,000 · none in poor condition	Road-stream crossings **51** 258th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.0 sq mi** 0% state-owned	Seasonal homes **12%** share of housing units	Peak service population **4,218** residents plus seasonal	Core infrastructure index **0.80** roads, culverts, dams, coast, flood, energy

Burden index 0.75; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **47 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$3,238** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$69.08** statewide $117 · FY2026	New growth per resident **$19,690** FY2017–2025 · 192nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.8% of Essex's general-fund spending in FY2025, down from 3.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.5%** $314,000 of $8.9M · median town 14.1%	FY2016 **1.9%** $271,000 of $13.9M · median town 12.2%	FY2025 **1.8%** $346,000 of $19.6M · median town 11.5%	Net of state charges, FY2025 **1.6%** FY2010: 1.9% · median town 10.0%

Essex's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Essex's state aid did not keep pace with either price measure: FY2025 aid was 29.0% below its FY2006 aid grown by Boston-area consumer prices and 36.9% below grown by the government price index.

Gross state aid went from $314,000 in FY2006 to $346,000 in FY2025, +10.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+67.1%** $421,000 to $703,000 · all towns +54.0%	All fixed costs, FY2016–25 **+53.4%** $894,000 to $1.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Essex's health insurance would have been $525,000 in FY2025; it was $703,000, $178,000 above the path. Its fixed costs would have been $1.12 million in FY2025; it was $1.37 million, $255,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Essex came to $672,000, 2.4 times the $282,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$672,000	2.4 times	28.2%
Placed in the town	$672,000	2.4 times	42.3%
Everything placed	$672,000	2.4 times	45.2%

SCHOOLS

Essex's required school contribution is 2.6% of median household income, 190th highest of 351.

Chapter 70 aid, FY2026 **$1.6M** attributed to the town	Required local contribution **$5.5M** FY2026
Share of household income **2.6%** 190th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Essex has no school district of its own. Its pupils attend Manchester Essex and Essex North Shore; Essex accounts for 42% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Essex received $4.8 million in earmarks placed in the town and competitive grants over ten years, 81% more than the $2.6 million its size, need and institutions predict.

PEERS

Essex ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Essex this town	**32**	**$7,261**	**$477**	**$208**	**0.75**	**2.6%**
Berlin peer	32	$7,567	$464	$89.70	2.37	2.7%
Boylston peer	32	$7,545	$121	$68.71	0.67	2.6%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Marion peer	30	$6,631	$643	$12.24	0.43	2.7%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Hinsdale lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Everett

City · Middlesex County · 50,045 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

28th Middlesex · Joseph W. McGonagle, Jr. 89% of residents

11th Suffolk · Judith A. Garcia 8% of residents

2nd Suffolk · Daniel J. Ryan 3% of residents

Everett is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Suffolk · Sal N. DiDomenico

SCHOOL DISTRICTS

Everett Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Everett scores 68 on the Fairness Index for all state aid and 54 for discretionary money. Fifty is a fair share.

ALL STATE AID

68 / 100

17th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	63	65	73

Rank under other weightings: 15th to 19th.

Stable high: above 55 under every weighting

Everett received more than its share of state aid on all four measures; its blended score of 68 stays between 66 and 70 under every weighting tested.

DISCRETIONARY MONEY ONLY

54 / 100

166th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	45	61	56

Rank under other weightings: 147th to 180th.

Weighting-dependent: the range crosses the 45–55 band

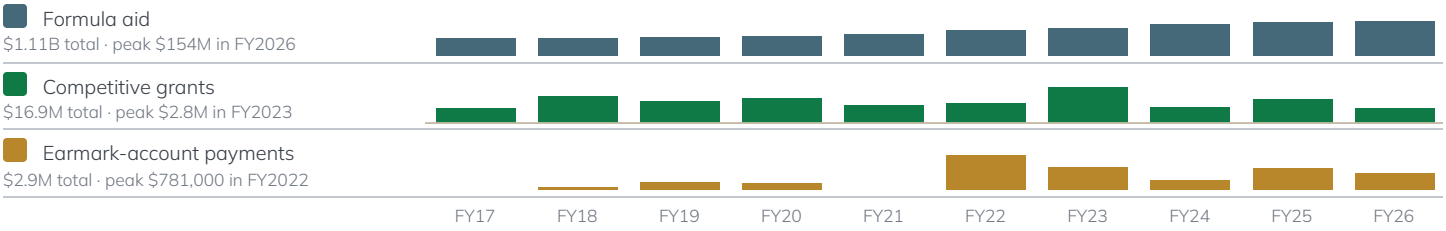
Everett received more than its share of discretionary money on three of four measures; its blended score of 54 stays between 51 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Everett's town government and school districts received $1.11 billion in formula aid and $16.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.11B	$16.9M	$2.9M
$22,244 per resident (18th of 351) · gross	$337 per resident (193rd of 351)	$57.83 per resident (62nd of 351)

Competitive grants to Everett were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $221 million, are not shown.

EARMARKS

Everett received $6.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$6.1M	$6.1M	$6.1M	Not a member
$121 per resident (27th of 351)	$121 per resident (47th of 351)	$121 per resident (52nd of 351)	35 municipalities had none

Placed in the town: 77 clauses in ten of ten budgets; the most recent in FY2026. Every one names Everett directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$1M (split three ways)	"the hazardous materials response team in the cities of Cambridge, Everett and Boston"	Enacted names the town
FY2017	$250,000	"public schools in the city of Everett"	Enacted names the town
FY2022	$200,000	"the music program at Everett high school in the city of Everett"	Enacted names the town
FY2022	$167,000 (split three ways)	"the hazardous materials response team in the cities of Cambridge, Everett and Boston"	Enacted names the town
FY2021	$167,000 (split three ways)	"the hazardous materials response team in the cities of Cambridge, Everett and Boston"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Everett received 2.38 times its proportional share of competitive grant awards.

Local road miles **58.1** 219th of 351 · 1.2 per 1,000 residents (348th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **2** 345th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **3.4 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **50,239** residents plus seasonal	Core infrastructure index **8.34** roads, culverts, dams, coast, flood, energy

Burden index 2.38; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$41,825** FY2017–2025 · 51st of 351 · median town $20,524

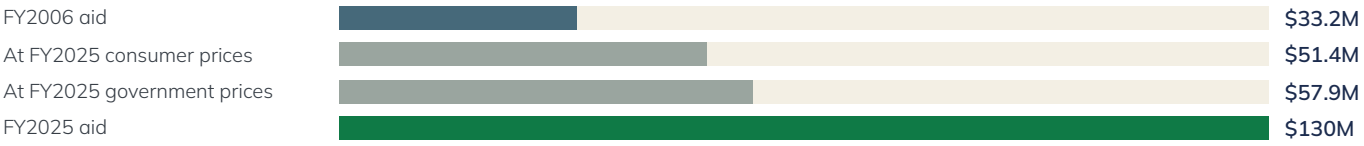
COSTS AND THE 2½% LIMIT

State aid covered 42.0% of Everett's general-fund spending in FY2025, up from 27.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.0%** $33.2M of $123M · median town 14.1%	FY2016 **41.8%** $73.4M of $176M · median town 12.2%	FY2025 **42.0%** $130M of $310M · median town 11.5%	Net of state charges, FY2025 **35.2%** FY2010: 24.8% · median town 10.0%

Everett's state aid kept pace with both price measures: FY2025 aid was 152.9% above its FY2006 aid grown by Boston-area consumer prices and 124.7% above grown by the government price index.



Gross state aid went from $33.2 million in FY2006 to $130 million in FY2025, +292.2% in dollars. Flag: in FY2010, $2.8 million of Everett's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+105.6%** $21.7M to $44.6M · all towns +54.0%	All fixed costs, FY2016–25 **+78.1%** $35.4M to $63.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Everett's health insurance would have been $27.1 million in FY2025; it was $44.6 million, $17.5 million above the path. Its fixed costs would have been $44.2 million in FY2025; it was $63.1 million, $18.8 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+41%); health insurance changed by more than 30% in one year in FY2019 (+71%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Everett came to $5.6 million, 24.4% of the $22.9 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$5.6M	24.4%	28.2%
Placed in the town	$5.6M	24.4%	42.3%
Everything placed	$5.6M	24.4%	45.2%

SCHOOLS

Everett's required school contribution is 3.1% of median household income, 52nd highest of 351.

Chapter 70 aid, FY2026 **$127M** to the town's district	Required local contribution **$45.8M** FY2026
Share of household income **3.1%** 52nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+37%** after inflation

Everett runs its own school district.

EXPECTED AND ACTUAL

Everett received $23.2 million in earmarks placed in the town and competitive grants over ten years, 23% more than the $18.8 million its size, need and institutions predict.

PEERS

Everett ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Everett this town	**68**	**$22,244**	**$337**	**$121**	**2.38**	**3.1%**
Taunton peer	59	$17,881	$149	$94.33	0.82	2.7%
Amherst peer	36	$8,017	$722	$84.88	2.44	3.7%
Leominster peer	58	$16,497	$382	$54.84	1.58	2.5%
Westfield peer	52	$14,111	$235	$64.11	0.63	2.6%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Salem best in class of 30	46	$10,823	$853	$157	2.62	2.9%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Fairhaven

Town · Bristol County · 15,903 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Bristol · Mark D. Sylvia

STATE SENATE

Second Bristol and Plymouth · Mark C. Montigny

SCHOOL DISTRICTS

Fairhaven Public Schools, the town's own district

Greater New Bedford Regional Vocational Technical School District, vocational, shared with Dartmouth and New Bedford

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Fairhaven scores 47 on the Fairness Index for all state aid and 58 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

150th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	40	47	57

Rank under other weightings: 110th to 184th.

Weighting-dependent: the range crosses the 45–55 band

Fairhaven received less than its share of state aid on three of four measures; its blended score of 47 stays between 44 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

58 / 100

149th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	53	51	69

Rank under other weightings: 137th to 167th.

Weighting-dependent: the range crosses the 45–55 band

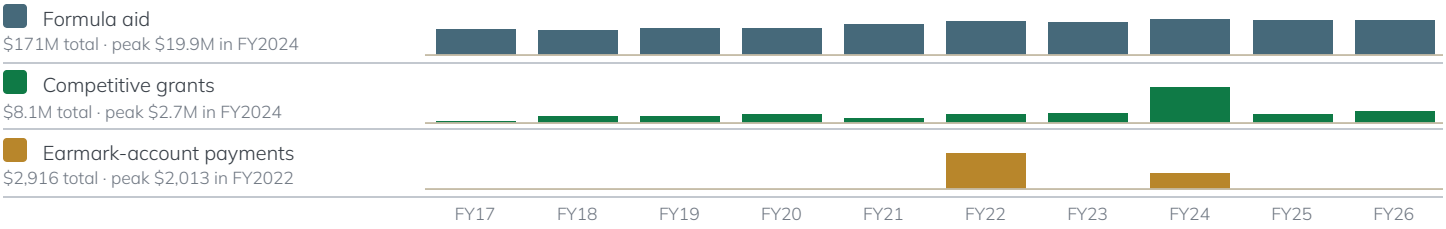
Fairhaven received more than its share of discretionary money on all four measures; its blended score of 58 stays between 54 and 61 under every weighting tested.

STATE MONEY, FY2017–FY2026

Fairhaven's town government and school districts received $171 million in formula aid and $8.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$171M	**$8.1M**	**$2,916**
$10,747 per resident (155th of 351) · gross	$508 per resident (138th of 351)	$0.18 per resident (337th of 351)

Competitive grants to Fairhaven peaked in FY2024 at $2.7 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $15.9 million, are not shown.

EARMARKS

Fairhaven received $25,000 in local earmarks naming the town, $200,000 placed in the town and $200,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$25,000	**$200,000**	**$200,000**	**Not a member**
$1.57 per resident (312th of 351)	$12.58 per resident (300th of 351)	$12.58 per resident (301st of 351)	35 municipalities had none

Placed in the town: eight clauses in seven of ten budgets; the most recent in FY2026. $25,000 came in clauses that name Fairhaven; the other $175,000 went to organizations based in Fairhaven, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$25,000	"the Whitfield-Manjiro Friendship Society, Inc"	Enacted recipient based here
FY2026	$25,000	"the Fairhaven senior center for kitchen renovation and upgrades"	Enacted names the town
FY2025	$25,000	"the Whitfield-Manjiro Friendship Society, Inc"	Enacted recipient based here
FY2024	$25,000	"Whitfield-Manjiro Friendship Society, Inc"	Enacted recipient based here
FY2023	$25,000	"the Whitfield-Manjiro Friendship Society, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Fairhaven received 36% of its proportional share of competitive grant awards.

Local road miles **82.1** 148th of 351 · 5.2 per 1,000 residents (222nd of 351)	Town-owned bridges, replacement cost **$5.4M** scored exposure $2.9M · none in poor condition	Road-stream crossings **54** 246th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.4 sq mi** 5% state-owned	Seasonal homes **4%** share of housing units	Peak service population **16,536** residents plus seasonal	Core infrastructure index **0.34** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **403 acres** 5.1% of land area · FY2026	State-owned land PILOT, FY2026 **$311,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$772** statewide $117 · FY2026	New growth per resident **$12,073** FY2017–2025 · 292nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 21.1% of Fairhaven's general-fund spending in FY2025, down from 29.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **29.0%** $10.7M of $37M · median town 14.1%	FY2016 **25.3%** $11.4M of $45.2M · median town 12.2%	FY2025 **21.1%** $13.4M of $63.3M · median town 11.5%	Net of state charges, FY2025 **20.0%** FY2010: 27.7% · median town 10.0%

Fairhaven's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Fairhaven's state aid did not keep pace with either price measure: FY2025 aid was 19.8% below its FY2006 aid grown by Boston-area consumer prices and 28.7% below grown by the government price index.

Gross state aid went from $10.7 million in FY2006 to $13.4 million in FY2025, +24.4% in dollars. Flag: in FY2010, $1 million of Fairhaven's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.7%** $6.1M to $8.1M · all towns +54.0%	All fixed costs, FY2016–25 **+47.8%** $7.4M to $10.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Fairhaven's health insurance would have been $7.60 million in FY2025; it was $8.13 million, $536,000 above the path. Its fixed costs would have been $9.23 million in FY2025; it was $10.9 million, $1.70 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Fairhaven came to $0, 0.0% of the $2.05 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$150,000	7.3%	42.3%
Everything placed	$150,000	7.3%	45.2%

SCHOOLS

Fairhaven's required school contribution is 2.8% of median household income, 141st highest of 351.

Chapter 70 aid, FY2026 **$11.7M** to the town's district	Required local contribution **$18.8M** FY2026
Share of household income **2.8%** 141st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Fairhaven runs its own school district and also belongs to Greater New Bedford and Bristol County; Fairhaven accounts for 8% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Fairhaven received $8.5 million in earmarks placed in the town and competitive grants over ten years, 87% of the $9.7 million its size, need and institutions predict.

PEERS

Fairhaven ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Fairhaven this town	**47**	**$10,747**	**$508**	**$12.58**	**0.36**	**2.8%**
Ayer peer	45	$10,265	$930	$112	1.63	3.1%
Easthampton peer	41	$9,515	$1,083	$51.82	3.73	2.9%
Carver peer · lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Great Barrington best in class of 30	42	$9,461	$2,113	$175	2.92	3.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Fall River

City · Bristol County · 94,082 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Bristol · Alan Silvia 45% of residents
6th Bristol · Carole A. Fiola 44% of residents
8th Bristol · Steven J. Ouellette 11% of residents

Fall River is split among three House districts. Shares are of 2020 residents.

STATE SENATE

First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS

Fall River Public Schools, the city's own district
Greater Fall River Regional Vocational Technical School District, vocational, shared with Somerset, Swansea and Westport

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Fall River scores 72 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

72 / 100

10th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
74	63	70	81

Rank under other weightings: 7th to 11th.

Stable high: above 55 under every weighting

Fall River received more than its share of state aid on all four measures; its blended score of 72 stays between 69 and 75 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100

169th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	41	55	63

Rank under other weightings: 148th to 188th.

Weighting-dependent: the range crosses the 45–55 band

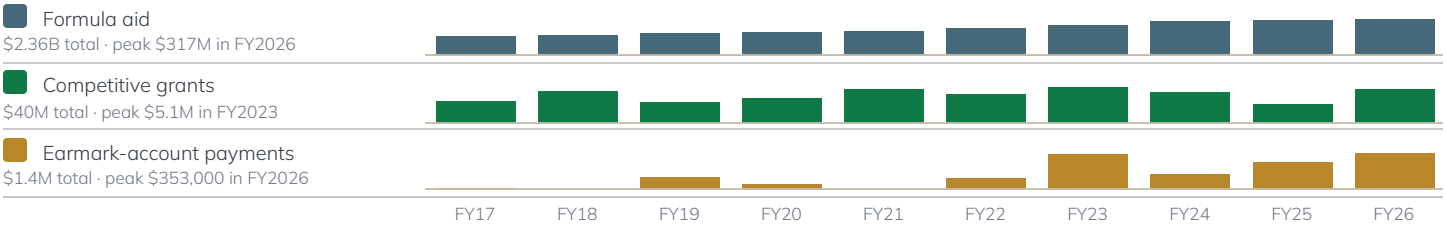
Fall River received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 49 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Fall River's town government and school districts received $2.36 billion in formula aid and $40 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.36B	$40M	$1.4M
$25,031 per resident (10th of 351) · gross	$426 per resident (158th of 351)	$14.70 per resident (231st of 351)

Competitive grants to Fall River were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $113 million, are not shown.

EARMARKS

Fall River received $3.5 million in local earmarks naming the town, $7.3 million placed in the town and $8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.5M	$7.3M	$8M	Not a member
$37.25 per resident (200th of 351)	$77.65 per resident (101st of 351)	$85.09 per resident (100th of 351)	35 municipalities had none

Placed in the town: 74 clauses in ten of ten budgets; the most recent in FY2026. $3.4 million came in clauses that name Fall River; the other $3.9 million went to organizations based in Fall River, some of which serve a wider area.

Names the town includes $75,000 in clauses that name Fall River but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $700,000 in ten clauses for state facilities located in Fall River (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$500,000	"the Children's Advocacy Center of Bristol County, Inc"	Enacted recipient based here
FY2020	$500,000	"the Children's Advocacy Center of Bristol County, Inc"	Enacted recipient based here
FY2018	$400,000	"the Children's Advocacy Center of Bristol County, Inc"	Enacted recipient based here
FY2017	$400,000	"the Children's Advocacy Center of Bristol County, Inc"	Enacted recipient based here
FY2025	$300,000	"Fall River Emergency Medical Services for home health visits to support emergency room diversion"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Fall River received 89% of its proportional share of competitive grant awards.

Local road miles **228.2** 11th of 351 · 2.4 per 1,000 residents (330th of 351)	Town-owned bridges, replacement cost **$13.4M** scored exposure $5.4M · two in poor condition	Road-stream crossings **148** 42nd of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **33.1 sq mi** 20% state-owned	Seasonal homes **0%** share of housing units	Peak service population **94,467** residents plus seasonal	Core infrastructure index **0.31** roads, culverts, dams, coast, flood, energy

Burden index 0.89; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,832 acres** 22.8% of land area · FY2026	State-owned land PILOT, FY2026 **$665,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$138** statewide $117 · FY2026	New growth per resident **$11,343** FY2017–2025 · 302nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 56.3% of Fall River's general-fund spending in FY2025, up from 53.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **53.5%** $122M of $229M · median town 14.1%	FY2016 **54.0%** $134M of $248M · median town 12.2%	FY2025 **56.3%** $242M of $430M · median town 11.5%	Net of state charges, FY2025 **47.0%** FY2010: 53.7% · median town 10.0%

Fall River's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $20.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Fall River's state aid kept pace with both price measures: FY2025 aid was 27.6% above its FY2006 aid grown by Boston-area consumer prices and 13.4% above grown by the government price index.

Gross state aid went from $122 million in FY2006 to $242 million in FY2025, +97.8% in dollars. Flag: in FY2010, $4.4 million of Fall River's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+137.6%** $32M to $76.1M · all towns +54.0%	All fixed costs, FY2016–25 **+132.2%** $43.3M to $100M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Fall River's health insurance would have been $40 million in FY2025; it was $76.1 million, $36.1 million above the path. Its fixed costs would have been $54 million in FY2025; it was $100 million, $46.4 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+58%); health insurance changed by more than 30% in one year in FY2017 (+74%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Fall River came to $3.2 million, 7.2% of the $44.1 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.2M	7.2%	28.2%
Placed in the town	$6.7M	15.2%	42.3%
Everything placed	$7.4M	16.7%	45.2%

SCHOOLS

Fall River's required school contribution is 2.0% of median household income, 311th highest of 351.

Chapter 70 aid, FY2026 **$252M** to the town's district	Required local contribution **$47.2M** FY2026
Share of household income **2.0%** 311th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+36%** after inflation

Fall River runs its own school district and also belongs to Greater Fall River and Bristol County; Fall River accounts for 72% and 10% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Fall River received $49.4 million in earmarks placed in the town and competitive grants over ten years, 90% of the $55 million its size, need and institutions predict.

PEERS

Fall River ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Fall River this town	**72**	**$25,031**	**$426**	**$77.65**	**0.89**	**2.0%**
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Lynn peer	72	$27,652	$300	$97.57	1.51	2.5%
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Falmouth

Town · Barnstable County · 33,039 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Barnstable · David T. Vieira 66% of residents
Barnstable-Dukes-Nantucket · Thomas W. Moakley 34% of residents

Falmouth is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Falmouth Public Schools, the town's own district
Upper Cape Cod Regional Vocational Technical School District, vocational, shared with Bourne, Marion, Sandwich and Wareham

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Falmouth scores 22 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

22 / 100

348th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	21	27	19

Rank under other weightings: 347th to 349th.

Stable low: below 45 under every weighting

Falmouth received less than its share of state aid on all four measures; its blended score of 22 stays between 21 and 23 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

300th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	26	21	23

Rank under other weightings: 289th to 302nd.

Stable low: below 45 under every weighting

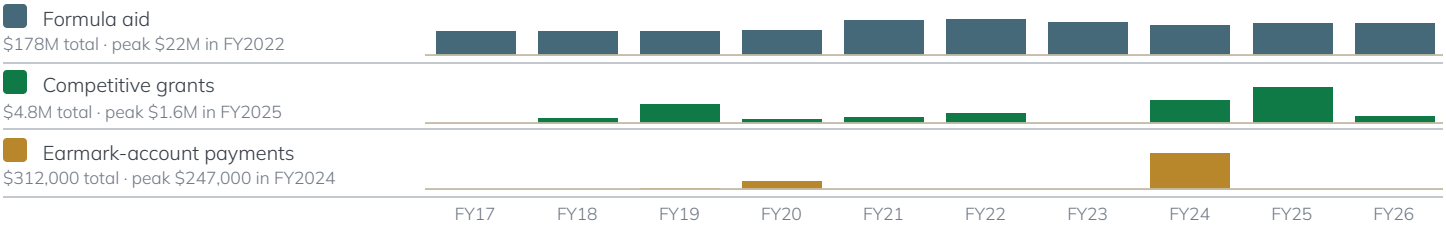
Falmouth received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

Falmouth's town government and school districts received $178 million in formula aid and $4.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$178M	**$4.8M**	**$312,000**
$5,383 per resident (340th of 351) · gross	$146 per resident (295th of 351)	$9.43 per resident (263rd of 351)

Competitive grants to Falmouth peaked in FY2025 at $1.6 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $53 million, are not shown.

EARMARKS

Falmouth received $2.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.2M	**$2.2M**	**$2.2M**	**Not a member**
$66.46 per resident (95th of 351)	$66.46 per resident (123rd of 351)	$66.46 per resident (129th of 351)	35 municipalities had none

Placed in the town: 32 clauses in seven of ten budgets; the most recent in FY2026. Every one names Falmouth directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$350,000	"the Falmouth housing authority for the repair and renovation of affordable housing in the town of Falmouth"	Enacted names the town
FY2026	$200,000	"research and education at the Marine Biological Laboratory in the town of Falmouth"	Enacted names the town
FY2025	$200,000	"research and education at The Marine Biological Laboratory in Woods Hole in the town of Falmouth"	Enacted names the town
FY2022	$200,000	"the development and implementation of science, technology, engineering and mathematics educational and skills training opportunities for public…"	Enacted names the town
FY2017	$175,000	"shellfish propagation in Barnstable, Dukes and Nantucket counties to be administered jointly by the director of marine fisheries and counties"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Falmouth received 76% of its proportional share of competitive grant awards.

Local road miles **231.1** 10th of 351 · 7.0 per 1,000 residents (159th of 351)	Town-owned bridges, replacement cost **$39.9M** scored exposure $7.5M · none in poor condition	Road-stream crossings **81** 161st of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **44.1 sq mi** 8% state-owned	Seasonal homes **28%** share of housing units	Peak service population **46,847** residents plus seasonal	Core infrastructure index **0.41** roads, culverts, dams, coast, flood, energy

Burden index 0.76; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,490 acres** 8.8% of land area · FY2026	State-owned land PILOT, FY2026 **$871,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$350** statewide $117 · FY2026	New growth per resident **$44,290** FY2017–2025 · 48th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.9% of Falmouth's general-fund spending in FY2025, down from 9.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.1%** $8.3M of $90.9M · median town 14.1%	FY2016 **8.0%** $10M of $126M · median town 12.2%	FY2025 **7.9%** $14.3M of $179M · median town 11.5%	Net of state charges, FY2025 **4.8%** FY2010: 7.4% · median town 10.0%

Falmouth's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $762,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Falmouth's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 11.3% above its FY2006 aid grown by Boston-area consumer prices and 1.1% below grown by the government price index.

Gross state aid went from $8.3 million in FY2006 to $14.3 million in FY2025, +72.6% in dollars. Flag: in FY2010, $1.5 million of Falmouth's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.2%** $11.1M to $16.6M · all towns +54.0%	All fixed costs, FY2016–25 **+56.7%** $19.5M to $30.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Falmouth's health insurance would have been $13.9 million in FY2025; it was $16.6 million, $2.70 million above the path. Its fixed costs would have been $24.3 million in FY2025; it was $30.5 million, $6.20 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Falmouth came to $1.9 million, 34.5% of the $5.46 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.9M	34.5%	28.2%
Placed in the town	$1.9M	34.5%	42.3%
Everything placed	$1.9M	34.5%	45.2%

SCHOOLS

Falmouth's required school contribution is 2.9% of median household income, 106th highest of 351.

Chapter 70 aid, FY2026 **$10.9M** to the town's district	Required local contribution **$40M** FY2026
Share of household income **2.9%** 106th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+51%** after inflation

Falmouth runs its own school district and also belongs to Upper Cape Cod; Falmouth accounts for 24% of that district's foundation budget.

EXPECTED AND ACTUAL

Falmouth received $8.8 million in earmarks placed in the town and competitive grants over ten years, 47% of the $18.5 million its size, need and institutions predict.

PEERS

Falmouth ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Falmouth this town	**22**	**$5,383**	**$146**	**$66.46**	**0.76**	**2.9%**
Gloucester peer	28	$6,787	$774	$137	2.12	3.6%
Bourne peer	30	$6,777	$185	$55.96	0.51	2.9%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Fitchburg

City · Worcester County · 41,798 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Worcester · Michael P. Kushmerek

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

Fitchburg Public Schools, the city's own district

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Gardner, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Fitchburg scores 68 on the Fairness Index for all state aid and 74 for discretionary money. Fifty is a fair share.

ALL STATE AID

68 / 100

15th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	60	68	74

Rank under other weightings: 14th to 22nd.

Stable high: above 55 under every weighting

Fitchburg received more than its share of state aid on all four measures; its blended score of 68 stays between 65 and 71 under every weighting tested.

DISCRETIONARY MONEY ONLY

74 / 100

88th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	65	78	79

Rank under other weightings: 85th to 101st.

Stable high: above 55 under every weighting

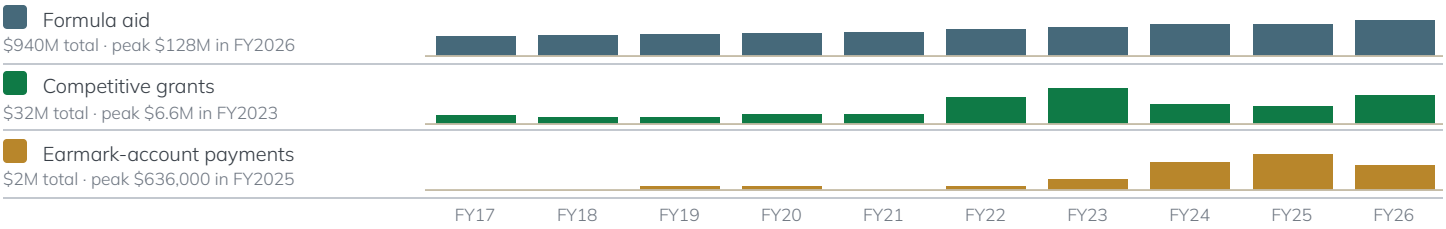
Fitchburg received more than its share of discretionary money on all four measures; its blended score of 74 stays between 72 and 77 under every weighting tested.

STATE MONEY, FY2017–FY2026

Fitchburg's town government and school districts received $940 million in formula aid and $32 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$940M	**$32M**	**$2M**
$22,494 per resident (15th of 351) · gross	$765 per resident (101st of 351)	$47.42 per resident (83rd of 351)

Competitive grants to Fitchburg peaked in FY2023 at $6.6 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $53.8 million, are not shown.

EARMARKS

Fitchburg received $4.9 million in local earmarks naming the town, $4.9 million placed in the town and $9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.9M	**$4.9M**	**$9M**	**Not a member**
$117 per resident (29th of 351)	$118 per resident (48th of 351)	$216 per resident (15th of 351)	35 municipalities had none

Placed in the town: 44 clauses in nine of ten budgets; the most recent in FY2026. $4.6 million came in clauses that name Fitchburg; the other $355,000 went to organizations based in Fitchburg, some of which serve a wider area.

Names the town includes $300,000 in clauses that name Fitchburg but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $4.1 million in three clauses for state facilities located in Fitchburg (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$750,000	"the Fitchburg Redevelopment Authority for downtown housing and economic development"	Enacted names the town
FY2025	$750,000	"the Fitchburg Redevelopment Authority for downtown housing and economic development"	Enacted names the town
FY2024	$750,000	"not less than $750,000 shall be extended to the Fitchburg Redevelopment Authority for downtown redevelopment efforts in the city of Fitchburg"	Enacted names the town
FY2026	$304,000	"the city of Fitchburg for downtown housing development"	Enacted names the town
FY2023	$290,000	"the city of Fitchburg for downtown housing production"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Fitchburg received 2.33 times its proportional share of competitive grant awards.

Local road miles **180.6** 24th of 351 · 4.3 per 1,000 residents (268th of 351)	Town-owned bridges, replacement cost **$58.9M** scored exposure $19.4M · two in poor condition	Road-stream crossings **154** 34th of 351 · culverts and small crossings	Town-owned hazard dams **16** high or significant hazard
Land area **27.8 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **41,865** residents plus seasonal	Core infrastructure index **1.24** roads, culverts, dams, coast, flood, energy

Burden index 2.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **242 acres** 1.4% of land area · FY2026	State-owned land PILOT, FY2026 **$99,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$410** statewide $117 · FY2026	New growth per resident **$10,657** FY2017–2025 · 311th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 51.0% of Fitchburg's general-fund spending in FY2025, up from 50.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **50.1%** $51.3M of $102M · median town 14.1%	FY2016 **51.6%** $58.6M of $114M · median town 12.2%	FY2025 **51.0%** $91.3M of $179M · median town 11.5%	Net of state charges, FY2025 **46.4%** FY2010: 47.9% · median town 10.0%

Fitchburg's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $6.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Fitchburg's state aid kept pace with both price measures: FY2025 aid was 14.7% above its FY2006 aid grown by Boston-area consumer prices and 1.9% above grown by the government price index.

Gross state aid went from $51.3 million in FY2006 to $91.3 million in FY2025, +77.9% in dollars. Flag: in FY2010, $2.8 million of Fitchburg's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+84.3%** $16.4M to $30.2M · all towns +54.0%	All fixed costs, FY2016–25 **+76.3%** $24.9M to $44M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Fitchburg's health insurance would have been $20.5 million in FY2025; it was $30.2 million, $9.74 million above the path. Its fixed costs would have been $31.2 million in FY2025; it was $44 million, $12.8 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Fitchburg came to $3.5 million, 25.1% of the $13.8 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.5M	25.1%	28.2%
Placed in the town	$3.7M	26.9%	42.3%
Everything placed	$3.8M	27.3%	45.2%

SCHOOLS

Fitchburg's required school contribution is 2.1% of median household income, 296th highest of 351.

Chapter 70 aid, FY2026 **$92.6M** to the town's district	Required local contribution **$26.1M** FY2026
Share of household income **2.1%** 296th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+30%** after inflation

Fitchburg runs its own school district and also belongs to Montachusett; Fitchburg accounts for 27% of that district's foundation budget.

EXPECTED AND ACTUAL

Fitchburg received $41.1 million in earmarks placed in the town and competitive grants over ten years, 75% more than the $23.5 million its size, need and institutions predict.

PEERS

Fitchburg ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Fitchburg this town	**68**	**$22,494**	**$765**	**$118**	**2.33**	**2.1%**
Holyoke peer	78	$31,543	$801	$93.22	1.95	1.7%
Chicopee peer · lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
Chelsea peer	77	$32,370	$919	$147	3.69	2.6%
Gardner peer	60	$17,461	$784	$85.79	2.19	2.3%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Florida

Town · Berkshire County · 668 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Florida Public Schools, the town's own district
Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Lanesborough, Monroe, North Adams, Savoy and Williamstown

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Florida scores 64 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

64 / 100

29th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	65	48	78

Rank under other weightings: 15th to 50th.

Stable high: above 55 under every weighting

Florida received more than its share of state aid on three of four measures; its blended score of 64 stays between 59 and 68 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100

57th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
87	87	76	93

Rank under other weightings: 49th to 61st.

Stable high: above 55 under every weighting

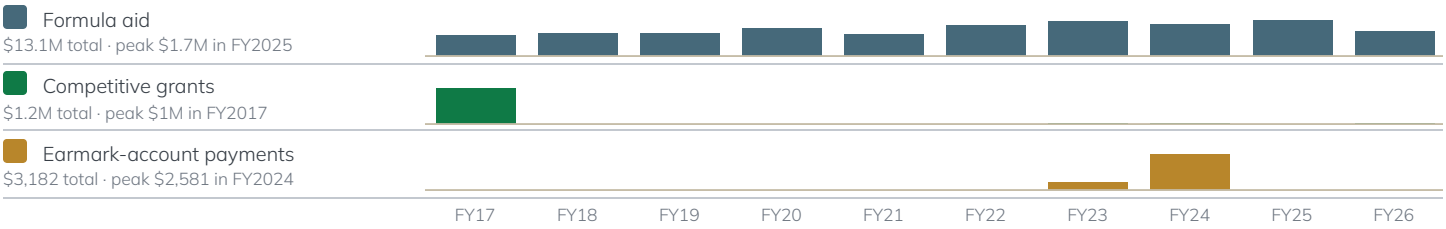
Florida received more than its share of discretionary money on all four measures; its blended score of 86 stays between 83 and 88 under every weighting tested.

STATE MONEY, FY2017–FY2026

Florida's town government and school districts received $13.1 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$13.1M	$1.2M	$3,182
$19,543 per resident (28th of 351) · gross	$1,744 per resident (52nd of 351)	$4.76 per resident (289th of 351)

Competitive grants to Florida peaked in FY2017 at $1 million, 86% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 668 residents, a single payment moves Florida's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $863,000, are not shown.

EARMARKS

No local earmark was placed in Florida in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $3,182 in payments to Florida's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Florida.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Florida's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Leyden	$100,000	$100,000	$100,000	$157
New Braintree	$290,000	$290,000	$290,000	$298
Petersham	$0	$0	$0	$0
Heath	$50,000	$50,000	$50,000	$65.36
Goshen	$75,000	$75,000	$75,000	$81.97

WHAT THE TOWN CARRIES

Measured against what it maintains, Florida received 14% of its proportional share of competitive grant awards.

Local road miles **39.8** 293rd of 351 · 59.6 per 1,000 residents (14th of 351)	Town-owned bridges, replacement cost **$5.9M** scored exposure $567,000 · none in poor condition	Road-stream crossings **69** 200th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **24.4 sq mi** 35% state-owned	Seasonal homes **5%** share of housing units	Peak service population **704** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.14; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,391 acres** 34.6% of land area · FY2026	State-owned land PILOT, FY2026 **$76,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$14.07** statewide $117 · FY2026	New growth per resident **$37,964** FY2017–2025 · 67th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

The Division of Local Services shows no FY2025 general-fund spending for Florida; in FY2016 state aid covered 21.1% of it.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.6%** $553,000 of $2.3M · median town 14.1%	FY2016 **21.1%** $679,000 of $3.2M · median town 12.2%	FY2025 not reported aid $898,000; spending not reported · median town 11.5%	Net of state charges, FY2025 not reported FY2010: 19.7% · median town 10.0%

Florida's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $345,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Florida's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 4.7% above its FY2006 aid grown by Boston-area consumer prices and 6.9% below grown by the government price index.

Gross state aid went from $553,000 in FY2006 to $898,000 in FY2025, +62.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +53.0%	Years squeezed **1 of 8** fixed costs grew faster than allowed levy growth · one year not reported	Health insurance **0 of 8** years it grew faster than allowed levy growth · one year not reported

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Florida's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	not reported	28.2%
Placed in the town	$0	not reported	42.3%
Everything placed	$0	not reported	45.2%

SCHOOLS

Florida's required school contribution is 3.2% of median household income, 36th highest of 351.

Chapter 70 aid, FY2026 **$862,000** to the town's district	Required local contribution **$836,000** FY2026
Share of household income **3.2%** 36th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+21%** after inflation

Florida runs its own school district and also belongs to Northern Berkshire; Florida accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Florida received $1.3 million in earmarks placed in the town and competitive grants over ten years, 55% of the $2.3 million its size, need and institutions predict.

PEERS

Florida is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Florida this town	**64**	**$19,543**	**$1,744**	**$0**	**0.14**	**3.2%**
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Petersham peer · lowest in class of 30	56	$19,509	$612	$0	0.99	2.7%
Heath peer	70	$20,313	$6,568	$65.36	0.84	1.5%
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Foxborough

Town · Norfolk County · 18,615 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Bristol · Michael S. Chaisson

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Foxborough Public Schools, the town's own district

Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Mansfield, Norton, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Foxborough scores 34 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

272nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	39	31	33

Rank under other weightings: 258th to 285th.

Stable low: below 45 under every weighting

Foxborough received less than its share of state aid on all four measures; its blended score of 34 stays between 33 and 35 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

326th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
17	20	14	16

Rank under other weightings: 323rd to 329th.

Stable low: below 45 under every weighting

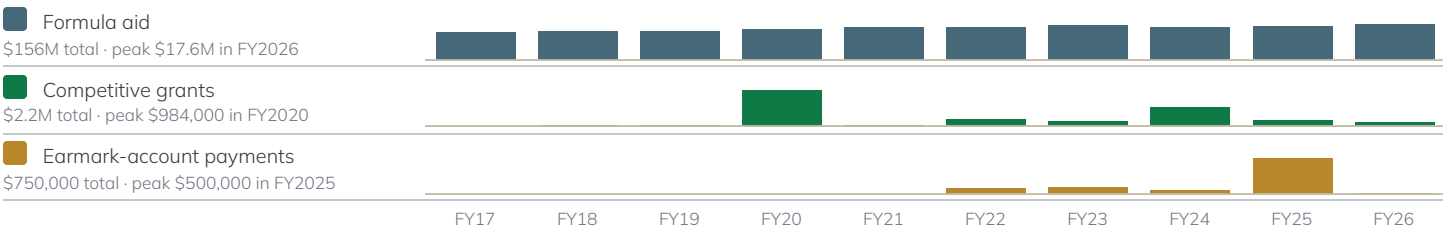
Foxborough received less than its share of discretionary money on all four measures; its blended score of 17 stays between 16 and 18 under every weighting tested.

STATE MONEY, FY2017–FY2026

Foxborough's town government and school districts received $156 million in formula aid and $2.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$156M	**$2.2M**	**$750,000**
$8,398 per resident (240th of 351) · gross	$121 per resident (312th of 351)	$40.29 per resident (109th of 351)

Competitive grants to Foxborough peaked in FY2020 at $984,000, 44% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $37.9 million, are not shown.

EARMARKS

Foxborough received $589,000 in local earmarks naming the town, $1.3 million placed in the town and $1.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$589,000	**$1.3M**	**$1.4M**	**Not a member**
$31.65 per resident (224th of 351)	$70.60 per resident (111th of 351)	$73.28 per resident (115th of 351)	35 municipalities had none

Placed in the town: 21 clauses in nine of ten budgets; the most recent in FY2026. $539,000 came in clauses that name Foxborough; the other $775,000 went to organizations based in Foxborough, some of which serve a wider area.

Names the town includes $50,000 in clauses that name Foxborough but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Foxborough (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$150,000	"the Massachusetts Marine Trades Association for workforce development training opportunities and technical education in secondary and post-secondary..."	Enacted recipient based here
FY2025	$150,000	"the Massachusetts Marine Trades Association, Inc. to increase workforce development training opportunities and technical education in secondary and..."	Enacted recipient based here
FY2024	$150,000	"Massachusetts Marine Trades Association for workforce development training opportunities and technical education in secondary and post-secondary..."	Enacted recipient based here
FY2023	$150,000	"the Massachusetts Marine Trades Association to increase workforce development training opportunities and technical education in secondary and..."	Enacted recipient based here
FY2020	$100,000	"the Massachusetts Marine Trades Association to increase workforce development training opportunities and technical education in secondary and..."	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Foxborough received 1.08 times its proportional share of competitive grant awards.

Local road miles **93.4** 114th of 351 · 5.0 per 1,000 residents (230th of 351)	Town-owned bridges, replacement cost **$1.1M** scored exposure $333,000 · none in poor condition	Road-stream crossings **147** 46th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **19.9 sq mi** 6% state-owned	Seasonal homes **0%** share of housing units	Peak service population **18,615** residents plus seasonal	Core infrastructure index **0.74** roads, culverts, dams, coast, flood, energy

Burden index 1.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **530 acres** 4.2% of land area · FY2026	State-owned land PILOT, FY2026 **$199,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$375** statewide $117 · FY2026	New growth per resident **$32,635** FY2017–2025 · 93rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.1% of Foxborough's general-fund spending in FY2025, down from 18.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.0%** $8.7M of $48.2M · median town 14.1%	FY2016 **16.6%** $10.6M of $64.2M · median town 12.2%	FY2025 **13.1%** $12.2M of $92.9M · median town 11.5%	Net of state charges, FY2025 **10.1%** FY2010: 17.6% · median town 10.0%

Foxborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $237,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Foxborough's state aid did not keep pace with either price measure: FY2025 aid was 9.6% below its FY2006 aid grown by Boston-area consumer prices and 19.7% below grown by the government price index.

Gross state aid went from $8.7 million in FY2006 to $12.2 million in FY2025, +40.1% in dollars. Flag: in FY2010, $666,000 of Foxborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.0%** $6.5M to $9M · all towns +54.0%	All fixed costs, FY2016–25 **+65.4%** $10.5M to $17.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Foxborough's health insurance would have been $8.07 million in FY2025; it was $9.05 million, $979,000 above the path. Its fixed costs would have been $13.2 million in FY2025; it was $17.4 million, $4.27 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (+91%), FY2020 (+54%) and FY2021 (−63%); health insurance changed by more than 30% in one year in FY2018 (+145%) and FY2021 (−63%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Foxborough came to $477,000, 18.4% of the $2.59 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$477,000	18.4%	28.2%
Placed in the town	$1.1M	40.7%	42.3%
Everything placed	$1.1M	42.6%	45.2%

SCHOOLS

Foxborough's required school contribution is 3.7% of median household income, 7th highest of 351.

Chapter 70 aid, FY2026 **$10.4M** to the town's district	Required local contribution **$30.8M** FY2026
Share of household income **3.7%** 7th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–13%** after inflation

Foxborough runs its own school district and also belongs to Southeastern and Norfolk County; Foxborough accounts for 3% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Foxborough received $8.2 million in earmarks placed in the town and competitive grants over ten years, 14% more than the $7.2 million its size, need and institutions predict.

PEERS

Foxborough ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Foxborough this town	**34**	**$8,398**	**$121**	**$70.60**	**1.08**	**3.7%**
Easton peer	30	$7,249	$236	$53.96	1.08	3.3%
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Seekonk peer	31	$7,825	$53.68	$16.99	1.67	3.0%
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Holden lowest in class of 30	49	$13,276	$103	$15.70	0.39	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Framingham

City · Middlesex County · 72,399 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Middlesex · Priscila S. Sousa 58% of residents
7th Middlesex · Jack Patrick Lewis 32% of residents
4th Middlesex · Danielle W. Gregoire 8% of residents
19th Worcester · Kate Donaghue 2% of residents

Framingham is split among four House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS

Framingham Public Schools, the city's own district
South Middlesex Regional Vocational Technical School District, vocational, shared with Ashland, Holliston, Hopkinton and Natick

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Framingham scores 54 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

54 / 100

94th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	52	52	56

Rank under other weightings: 86th to 103rd.

Near fair: between 45 and 55 under every weighting

Framingham received more than its share of state aid on all four measures; its blended score of 53 stays between 52 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

238th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	34	39	38

Rank under other weightings: 222nd to 249th.

Stable low: below 45 under every weighting

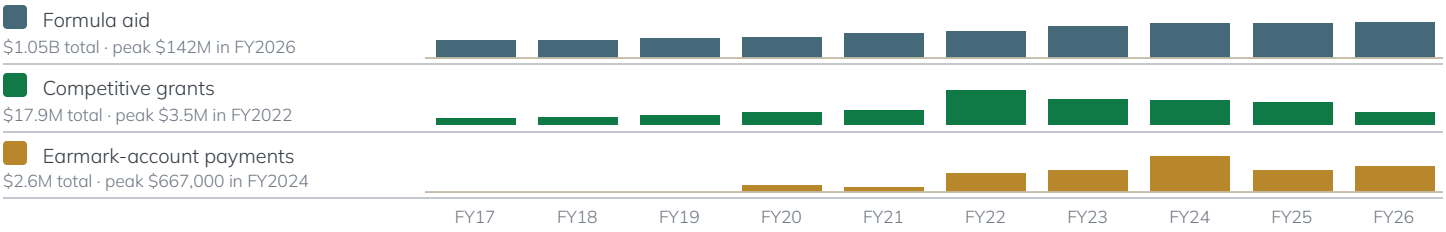
Framingham received less than its share of discretionary money on all four measures; its blended score of 37 stays between 36 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Framingham's town government and school districts received $1.05 billion in formula aid and $17.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.05B	**$17.9M**	**$2.6M**
$14,513 per resident (84th of 351) · gross	$248 per resident (227th of 351)	$35.27 per resident (127th of 351)

Competitive grants to Framingham were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $80.4 million, are not shown.

EARMARKS

Framingham received $3.7 million in local earmarks naming the town, $11.4 million placed in the town and $16.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.7M	**$11.4M**	**$16.5M**	**Not a member**
$51.11 per resident (145th of 351)	$157 per resident (19th of 351)	$227 per resident (13th of 351)	35 municipalities had none

Placed in the town: 85 clauses in ten of ten budgets; the most recent in FY2026. $3.7 million came in clauses that name Framingham; the other $7.7 million went to organizations based in Framingham, some of which serve a wider area.

Everything placed, the third measure, adds $5.1 million in two clauses for state facilities located in Framingham (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$1.1M	"United Way of Tri-County, Inc.'s Mass 211 and Call 2 Talk programs"	Enacted recipient based here
FY2025	$1.1M	"United Way of Tri-County, Inc.'s Call 2 Talk program"	Enacted recipient based here
FY2024	$1.1M	"the United Way of Tri-County's Call 2 Talk program"	Enacted recipient based here
FY2020	$300,000	"social and emotional learning programming at the Framingham Public Schools"	Enacted names the town
FY2018	$300,000	"mitigate student overcrowding in Framingham Public Schools"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Framingham received 72% of its proportional share of competitive grant awards.

Local road miles **218.0** 12th of 351 · 3.0 per 1,000 residents (317th of 351)	Town-owned bridges, replacement cost **$53.4M** scored exposure $9.3M · none in poor condition	Road-stream crossings **161** 33rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **25.0 sq mi** 9% state-owned	Seasonal homes **1%** share of housing units	Peak service population **72,814** residents plus seasonal	Core infrastructure index **1.75** roads, culverts, dams, coast, flood, energy

Burden index 0.72; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **971 acres** 6.1% of land area · FY2026	State-owned land PILOT, FY2026 **$911,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$938** statewide $117 · FY2026	New growth per resident **$16,956** FY2017–2025 · 228th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

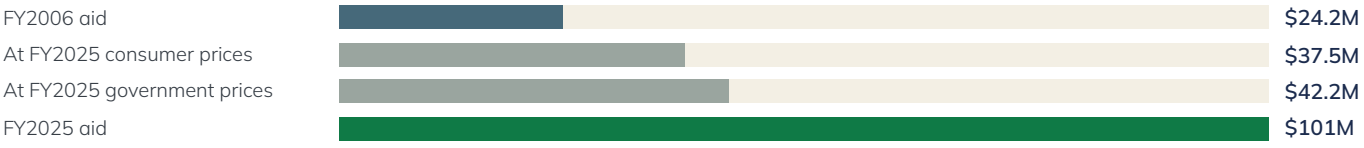
State aid covered 28.6% of Framingham's general-fund spending in FY2025, up from 13.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.8%** $24.2M of $175M · median town 14.1%	FY2016 **19.8%** $50.6M of $255M · median town 12.2%	FY2025 **28.6%** $101M of $352M · median town 11.5%	Net of state charges, FY2025 **26.2%** FY2010: 12.9% · median town 10.0%

Framingham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Framingham's state aid kept pace with both price measures: FY2025 aid was 168.4% above its FY2006 aid grown by Boston-area consumer prices and 138.6% above grown by the government price index.



Gross state aid went from $24.2 million in FY2006 to $101 million in FY2025, +316.3% in dollars. Flag: in FY2010, $2.7 million of Framingham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+23.3%** $34M to $41.9M · all towns +54.0%	All fixed costs, FY2016–25 **+49.0%** $47.3M to $70.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Framingham's health insurance would have been $42.5 million in FY2025; it was $41.9 million, $531,000 below the path. Its fixed costs would have been $59.1 million in FY2025; it was $70.5 million, $11.4 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Framingham came to $3.2 million, 40.1% of the $7.93 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.2M	40.1%	28.2%
Placed in the town	$9.4M	118.3%	42.3%
Everything placed	$14.5M	182.6%	45.2%

SCHOOLS

Framingham's required school contribution is 3.1% of median household income, 49th highest of 351.

Chapter 70 aid, FY2026 **$101M** to the town's district	Required local contribution **$89.2M** FY2026
Share of household income **3.1%** 49th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+51%** after inflation

Framingham runs its own school district and also belongs to South Middlesex; Framingham accounts for 76% of that district's foundation budget.

EXPECTED AND ACTUAL

Framingham received $31 million in earmarks placed in the town and competitive grants over ten years, about the $30.1 million its size, need and institutions predict.

PEERS

Framingham ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Framingham this town	**54**	**$14,513**	**$248**	**$157**	**0.72**	**3.1%**
Methuen peer	56	$15,084	$205	$59.13	0.39	2.6%
Peabody peer	39	$9,164	$124	$37.72	0.34	3.1%
Haverhill peer	58	$16,056	$523	$98.18	2.11	2.7%
Malden peer	51	$13,164	$195	$58.55	1.64	2.4%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Fairhaven lowest in class of 30	47	$10,747	$508	$12.58	0.36	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Franklin

City · Norfolk County · 33,154 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
10th Norfolk · Jeffrey N. Roy

STATE SENATE
Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS
Franklin Public Schools, the city's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Medfield, Medway, Millis, Norfolk, North Attleborough, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Franklin scores 49 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

127th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	57	42	50

Rank under other weightings: 113th to 141st.

Near fair: between 45 and 55 under every weighting

Franklin received less than its share of state aid on two of four measures; its blended score of 49 stays between 47 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

236th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	41	37	35

Rank under other weightings: 230th to 244th.

Stable low: below 45 under every weighting

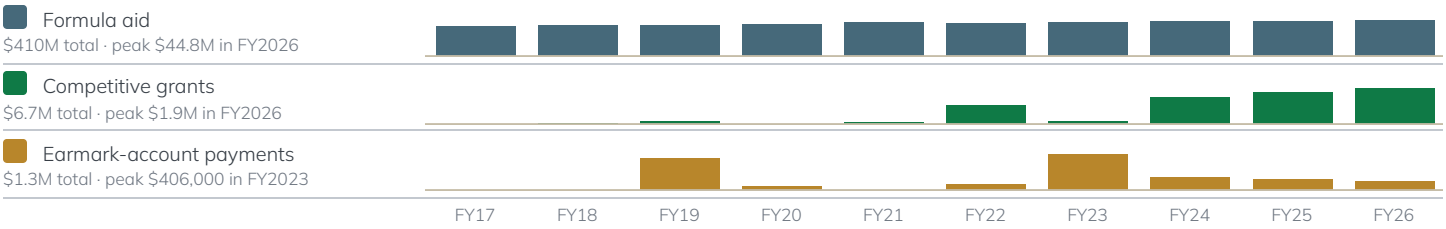
Franklin received less than its share of discretionary money on all four measures; its blended score of 37 stays between 35 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Franklin's town government and school districts received $410 million in formula aid and $6.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$410M	$6.7M	$1.3M
$12,355 per resident (124th of 351) · gross	$201 per resident (252nd of 351)	$38.26 per resident (117th of 351)

Competitive grants to Franklin peaked in FY2026 at $1.9 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.9 million, are not shown.

EARMARKS

Franklin received $2.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.4M	$2.4M	$2.4M	Not a member
$73.18 per resident (80th of 351)	$73.18 per resident (107th of 351)	$73.18 per resident (117th of 351)	35 municipalities had none

Placed in the town: 49 clauses in ten of ten budgets; the most recent in FY2026. Every one names Franklin directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$200,000	"improvements to the King street memorial park in the city known as the town of Franklin"	Enacted names the town
FY2024	$150,000	"the Franklin Performing Arts Company, Inc"	Enacted names the town
FY2026	$100,000	"the Franklin Performing Arts Company, Inc"	Enacted names the town
FY2026	$100,000	"the SAFE Coalition Incorporated to provide support, education, treatment options and coping mechanisms for those affected by substance use disorder..."	Enacted names the town
FY2025	$100,000	"the Franklin Performing Arts Company, Inc"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Franklin received 69% of its proportional share of competitive grant awards.

Local road miles **142.0** 39th of 351 · 4.3 per 1,000 residents (270th of 351)	Town-owned bridges, replacement cost **$6.6M** scored exposure $2.3M · none in poor condition	Road-stream crossings **108** 102nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **26.6 sq mi** 5% state-owned	Seasonal homes **1%** share of housing units	Peak service population **33,348** residents plus seasonal	Core infrastructure index **0.17** roads, culverts, dams, coast, flood, energy

Burden index 0.69; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **797 acres** 4.7% of land area · FY2026	State-owned land PILOT, FY2026 **$240,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$301** statewide $117 · FY2026	New growth per resident **$26,680** FY2017–2025 · 128th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 22.7% of Franklin's general-fund spending in FY2025, down from 34.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **34.3%** $28.5M of $83.1M · median town 14.1%	FY2016 **29.1%** $31.5M of $108M · median town 12.2%	FY2025 **22.7%** $34M of $150M · median town 11.5%	Net of state charges, FY2025 **17.9%** FY2010: 30.9% · median town 10.0%

Franklin's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Franklin's state aid did not keep pace with either price measure: FY2025 aid was 23.1% below its FY2006 aid grown by Boston-area consumer prices and 31.6% below grown by the government price index.

Gross state aid went from $28.5 million in FY2006 to $34 million in FY2025, +19.3% in dollars. Flag: in FY2010, $1 million of Franklin's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.9%** $3.9M to $5.5M · all towns +54.0%	All fixed costs, FY2016–25 **+66.3%** $9.2M to $15.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Franklin's health insurance would have been $4.86 million in FY2025; it was $5.48 million, $621,000 above the path. Its fixed costs would have been $11.5 million in FY2025; it was $15.3 million, $3.81 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Franklin came to $2.1 million, 129.1% of the $1.59 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.1M	129.1%	28.2%
Placed in the town	$2.1M	129.1%	42.3%
Everything placed	$2.1M	129.1%	45.2%

SCHOOLS

Franklin's required school contribution is 3.1% of median household income, 50th highest of 351.

Chapter 70 aid, FY2026 **$31.6M** to the town's district	Required local contribution **$55.7M** FY2026
Share of household income **3.1%** 50th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Franklin runs its own school district and also belongs to Tri County and Norfolk County; Franklin accounts for 18% and 7% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Franklin received $9.4 million in earmarks placed in the town and competitive grants over ten years, about the $9 million its size, need and institutions predict.

PEERS

Franklin ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Franklin this town	**49**	**$12,355**	**$201**	**$73.18**	**0.69**	**3.1%**
Mansfield peer	46	$11,457	$163	$30.37	0.28	3.4%
Tewksbury peer	38	$8,861	$181	$57.89	0.24	2.8%
Shrewsbury peer	36	$8,418	$158	$25.41	0.74	3.1%
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Braintree best in class of 30	39	$9,109	$142	$117	0.55	3.4%
Uxbridge lowest in class of 30	48	$11,199	$436	$15.55	1.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Freetown

Town · Bristol County · 9,285 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Bristol · Steven J. Ouellette 66% of residents
6th Bristol · Carole A. Fiola 34% of residents

Freetown is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS

Freetown-Lakeville Regional School District, shared with Lakeville
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Dighton, Middleborough, Raynham, Rehoboth and Taunton

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Freetown scores 44 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

174th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	54	38	41

Rank under other weightings: 161st to 200th.

Weighting-dependent: the range crosses the 45–55 band

Freetown received less than its share of state aid on three of four measures; its blended score of 44 stays between 41 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100

224th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	52	30	38

Rank under other weightings: 219th to 238th.

Stable low: below 45 under every weighting

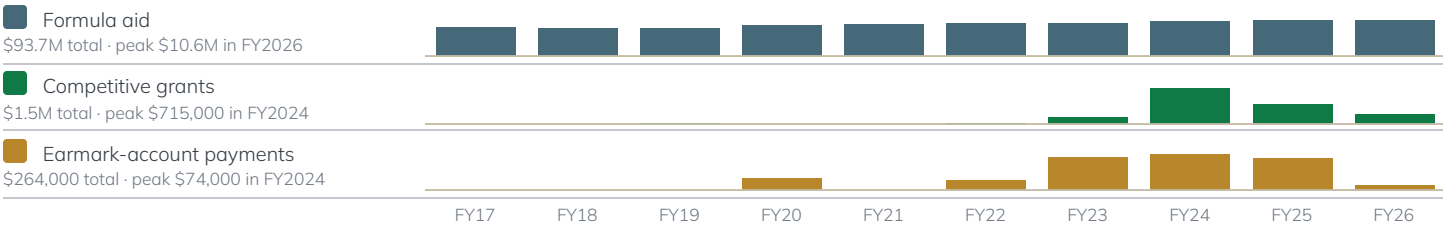
Freetown received less than its share of discretionary money on three of four measures; its blended score of 40 stays between 36 and 43 under every weighting tested.

STATE MONEY, FY2017–FY2026

Freetown's town government and school districts received $93.7 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$93.7M	$1.5M	$264,000
$10,093 per resident (175th of 351) · gross	$164 per resident (271st of 351)	$28.45 per resident (152nd of 351)

Competitive grants to Freetown peaked in FY2024 at $715,000, 47% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.8 million, are not shown.

EARMARKS

Freetown received $1.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.4M	$1.4M	$1.4M	Not a member
$147 per resident (19th of 351)	$147 per resident (30th of 351)	$147 per resident (36th of 351)	35 municipalities had none

Placed in the town: 20 clauses in eight of ten budgets; the most recent in FY2026. Every one names Freetown directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$250,000	"as a grant to the Crystal Springs school in the town of Freetown to support programs and services for children, adolescents and young adults with…"	Enacted names the town
FY2025	$250,000	"as a grant to the Crystal Springs school in the town of Freetown to support programs and services for children, adolescents and young adults with…"	Enacted names the town
FY2024	$250,000	"as a grant to the Crystal Springs school in the town of Freetown to support programs and services for children, adolescents and young adults with…"	Enacted names the town
FY2026	$130,000	"the purchase body-worn cameras for the police department in the town of Freetown"	Enacted names the town
FY2023	$75,000	"the town of Freetown to conduct an updated feasibility study for the new town hall and to paint the Old School House"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Freetown received 30% of its proportional share of competitive grant awards.

Local road miles **77.7** 165th of 351 · 8.4 per 1,000 residents (130th of 351)	Town-owned bridges, replacement cost **$9.2M** scored exposure $1.9M · none in poor condition	Road-stream crossings **75** 180th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **34.5 sq mi** 25% state-owned	Seasonal homes **0%** share of housing units	Peak service population **9,285** residents plus seasonal	Core infrastructure index **0.01** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,080 acres** 23.0% of land area · FY2026	State-owned land PILOT, FY2026 **$403,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$79.34** statewide $117 · FY2026	New growth per resident **$29,813** FY2017–2025 · 107th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

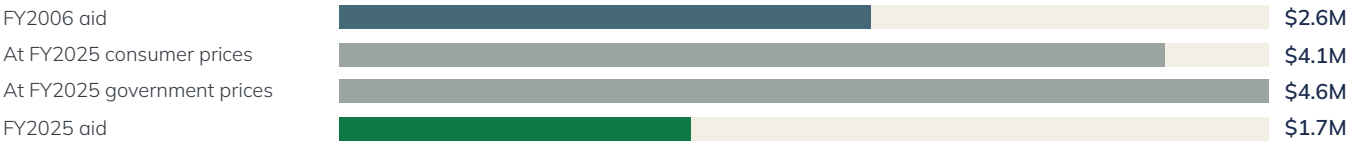
State aid covered 5.5% of Freetown's general-fund spending in FY2025, down from 15.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.5%** $2.6M of $16.9M · median town 14.1%	FY2016 **9.7%** $2.1M of $21.9M · median town 12.2%	FY2025 **5.5%** $1.7M of $31.7M · median town 11.5%	Net of state charges, FY2025 **4.5%** FY2010: 15.6% · median town 10.0%

Freetown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Freetown's state aid did not keep pace with either price measure: FY2025 aid was 57.4% below its FY2006 aid grown by Boston-area consumer prices and 62.1% below grown by the government price index.



Gross state aid went from $2.6 million in FY2006 to $1.7 million in FY2025, −33.9% in dollars. Flag: in FY2010, $530,000 of Freetown's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.2%** $1.3M to $1.9M · all towns +54.0%	All fixed costs, FY2016–25 **+59.0%** $2.4M to $3.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Freetown's health insurance would have been $1.59 million in FY2025; it was $1.92 million, $334,000 above the path. Its fixed costs would have been $2.96 million in FY2025; it was $3.77 million, $807,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Freetown came to $955,000, 146.9% of the $650,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$955,000	146.9%	28.2%
Placed in the town	$955,000	146.9%	42.3%
Everything placed	$955,000	146.9%	45.2%

SCHOOLS

Freetown's required school contribution is 2.8% of median household income, 137th highest of 351.

Chapter 70 aid, FY2026 **$5.6M** attributed to the town	Required local contribution **$13M** FY2026
Share of household income **2.8%** 137th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–14%** after inflation

Freetown has no school district of its own. Its pupils attend Freetown, Freetown-Lakeville, Bristol Plymouth and Bristol County; Freetown accounts for 100%, 42%, 6% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Freetown received $3.4 million in earmarks placed in the town and competitive grants over ten years, 72% of the $4.7 million its size, need and institutions predict.

PEERS

Freetown ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Freetown this town	**44**	**$10,093**	**$164**	**$147**	**0.30**	**2.8%**
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Groveland peer	52	$13,007	$476	$36.55	0.95	2.5%
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Dighton peer	56	$15,030	$168	$76.89	0.53	2.4%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Gardner

City · Worcester County · 21,148 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Worcester · Jonathan D. Zlotnik

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Gardner Public Schools, the city's own district

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Harvard, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Gardner scores 60 on the Fairness Index for all state aid and 72 for discretionary money. Fifty is a fair share.

ALL STATE AID

60 / 100

44th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	50	63	65

Rank under other weightings: 33rd to 61st.

Stable high: above 55 under every weighting

Gardner received more than its share of state aid on three of four measures; its blended score of 60 stays between 58 and 63 under every weighting tested.

DISCRETIONARY MONEY ONLY

72 / 100

101st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
74	63	74	76

Rank under other weightings: 92nd to 116th.

Stable high: above 55 under every weighting

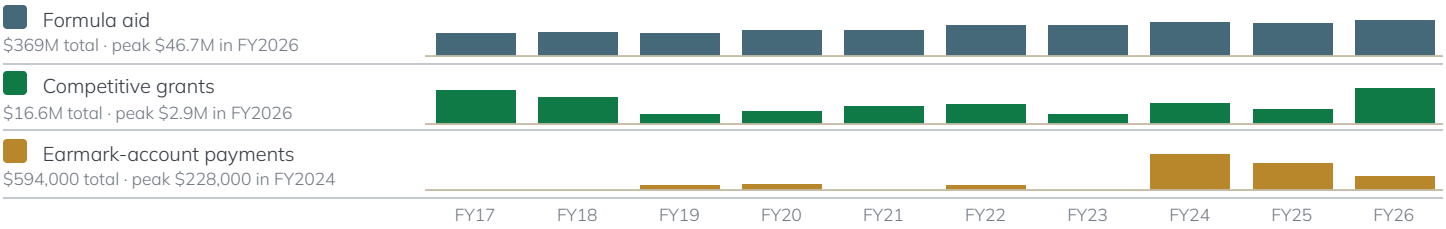
Gardner received more than its share of discretionary money on all four measures; its blended score of 72 stays between 70 and 74 under every weighting tested.

STATE MONEY, FY2017–FY2026

Gardner's town government and school districts received $369 million in formula aid and $16.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$369M	$16.6M	$594,000
$17,461 per resident (45th of 351) · gross	$784 per resident (97th of 351)	$28.08 per resident (154th of 351)

Competitive grants to Gardner were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18.3 million, are not shown.

EARMARKS

Gardner received $843,000 in local earmarks naming the town, $1.8 million placed in the town and $2 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$843,000	$1.8M	$2M	Not a member
$39.88 per resident (188th of 351)	$85.79 per resident (93rd of 351)	$95.25 per resident (85th of 351)	35 municipalities had none

Placed in the town: 23 clauses in nine of ten budgets; the most recent in FY2026. $843,000 came in clauses that name Gardner; the other $971,000 went to organizations based in Gardner, some of which serve a wider area.

Everything placed, the third measure, adds $200,000 in two clauses for state facilities located in Gardner (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000	"the Montachusett Veterans Outreach Center, Inc. for supportive housing programs and operational functions"	Enacted recipient based here
FY2020	$124,000	"the women's housing program at the Montachusett Veterans Outreach Center, Inc"	Enacted recipient based here
FY2019	$124,000	"the operation of the Montachusett Veterans Outreach Center women's housing program"	Enacted recipient based here
FY2018	$124,000	"the operation of the women's housing program at the Montachusett Veterans Outreach Center, Inc"	Enacted recipient based here
FY2017	$124,000	"the operation of the Montachusett Veterans Outreach Center women's housing program"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Gardner received 2.19 times its proportional share of competitive grant awards.

Local road miles **94.7** 108th of 351 · 4.5 per 1,000 residents (261st of 351)	Town-owned bridges, replacement cost **$20M** scored exposure $7.1M · four in poor condition	Road-stream crossings **117** 82nd of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **22.1 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **21,148** residents plus seasonal	Core infrastructure index **0.70** roads, culverts, dams, coast, flood, energy

Burden index 2.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,178 acres** 8.3% of land area · FY2026	State-owned land PILOT, FY2026 **$99,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$83.90** statewide $117 · FY2026	New growth per resident **$9,754** FY2017–2025 · 327th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 44.6% of Gardner's general-fund spending in FY2025, down from 55.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **55.9%** $24.2M of $43.3M · median town 14.1%	FY2016 **49.6%** $25.4M of $51.1M · median town 12.2%	FY2025 **44.6%** $36.6M of $82.1M · median town 11.5%	Net of state charges, FY2025 **42.3%** FY2010: 50.8% · median town 10.0%

Gardner's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Gardner's state aid did not keep pace with either price measure: FY2025 aid was 2.4% below its FY2006 aid grown by Boston-area consumer prices and 13.2% below grown by the government price index.

Gross state aid went from $24.2 million in FY2006 to $36.6 million in FY2025, +51.4% in dollars. Flag: in FY2010, $808,000 of Gardner's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+87.9%** $8.8M to $16.6M · all towns +54.0%	All fixed costs, FY2016–25 **+80.6%** $11.3M to $20.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Gardner's health insurance would have been $11 million in FY2025; it was $16.6 million, $5.58 million above the path. Its fixed costs would have been $14.1 million in FY2025; it was $20.3 million, $6.28 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Gardner came to $643,000, 8.3% of the $7.78 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$643,000	8.3%	28.2%
Placed in the town	$1.5M	19.1%	42.3%
Everything placed	$1.7M	21.7%	45.2%

SCHOOLS

Gardner's required school contribution is 2.3% of median household income, 283rd highest of 351.

Chapter 70 aid, FY2026 **$34.7M** to the town's district	Required local contribution **$13.6M** FY2026
Share of household income **2.3%** 283rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+23%** after inflation

Gardner runs its own school district and also belongs to Montachusett; Gardner accounts for 11% of that district's foundation budget.

EXPECTED AND ACTUAL

Gardner received $18.9 million in earmarks placed in the town and competitive grants over ten years, 34% more than the $14.1 million its size, need and institutions predict.

PEERS

Gardner ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Gardner this town	**60**	**$17,461**	**$784**	**$85.79**	**2.19**	**2.3%**
Southbridge peer	68	$21,891	$992	$33.72	1.54	2.3%
Greenfield peer	53	$14,180	$1,705	$134	4.81	2.9%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
Holyoke peer	78	$31,543	$801	$93.22	1.95	1.7%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Warren lowest in class of 30	67	$20,879	$1,969	$10.98	1.67	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Georgetown

Town · Essex County · 8,474 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Essex · Kristin E. Kassner

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Georgetown Public Schools, the town's own district

Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Georgetown scores 46 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

157th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	57	39	43

Rank under other weightings: 142nd to 178th.

Weighting-dependent: the range crosses the 45–55 band

Georgetown received less than its share of state aid on three of four measures; its blended score of 45 stays between 43 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

295th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	32	23	21

Rank under other weightings: 286th to 299th.

Stable low: below 45 under every weighting

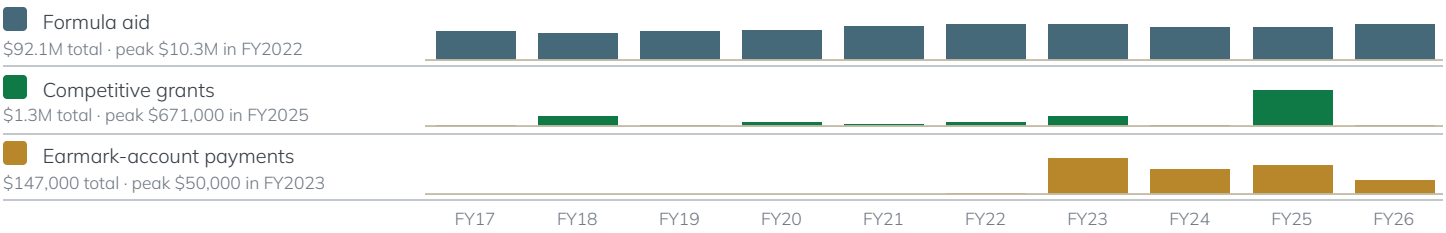
Georgetown received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 26 under every weighting tested.

STATE MONEY, FY2017–FY2026

Georgetown's town government and school districts received $92.1 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$92.1M	$1.3M	$147,000
$10,873 per resident (152nd of 351) · gross	$155 per resident (287th of 351)	$17.33 per resident (218th of 351)

Competitive grants to Georgetown peaked in FY2025 at $671,000, 51% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.9 million, are not shown.

EARMARKS

Georgetown received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	$225,000	$225,000	Not a member
$26.52 per resident (244th of 351)	$26.52 per resident (255th of 351)	$26.52 per resident (256th of 351)	35 municipalities had none

Placed in the town: ten clauses in seven of ten budgets; the most recent in FY2026. Every one names Georgetown directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$30,000	"the town of Georgetown for a bridge feasibility study of the Mill street bridge"	Enacted names the town
FY2020	$30,000	"a youth community center in the town of Georgetown"	Enacted names the town
FY2023	$25,000	"the treatment of invasive species in the Pentucket pond and Rock pond in the town of Georgetown"	Enacted names the town
FY2023	$25,000	"repairs to the parking lot at town hall in the town of Georgetown"	Enacted names the town
FY2021	$23,000 (split 11 ways)	"equally to the city of Gloucester and the towns of Boxford, Essex, Georgetown, Groveland, Hamilton, Ipswich, Manchester-by-the-Sea, Middleton…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Georgetown received 60% of its proportional share of competitive grant awards.

Local road miles **56.7** 223rd of 351 · 6.7 per 1,000 residents (168th of 351)	Town-owned bridges, replacement cost **$3.3M** scored exposure $322,000 · none in poor condition	Road-stream crossings **87** 148th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **12.9 sq mi** 13% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,474** residents plus seasonal	Core infrastructure index **1.01** roads, culverts, dams, coast, flood, energy

Burden index 0.60; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,153 acres** 14.0% of land area · FY2026	State-owned land PILOT, FY2026 **$256,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$222** statewide $117 · FY2026	New growth per resident **$16,167** FY2017–2025 · 239th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 20.0% of Georgetown's general-fund spending in FY2025, down from 31.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **31.5%** $5.8M of $18.5M · median town 14.1%	FY2016 **23.2%** $6.4M of $27.5M · median town 12.2%	FY2025 **20.0%** $7.2M of $36.2M · median town 11.5%	Net of state charges, FY2025 **19.0%** FY2010: 25.6% · median town 10.0%

Georgetown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $276,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Georgetown's state aid did not keep pace with either price measure: FY2025 aid was 19.9% below its FY2006 aid grown by Boston-area consumer prices and 28.8% below grown by the government price index.

Gross state aid went from $5.8 million in FY2006 to $7.2 million in FY2025, +24.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.6%** $2.8M to $3.5M · all towns +54.0%	All fixed costs, FY2016–25 **+53.9%** $4.7M to $7.3M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Georgetown's health insurance would have been $3.54 million in FY2025; it was $3.48 million, $64,000 below the path. Its fixed costs would have been $5.89 million in FY2025; it was $7.25 million, $1.37 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Georgetown came to $205,000, 31.9% of the $642,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$205,000	31.9%	28.2%
Placed in the town	$205,000	31.9%	42.3%
Everything placed	$205,000	31.9%	45.2%

SCHOOLS

Georgetown's required school contribution is 2.7% of median household income, 155th highest of 351.

Chapter 70 aid, FY2026 **$6.3M** to the town's district	Required local contribution **$13.3M** FY2026
Share of household income **2.7%** 155th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Georgetown runs its own school district and also belongs to Whittier; Georgetown accounts for 5% of that district's foundation budget.

EXPECTED AND ACTUAL

Georgetown received $1.5 million in earmarks placed in the town and competitive grants over ten years, 52% of the $3 million its size, need and institutions predict.

PEERS

Georgetown ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Georgetown this town	**46**	**$10,873**	**$155**	**$26.52**	**0.60**	**2.7%**
Millis peer	39	$9,221	$150	$151	0.75	2.6%
Rutland peer	59	$17,290	$124	$22.03	0.61	2.2%
Uxbridge peer	48	$11,199	$436	$15.55	1.22	2.8%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Berkley lowest in class of 30	51	$12,903	$95.35	$13.91	0.18	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Gill

Town · Franklin County · 1,740 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Gill-Montague Regional School District, shared with Montague

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Greenfield, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Gill scores 40 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

208th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	34	48	41

Rank under other weightings: 173rd to 257th.

Stable low: below 45 under every weighting

Gill received less than its share of state aid on all four measures; its blended score of 40 stays between 38 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

249th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	32	32	39

Rank under other weightings: 232nd to 266th.

Stable low: below 45 under every weighting

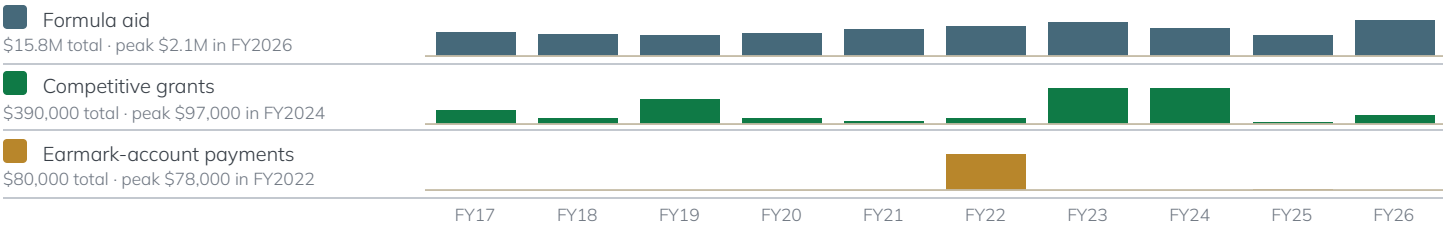
Gill received less than its share of discretionary money on all four measures; its blended score of 34 stays between 33 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Gill's town government and school districts received $15.8 million in formula aid and $390,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$15.8M	**$390,000**	**$80,000**
$9,063 per resident (218th of 351) · gross	$224 per resident (240th of 351)	$46.01 per resident (87th of 351)

Competitive grants to Gill peaked in FY2024 at $97,000, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

Gill received $88,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$88,000	**$88,000**	**$88,000**	**Not a member**
$50.29 per resident (148th of 351)	$50.29 per resident (171st of 351)	$50.29 per resident (175th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2026. Every one names Gill directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$40,000	"the purposes of the operation of the Riverside Theatre Works and $10,000 for the Menino Arts Center"	Enacted names the town
FY2017	$38,000 (split two ways)	"the purposes of the operation of the Riverside Theatre Works of Boston"	Enacted names the town
FY2026	$10,000	"the purposes of the operation of the programs of Riverside Theatre Works"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Gill received 47% of its proportional share of competitive grant awards.

Local road miles **34.5** 317th of 351 · 19.8 per 1,000 residents (59th of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $638,000 · none in poor condition	Road-stream crossings **58** 234th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.8 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **1,740** residents plus seasonal	Core infrastructure index **0.82** roads, culverts, dams, coast, flood, energy

Burden index 0.47; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **261 acres** 3.0% of land area · FY2026	State-owned land PILOT, FY2026 **$29,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$113** statewide $117 · FY2026	New growth per resident **$10,876** FY2017–2025 · 308th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

The Division of Local Services shows no FY2025 general-fund spending for Gill; in FY2016 state aid covered 9.0% of it.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $228,000 of $2.5M · median town 14.1%	FY2016 **9.0%** $275,000 of $3.1M · median town 12.2%	FY2025 not reported aid $353,000; spending not reported · median town 11.5%	Net of state charges, FY2025 not reported FY2010: 8.7% · median town 10.0%

Gill's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $646,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Gill's state aid did not keep pace with either price measure: FY2025 aid was 0.1% below its FY2006 aid grown by Boston-area consumer prices and 11.2% below grown by the government price index.

Gross state aid went from $228,000 in FY2006 to $353,000 in FY2025, +55.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +53.0%	Years squeezed **4 of 8** fixed costs grew faster than allowed levy growth · one year not reported	Health insurance **5 of 8** years it grew faster than allowed levy growth · one year not reported

Flag: fixed costs changed by more than 30% in one year in FY2017 (+32%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Gill's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$78,000	not reported	28.2%
Placed in the town	$78,000	not reported	42.3%
Everything placed	$78,000	not reported	45.2%

SCHOOLS

Gill's required school contribution is 2.3% of median household income, 281st highest of 351.

Chapter 70 aid, FY2026 **$932,000** attributed to the town	Required local contribution **$1.3M** FY2026
Share of household income **2.3%** 281st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+21%** after inflation

Gill has no school district of its own. Its pupils attend Gill-Montague and Franklin County; Gill accounts for 12% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Gill received $502,000 in earmarks placed in the town and competitive grants over ten years, 19% of the $2.7 million its size, need and institutions predict.

PEERS

Gill ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Gill this town	**40**	**$9,063**	**$224**	**$50.29**	**0.47**	**2.3%**
Wales peer	59	$16,913	$776	$88.28	0.37	2.1%
Clarksburg peer	65	$21,258	$932	$15.00	3.56	2.1%
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
Warwick peer	52	$14,769	$2,887	$64.43	2.79	1.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Gloucester

City · Essex County · 30,075 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Essex · Andrew Tarr and Ann-Margaret Ferrante (until November 2025)

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Gloucester Public Schools, the city's own district
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Hamilton, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Gloucester scores 28 on the Fairness Index for all state aid and 72 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

323rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	28	36	20

Rank under other weightings: 291st to 341st.

Stable low: below 45 under every weighting

Gloucester received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

72 / 100

98th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	75	72	66

Rank under other weightings: 91st to 104th.

Stable high: above 55 under every weighting

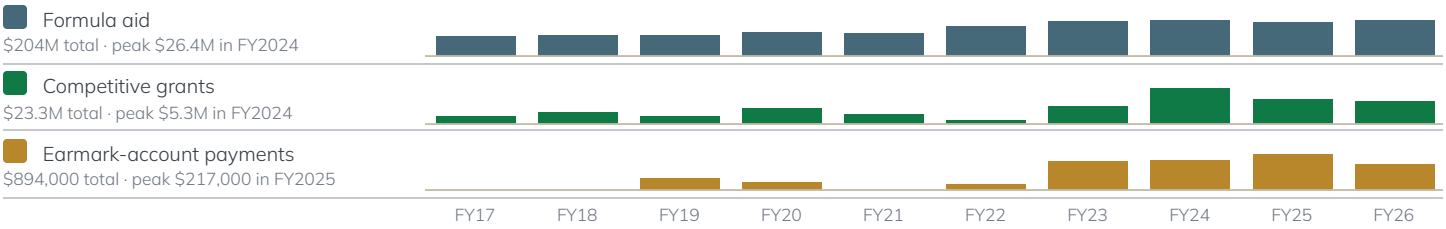
Gloucester received more than its share of discretionary money on all four measures; its blended score of 72 stays between 70 and 75 under every weighting tested.

STATE MONEY, FY2017–FY2026

Gloucester's town government and school districts received $204 million in formula aid and $23.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$204M	$23.3M	$894,000
$6,787 per resident (303rd of 351) · gross	$774 per resident (100th of 351)	$29.72 per resident (148th of 351)

Competitive grants to Gloucester peaked in FY2024 at $5.3 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $47.7 million, are not shown.

EARMARKS

Gloucester received $4.4 million in local earmarks naming the town, $4.1 million placed in the town and $4.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.4M	$4.1M	$4.4M	Not a member
$145 per resident (21st of 351)	$137 per resident (35th of 351)	$146 per resident (38th of 351)	35 municipalities had none

Placed in the town: 63 clauses in ten of ten budgets; the most recent in FY2026. $4.1 million came in clauses that name Gloucester; the other $20,000 went to organizations based in Gloucester, some of which serve a wider area.

Names the town includes $260,000 in clauses that name Gloucester but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $260,000 in four clauses for state facilities located in Gloucester (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"Gloucester Marine Genomics Institute Incorporated for the development and implementation of environmental DNA research and testing"	Enacted names the town
FY2025	$200,000	"the Gloucester Marine Genomics Institute, Inc. for a research project utilizing environmental DNA"	Enacted names the town
FY2024	$200,000	"Gloucester Marine Genomics Institute Incorporated for a research project to characterize the impact of offshore wind on economically important..."	Enacted names the town
FY2022	$197,000	"Gloucester Marine Genomics Institute and the division of marine fisheries to employ environmental DNA to perform fisheries research in support of the..."	Enacted names the town
FY2023	$195,000	"Gloucester Marine Genomics Institute, Inc. for the development of a rapid test for the detection of harmful algal blooms"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Gloucester received 2.12 times its proportional share of competitive grant awards.

Local road miles **88.1** 125th of 351 · 2.9 per 1,000 residents (319th of 351)	Town-owned bridges, replacement cost **$4.3M** scored exposure $1.1M · one in poor condition	Road-stream crossings **77** 176th of 351 · culverts and small crossings	Town-owned hazard dams **13** high or significant hazard
Land area **26.2 sq mi** 0% state-owned	Seasonal homes **7%** share of housing units	Peak service population **32,515** residents plus seasonal	Core infrastructure index **1.22** roads, culverts, dams, coast, flood, energy

Burden index 2.12; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **7 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$43,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$6,198** statewide $117 · FY2026	New growth per resident **$28,724** FY2017–2025 · 114th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.3% of Gloucester's general-fund spending in FY2025, down from 15.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.8%** $12.3M of $77.5M · median town 14.1%	FY2016 **11.7%** $12M of $103M · median town 12.2%	FY2025 **12.3%** $17.3M of $141M · median town 11.5%	Net of state charges, FY2025 **10.4%** FY2010: 10.2% · median town 10.0%

Gloucester's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $474,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Gloucester's state aid did not keep pace with either price measure: FY2025 aid was 9.0% below its FY2006 aid grown by Boston-area consumer prices and 19.1% below grown by the government price index.

Gross state aid went from $12.3 million in FY2006 to $17.3 million in FY2025, +41.2% in dollars. Flag: in FY2010, $1.6 million of Gloucester's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+47.0%** $11.8M to $17.3M · all towns +54.0%	All fixed costs, FY2016–25 **+60.9%** $19.6M to $31.6M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Gloucester's health insurance would have been $14.7 million in FY2025; it was $17.3 million, $2.61 million above the path. Its fixed costs would have been $24.5 million in FY2025; it was $31.6 million, $7.07 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Gloucester came to $3.8 million, 67.8% of the $5.55 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.8M	67.8%	28.2%
Placed in the town	$3.5M	63.5%	42.3%
Everything placed	$3.8M	68.2%	45.2%

SCHOOLS

Gloucester's required school contribution is 3.6% of median household income, 13th highest of 351.

Chapter 70 aid, FY2026 **$12.7M** to the town's district	Required local contribution **$41.1M** FY2026
Share of household income **3.6%** 13th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+49%** after inflation

Gloucester runs its own school district and also belongs to Essex North Shore; Gloucester accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Gloucester received $31.2 million in earmarks placed in the town and competitive grants over ten years, 22% more than the $25.5 million its size, need and institutions predict.

PEERS

Gloucester ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Gloucester this town	**28**	**$6,787**	**$774**	**$137**	**2.12**	**3.6%**
Falmouth peer	22	$5,383	$146	$66.46	0.76	2.9%
Yarmouth peer	27	$6,216	$356	$8.62	0.82	3.0%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Westport peer	30	$6,951	$107	$52.17	0.45	3.2%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Goshen

Town · Hampshire County · 915 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Hampshire · Lindsay N. Sabadosa

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Chesterfield-Goshen Regional School District, shared with Chesterfield
Hampshire Regional School District, shared with Chesterfield, Southampton, Westhampton and Williamsburg

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Goshen scores 58 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100

56th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	59	58	55

Rank under other weightings: 46th to 66th.

Stable high: above 55 under every weighting

Goshen received more than its share of state aid on all four measures; its blended score of 58 stays between 57 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100

24th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	95	93	94

Rank under other weightings: 18th to 30th.

Stable high: above 55 under every weighting

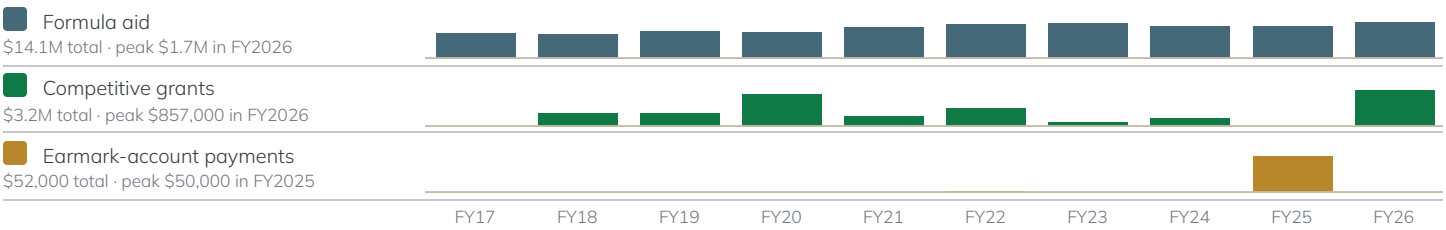
Goshen received more than its share of discretionary money on all four measures; its blended score of 94 stays between 94 and 95 under every weighting tested.

STATE MONEY, FY2017–FY2026

Goshen's town government and school districts received $14.1 million in formula aid and $3.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$14.1M	**$3.2M**	**$52,000**
$15,373 per resident (69th of 351) · gross	$3,510 per resident (28th of 351)	$56.70 per resident (64th of 351)

Competitive grants to Goshen peaked in FY2026 at $857,000, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 915 residents, a single payment moves Goshen's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $887,000, are not shown.

EARMARKS

Goshen received $75,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$75,000	**$75,000**	**$75,000**	**Not a member**
$81.97 per resident (70th of 351)	$81.97 per resident (98th of 351)	$81.97 per resident (104th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Goshen directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the town of Goshen for the Re-Imagine Goshen Center Project to transform underutilized areas downtown in the town of Goshen into integrated public..."	Enacted names the town
FY2023	$25,000 (split two ways)	"trail linkages and trail projects, including design and construction of infrastructure, for the development of the Highlands footpath between the..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Goshen received 1.88 times its proportional share of competitive grant awards.

Local road miles **24.9** 330th of 351 · 27.2 per 1,000 residents (46th of 351)	Town-owned bridges, replacement cost **$2.5M** scored exposure $894,000 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **17.3 sq mi** 18% state-owned	Seasonal homes **28%** share of housing units	Peak service population **1,301** residents plus seasonal	Core infrastructure index **7.76** roads, culverts, dams, coast, flood, energy

Burden index 1.88; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,005 acres** 18.1% of land area · FY2026	State-owned land PILOT, FY2026 **$57,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$28.67** statewide $117 · FY2026	New growth per resident **$19,698** FY2017–2025 · 191st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.3% of Goshen's general-fund spending in FY2025, down from 8.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.5%** $159,000 of $1.9M · median town 14.1%	FY2016 **8.7%** $216,000 of $2.5M · median town 12.2%	FY2025 **8.3%** $289,000 of $3.5M · median town 11.5%	Net of state charges, FY2025 **8.2%** FY2010: 9.6% · median town 10.0%

Goshen's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $638,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Goshen's state aid kept pace with both price measures: FY2025 aid was 16.9% above its FY2006 aid grown by Boston-area consumer prices and 3.9% above grown by the government price index.

Gross state aid went from $159,000 in FY2006 to $289,000 in FY2025, +81.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–33.8%** $22,000 to $15,000 · all towns +54.0%	All fixed costs, FY2016–25 **+30.9%** $139,000 to $182,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Goshen's health insurance would have been $28,000 in FY2025; it was $15,000, $13,000 below the path. Its fixed costs would have been $174,000 in FY2025; it was $182,000, $8,437 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+57%); health insurance changed by more than 30% in one year in FY2020 (–45%), FY2021 (+71%) and FY2023 (–48%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Goshen's reported health insurance fell from $22,000 in FY2016 to $15,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$75,000	no increase	28.2%
Placed in the town	$75,000	no increase	42.3%
Everything placed	$75,000	no increase	45.2%

SCHOOLS

Goshen's required school contribution is 2.3% of

EXPECTED AND ACTUAL

Goshen received $3.3 million in earmarks placed in the town and competitive grants over ten years, 91%

median household income, 273rd highest of 351.

Chapter 70 aid, FY2026 **$773,000** attributed to the town	Required local contribution **$932,000** FY2026
Share of household income **2.3%** 273rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−1%** after inflation

Goshen has no school district of its own. Its pupils attend Goshen, Chesterfield-Goshen and Hampshire; Goshen accounts for 100%, 45% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $3.6 million its size, need and institutions predict.

PEERS

Goshen ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Goshen this town	**58**	**$15,373**	**$3,510**	**$81.97**	**1.88**	**2.3%**
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Petersham peer · lowest in class of 30	56	$19,509	$612	$0	0.99	2.7%
Ashfield peer	45	$10,211	$1,970	$48.86	1.85	2.4%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Gosnold

Town · Dukes County · 31 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
Barnstable-Dukes-Nantucket · Thomas W. Moakley	**Cape and Islands** · Julian Cyr	**Gosnold Public Schools**, the town's own district	Martha's Vineyard Commission

FAIRNESS INDEX

Gosnold scores 82 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

82 / 100

1st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
85	86	73	84

Rank under other weightings: 1st to 2nd.

Stable high: above 55 under every weighting

Gosnold received more than its share of state aid on all four measures; its blended score of 82 stays between 80 and 84 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

14th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
100	100	84	100

Rank under other weightings: 4th to 25th.

Stable high: above 55 under every weighting

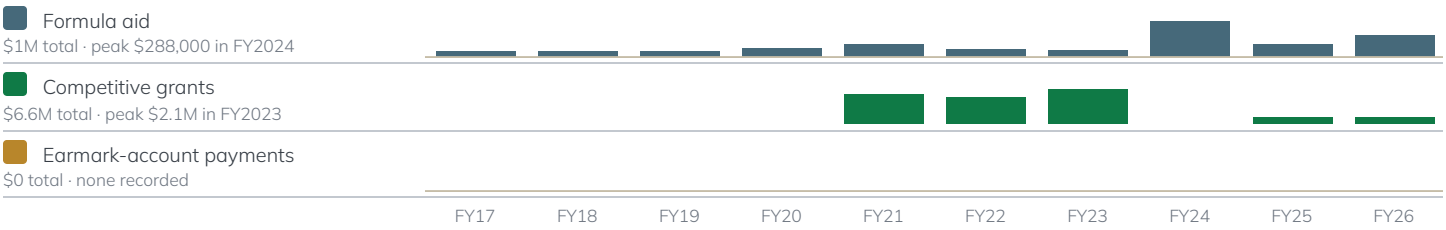
Gosnold received more than its share of discretionary money on all four measures; its blended score of 96 stays between 94 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Gosnold's town government and school districts received $1 million in formula aid and $6.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1M	**$6.6M**	**$0**
$32,727 per resident (3rd of 351) · gross	$214,090 per resident (1st of 351)	$0 per resident (339th of 351)

Competitive grants to Gosnold peaked in FY2023 at $2.1 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 31 residents, a single payment moves Gosnold's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.3 million, are not shown.

EARMARKS

No local earmark was placed in Gosnold in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Gosnold's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Mount Washington	$0	$0	$0	$0
Alford	$0	$0	$0	$0
Tyringham	$0	$0	$0	$0
Aquinnah	$100,000	$100,000	$100,000	$150
Monterey	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Gosnold received 76% of its proportional share of competitive grant awards.

Local road miles **2.0** 351st of 351 · 64.5 per 1,000 residents (12th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.2 sq mi** 1% state-owned	Seasonal homes **86%** share of housing units	Peak service population **265** residents plus seasonal	Core infrastructure index **0.73** roads, culverts, dams, coast, flood, energy

Burden index 0.76; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **68 acres** 0.8% of land area · FY2026	State-owned land PILOT, FY2026 **$34,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$502** statewide $117 · FY2026	New growth per resident **$392,988** FY2017–2025 · 1st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

The Division of Local Services shows no FY2025 general-fund spending for Gosnold; in FY2016 state aid covered 3.2% of it.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **1.8%** $24,000 of $1.3M · median town 14.1%	FY2016 **3.2%** $43,000 of $1.3M · median town 12.2%	FY2025 not reported aid $41,000; spending not reported · median town 11.5%	Net of state charges, FY2025 not reported FY2010: 2.5% · median town 10.0%

Gosnold's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 8.3% above its FY2006 aid grown by Boston-area consumer prices and 3.8% below grown by the government price index.

Gross state aid went from $24,000 in FY2006 to $41,000 in FY2025, +67.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +53.0%	Years squeezed **4 of 6** fixed costs grew faster than allowed levy growth · three years not reported	Health insurance **3 of 6** years it grew faster than allowed levy growth · three years not reported

Flag: health insurance changed by more than 30% in one year in FY2019 (+33%) and FY2024 (+56%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Gosnold's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	not reported	28.2%
Placed in the town	$0	not reported	42.3%
Everything placed	$0	not reported	45.2%

SCHOOLS

Gosnold had no resident pupils in DESE's FY2026 Chapter 70 enrollment.

Chapter 70 aid, FY2026 not available attributed to the town	Required local contribution $0 FY2026
Share of household income not available no Census median income	Real aid per pupil, FY2017–26 not available after inflation

DESE's FY2026 Chapter 70 files assign Gosnold no foundation enrollment or district share. DESE counts no resident pupils for Gosnold in FY2026.

EXPECTED AND ACTUAL

Gosnold received $6.6 million in earmarks placed in the town and competitive grants over ten years, 2.7 times the $2.5 million its size, need and institutions predict.

PEERS

Gosnold is one of eight municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Gosnold this town	**82**	**$32,727**	**$214,090**	**$0**	**0.76**	**not available**
Mount Washington peer · lowest in class of 30	62	$22,393	$6,365	$0	1.07	0.4%
Alford peer	43	$5,565	$1,817	$0	0.13	0.9%
Tyringham peer	34	$4,388	$85.59	$0	0.28	1.0%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Grafton

Town · Worcester County · 19,902 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Worcester · David K. Muradian, Jr.

STATE SENATE

Second Worcester · Michael O. Moore

SCHOOL DISTRICTS

Grafton Public Schools, the town's own district

Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Hopedale, Mendon, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Grafton scores 36 on the Fairness Index for all state aid and 58 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

249th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	41	33	34

Rank under other weightings: 234th to 265th.

Stable low: below 45 under every weighting

Grafton received less than its share of state aid on all four measures; its blended score of 36 stays between 35 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

58 / 100

148th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	60	63	52

Rank under other weightings: 142nd to 160th.

Stable high: above 55 under every weighting

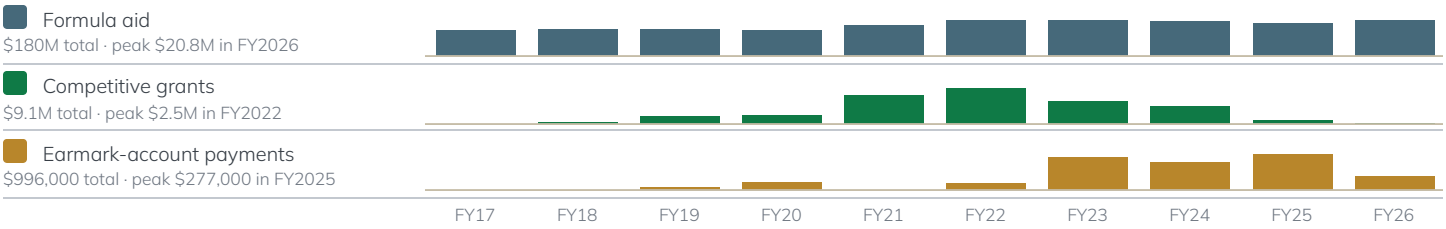
Grafton received more than its share of discretionary money on all four measures; its blended score of 58 stays between 56 and 60 under every weighting tested.

STATE MONEY, FY2017–FY2026

Grafton's town government and school districts received $180 million in formula aid and $9.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$180M	**$9.1M**	**$996,000**
$9,020 per resident (221st of 351) · gross	$459 per resident (149th of 351)	$50.07 per resident (77th of 351)

Competitive grants to Grafton peaked in FY2022 at $2.5 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.3 million, are not shown.

EARMARKS

Grafton received $725,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$725,000	**$725,000**	**$725,000**	**Not a member**
$36.42 per resident (203rd of 351)	$36.42 per resident (217th of 351)	$36.42 per resident (220th of 351)	35 municipalities had none

Placed in the town: 20 clauses in ten of ten budgets; the most recent in FY2026. Every one names Grafton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$70,000	"the town of Grafton for the removal of invasive plants"	Enacted names the town
FY2019	$57,000	"additional warning sirens at the Grafton and Upton railroad propane facility in the town of Grafton"	Enacted names the town
FY2025	$50,000	"the town of Grafton for the removal of invasive plants"	Enacted names the town
FY2023	$50,000	"municipal center upgrades in the town of Grafton"	Enacted names the town
FY2018	$50,000	"public safety improvements in Grafton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Grafton received 1.97 times its proportional share of competitive grant awards.

Local road miles **85.7** 134th of 351 · 4.3 per 1,000 residents (269th of 351)	Town-owned bridges, replacement cost **$16.2M** scored exposure $5.8M · two in poor condition	Road-stream crossings **183** 17th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **22.8 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **19,923** residents plus seasonal	Core infrastructure index **0.71** roads, culverts, dams, coast, flood, energy

Burden index 1.97; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **88 acres** 0.6% of land area · FY2026	State-owned land PILOT, FY2026 **$8,771** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$99.38** statewide $117 · FY2026	New growth per resident **$23,727** FY2017–2025 · 147th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 20.0% of Grafton's general-fund spending in FY2025, down from 25.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **25.2%** $8.3M of $33M · median town 14.1%	FY2016 **23.5%** $12.5M of $53.1M · median town 12.2%	FY2025 **20.0%** $16.2M of $80.8M · median town 11.5%	Net of state charges, FY2025 **19.0%** FY2010: 23.3% · median town 10.0%

Grafton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $635,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Grafton's state aid kept pace with both price measures: FY2025 aid was 25.4% above its FY2006 aid grown by Boston-area consumer prices and 11.5% above grown by the government price index.

Gross state aid went from $8.3 million in FY2006 to $16.2 million in FY2025, +94.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+56.7%** $3.7M to $5.8M · all towns +54.0%	All fixed costs, FY2016–25 **+74.9%** $5.9M to $10.4M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Grafton's health insurance would have been $4.60 million in FY2025; it was $5.77 million, $1.17 million above the path. Its fixed costs would have been $7.42 million in FY2025; it was $10.4 million, $2.97 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Grafton came to $615,000, 29.5% of the $2.09 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$615,000	29.5%	28.2%
Placed in the town	$615,000	29.5%	42.3%
Everything placed	$615,000	29.5%	45.2%

SCHOOLS

Grafton's required school contribution is 2.9% of median household income, 110th highest of 351.

Chapter 70 aid, FY2026 **$14.1M** to the town's district	Required local contribution **$28.9M** FY2026
Share of household income **2.9%** 110th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–1%** after inflation

Grafton runs its own school district and also belongs to Blackstone Valley; Grafton accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Grafton received $10.3 million in earmarks placed in the town and competitive grants over ten years, 48% more than the $7 million its size, need and institutions predict.

PEERS

Grafton ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Grafton this town	**36**	**$9,020**	**$459**	**$36.42**	**1.97**	**2.9%**
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Granby

Town · Hampshire County · 6,080 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Hampshire · Mindy Domb 53% of residents
2nd Hampshire · Homar Gómez 47% of residents

Granby is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS

Granby Public Schools, the town's own district
Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Hardwick, Monson, New Braintree, Oakham, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Granby scores 49 on the Fairness Index for all state aid and 16 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

131st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	51	51	47

Rank under other weightings: 116th to 139th.

Near fair: between 45 and 55 under every weighting

Granby received less than its share of state aid on two of four measures; its blended score of 49 stays between 48 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

16 / 100

331st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
15	16	18	14

Rank under other weightings: 325th to 333rd.

Stable low: below 45 under every weighting

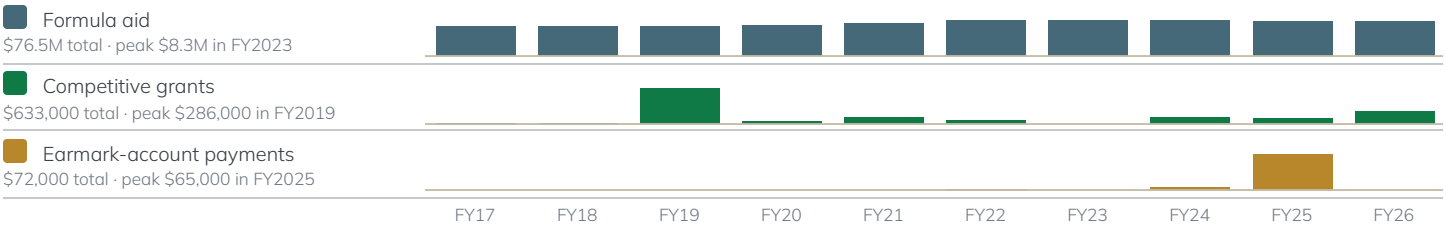
Granby received less than its share of discretionary money on all four measures; its blended score of 16 stays between 15 and 17 under every weighting tested.

STATE MONEY, FY2017–FY2026

Granby's town government and school districts received $76.5 million in formula aid and $633,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$76.5M	**$633,000**	**$72,000**
$12,582 per resident (122nd of 351) · gross	$104 per resident (321st of 351)	$11.92 per resident (247th of 351)

Competitive grants to Granby peaked in FY2019 at $286,000, 45% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

Granby received $160,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$160,000	**$160,000**	**$160,000**	**Not a member**
$26.32 per resident (246th of 351)	$26.32 per resident (257th of 351)	$26.32 per resident (258th of 351)	35 municipalities had none

Placed in the town: eight clauses in four of ten budgets; the most recent in FY2026. Every one names Granby directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"purchase portable communication radios for the Granby fire department"	Enacted names the town
FY2017	$35,000	"Friends of Granby Veterans, Inc. to cover the costs associated with the construction and maintenance of a veterans memorial in the town of Granby"	Enacted names the town
FY2026	$25,000	"Granby To-Go, Inc. to support the in-school food pantry and clothing distribution program in the town of Granby"	Enacted names the town
FY2026	$10,000	"the Granby Legion Post 266 to support the renovation of its community kitchen"	Enacted names the town
FY2026	$10,000	"the Granby senior center food pantry to support the purchase of food resources for individuals and families in the town of Granby"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Granby received 31% of its proportional share of competitive grant awards.

Local road miles **58.0** 220th of 351 · 9.5 per 1,000 residents (113th of 351)	Town-owned bridges, replacement cost **$10.7M** scored exposure $4.4M · none in poor condition	Road-stream crossings **84** 157th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **27.8 sq mi** 14% state-owned	Seasonal homes **2%** share of housing units	Peak service population **6,226** residents plus seasonal	Core infrastructure index **0.76** roads, culverts, dams, coast, flood, energy

Burden index 0.31; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,234 acres** 12.6% of land area · FY2026	State-owned land PILOT, FY2026 **$118,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$52.95** statewide $117 · FY2026	New growth per resident **$15,836** FY2017–2025 · 242nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 30.0% of Granby's general-fund spending in FY2025, down from 38.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **38.4%** $5M of $13M · median town 14.1%	FY2016 **38.0%** $6.3M of $16.6M · median town 12.2%	FY2025 **30.0%** $7M of $23.3M · median town 11.5%	Net of state charges, FY2025 **23.9%** FY2010: 38.0% · median town 10.0%

Granby's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $160,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Granby's state aid did not keep pace with either price measure: FY2025 aid was 10.1% below its FY2006 aid grown by Boston-area consumer prices and 20.1% below grown by the government price index.

Gross state aid went from $5 million in FY2006 to $7 million in FY2025, +39.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.2%** $1.3M to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+51.3%** $2.4M to $3.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Granby's health insurance would have been $1.60 million in FY2025; it was $1.72 million, $120,000 above the path. Its fixed costs would have been $3.03 million in FY2025; it was $3.67 million, $639,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Granby came to $115,000, 26.3% of the $438,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$115,000	26.3%	28.2%
Placed in the town	$115,000	26.3%	42.3%
Everything placed	$115,000	26.3%	45.2%

SCHOOLS

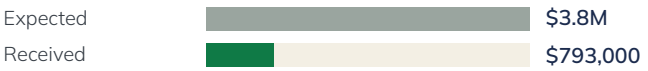
Granby's required school contribution is 2.4% of median household income, 259th highest of 351.

Chapter 70 aid, FY2026 **$5.1M** to the town's district	Required local contribution **$6.7M** FY2026
Share of household income **2.4%** 259th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Granby runs its own school district and also belongs to Pathfinder; Granby accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

Granby received $793,000 in earmarks placed in the town and competitive grants over ten years, 21% of the $3.8 million its size, need and institutions predict.



PEERS

Granby ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Granby this town	**49**	**$12,582**	**$104**	**$26.32**	**0.31**	**2.4%**
Hampden peer	31	$7,912	$119	$42.46	1.10	3.0%
Leicester peer	55	$13,695	$728	$56.82	1.36	2.8%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Conway lowest in class of 30	48	$12,799	$405	$0	0.68	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Granville

Town · Hampden County · 1,846 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark	Southwick-Tolland-Granville Regional School District, shared with Southwick and Tolland	Pioneer Valley Planning Commission

FAIRNESS INDEX

Granville scores 50 on the Fairness Index for all state aid and 90 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

125th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	42	50	56

Rank under other weightings: 102nd to 150th.

Near fair: between 45 and 55 under every weighting

Granville received more than its share of state aid on three of four measures; its blended score of 50 stays between 48 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

90 / 100

43rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
93	90	85	94

Rank under other weightings: 39th to 44th.

Stable high: above 55 under every weighting

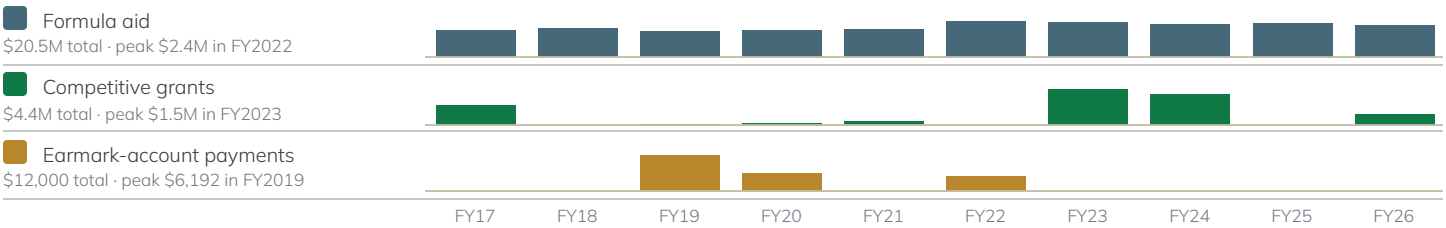
Granville received more than its share of discretionary money on all four measures; its blended score of 90 stays between 89 and 92 under every weighting tested.

STATE MONEY, FY2017–FY2026

Granville's town government and school districts received $20.5 million in formula aid and $4.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$20.5M	$4.4M	$12,000
$11,112 per resident (144th of 351) · gross	$2,359 per resident (40th of 351)	$6.36 per resident (278th of 351)

Competitive grants to Granville peaked in FY2023 at $1.5 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $886,000, are not shown.

EARMARKS

No local earmark was placed in Granville in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $12,000 in payments to Granville's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Granville.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Granville's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Buckland	$112,000	$112,000	$112,000	$55.26
Hardwick	$270,000	$270,000	$270,000	$101
Colrain	$50,000	$50,000	$50,000	$30.73
Huntington	$75,000	$75,000	$75,000	$33.78
Charlemont	$165,000	$165,000	$165,000	$148

WHAT THE TOWN CARRIES

Measured against what it maintains, Granville received 73% of its proportional share of competitive grant awards.

Local road miles **64.3** 203rd of 351 · 34.8 per 1,000 residents (37th of 351)	Town-owned bridges, replacement cost **$10.7M** scored exposure $5.4M · nine in poor condition	Road-stream crossings **89** 142nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **42.3 sq mi** 6% state-owned	Seasonal homes **2%** share of housing units	Peak service population **1,893** residents plus seasonal	Core infrastructure index **0.03** roads, culverts, dams, coast, flood, energy

Burden index 0.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,707 acres** 6.3% of land area · FY2026	State-owned land PILOT, FY2026 **$87,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$51.26** statewide $117 · FY2026	New growth per resident **$14,921** FY2017–2025 · 255th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

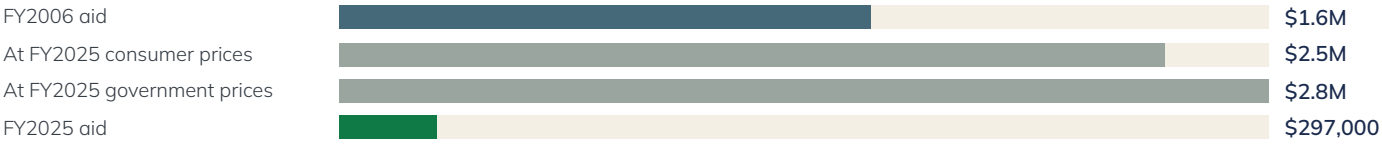
State aid covered 4.9% of Granville's general-fund spending in FY2025, down from 36.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.1%** $1.6M of $4.5M · median town 14.1%	FY2016 **6.3%** $222,000 of $3.5M · median town 12.2%	FY2025 **4.9%** $297,000 of $6M · median town 11.5%	Net of state charges, FY2025 **4.9%** FY2010: 32.0% · median town 10.0%

Granville's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Granville's state aid did not keep pace with either price measure: FY2025 aid was 88.2% below its FY2006 aid grown by Boston-area consumer prices and 89.5% below grown by the government price index.



Gross state aid went from $1.6 million in FY2006 to $297,000 in FY2025, –81.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+159.9%** $35,000 to $92,000 · all towns +54.0%	All fixed costs, FY2016–25 **+95.4%** $208,000 to $407,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Granville's health insurance would have been $44,000 in FY2025; it was $92,000, $48,000 above the path. Its fixed costs would have been $260,000 in FY2025; it was $407,000, $147,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (+38%); health insurance changed by more than 30% in one year in FY2021 (+30%) and FY2024 (+91%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Granville came to $0, 0.0% of the $56,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Granville's required school contribution is 2.8% of median household income, 113th highest of 351.

Chapter 70 aid, FY2026 **$1.3M** attributed to the town	Required local contribution **$1.8M** FY2026
Share of household income **2.8%** 113th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+9%** after inflation

Granville has no school district of its own. Its pupils attend Granville and Southwick Tolland Granville; Granville accounts for 100% and 12% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Granville received $4.4 million in earmarks placed in the town and competitive grants over ten years, 14% more than the $3.8 million its size, need and institutions predict.

PEERS

Granville is the only municipality, among itself and its ten nearest peers, with no earmarks placed in it in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Granville this town	**50**	**$11,112**	**$2,359**	**$0**	**0.73**	**2.8%**
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
Huntington peer	63	$18,322	$2,918	$33.78	0.25	2.5%
Charlemont peer	64	$19,209	$6,110	$148	2.68	3.8%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%
Savoy lowest in class of 30	57	$18,956	$1,027	$0	1.10	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Great Barrington

Town · Berkshire County · 7,202 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Berkshire Hills Regional School District, shared with Stockbridge and West Stockbridge

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Great Barrington scores 42 on the Fairness Index for all state aid and 91 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100
190th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	44	49	31

Rank under other weightings: 159th to 226th.

Weighting-dependent: the range crosses the 45–55 band

Great Barrington received less than its share of state aid on all four measures; its blended score of 42 stays between 39 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

91 / 100
40th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
93	92	90	88

Rank under other weightings: 35th to 44th.

Stable high: above 55 under every weighting

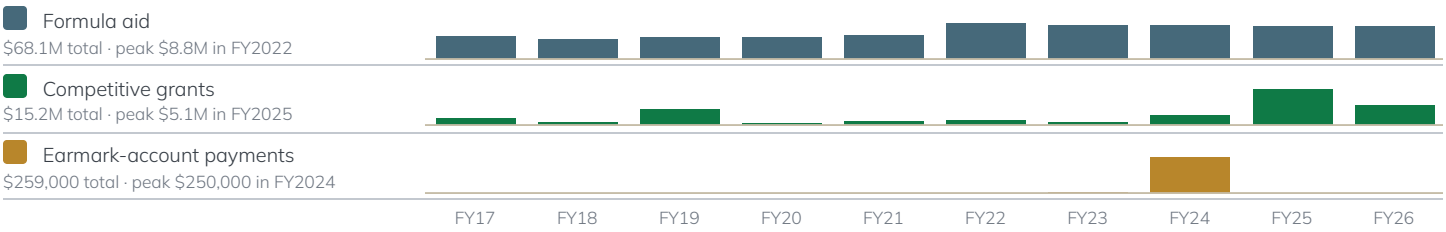
Great Barrington received more than its share of discretionary money on all four measures; its blended score of 91 stays between 90 and 92 under every weighting tested.

STATE MONEY, FY2017–FY2026

Great Barrington's town government and school districts received $68.1 million in formula aid and $15.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$68.1M	$15.2M	$259,000
$9,461 per resident (196th of 351) · gross	$2,113 per resident (42nd of 351)	$35.94 per resident (125th of 351)

Competitive grants to Great Barrington peaked in FY2025 at $5.1 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $26.3 million, are not shown.

EARMARKS

Great Barrington received $782,000 in local earmarks naming the town, $1.3 million placed in the town and $1.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$782,000	$1.3M	$1.3M	Not a member
$109 per resident (37th of 351)	$175 per resident (15th of 351)	$175 per resident (24th of 351)	35 municipalities had none

Placed in the town: 24 clauses in eight of ten budgets; the most recent in FY2026. $782,000 came in clauses that name Great Barrington; the other $480,000 went to organizations based in Great Barrington, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$200,000	"Railroad Street Youth Project in Great Barrington for the Berkshire County Youth Development Project for youth intervention services"	Enacted names the town
FY2025	$75,000	"the Southern Berkshire Volunteer Ambulance Squad, Inc. to provide out of hospital advanced life support care to communities in western Massachusetts"	Enacted recipient based here
FY2024	$75,000	"Community Access to the Arts, Inc. in the town of Great Barrington"	Enacted names the town
FY2023	$75,000	"Community Access to the Arts, Inc. in the town of Great Barrington"	Enacted names the town
FY2025	$60,000	"Nonprofit Center of the Berkshires, Inc. for the purpose of providing additional resources, support and training to over 1,000 Berkshire nonprofits..."	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Great Barrington received 2.92 times its proportional share of competitive grant awards.

Local road miles **77.7** 166th of 351 · 10.8 per 1,000 residents (96th of 351)	Town-owned bridges, replacement cost **$29M** scored exposure $14.2M · two in poor condition	Road-stream crossings **103** 113th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **44.8 sq mi** 26% state-owned	Seasonal homes **8%** share of housing units	Peak service population **7,827** residents plus seasonal	Core infrastructure index **1.30** roads, culverts, dams, coast, flood, energy

Burden index 2.92; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **7,437 acres** 25.9% of land area · FY2026	State-owned land PILOT, FY2026 **$411,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$55.25** statewide $117 · FY2026	New growth per resident **$32,979** FY2017–2025 · 91st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.8% of Great Barrington's general-fund spending in FY2025, down from 5.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.2%** $865,000 of $16.6M · median town 14.1%	FY2016 **4.4%** $1M of $23.3M · median town 12.2%	FY2025 **3.8%** $1.4M of $37.6M · median town 11.5%	Net of state charges, FY2025 **3.6%** FY2010: 3.6% · median town 10.0%

Great Barrington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Great Barrington's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 6.8% above its FY2006 aid grown by Boston-area consumer prices and 5.1% below grown by the government price index.

Gross state aid went from $865,000 in FY2006 to $1.4 million in FY2025, +65.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+79.7%** $955,000 to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+62.8%** $2M to $3.3M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Great Barrington's health insurance would have been $1.19 million in FY2025; it was $1.72 million, $524,000 above the path. Its fixed costs would have been $2.51 million in FY2025; it was $3.28 million, $764,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+41%); health insurance changed by more than 30% in one year in FY2025 (+35%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Great Barrington came to $738,000, 96.9% of the $761,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$738,000	96.9%	28.2%
Placed in the town	$1.1M	138.9%	42.3%
Everything placed	$1.1M	138.9%	45.2%

SCHOOLS

Great Barrington's required school contribution is 3.7% of median household income, 9th highest of 351.

Chapter 70 aid, FY2026 **$2.7M** attributed to the town	Required local contribution **$9.2M** FY2026
Share of household income **3.7%** 9th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Great Barrington has no school district of its own. Its pupils attend Berkshire Hills; Great Barrington accounts for 75% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Great Barrington received $17.4 million in earmarks placed in the town and competitive grants over ten years, 60% more than the $10.9 million its size, need and institutions predict.

PEERS

Great Barrington ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Great Barrington this town	**42**	**$9,461**	**$2,113**	**$175**	**2.92**	**3.7%**
Lee peer	38	$7,783	$1,292	$21.86	2.91	3.1%
Chatham peer · best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Greenfield

City · Franklin County · 17,664 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps
56% of residents

1st Franklin · Natalie M. Blais 44% of residents

Greenfield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Greenfield Public Schools, the city's own district

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Heath and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Greenfield scores 53 on the Fairness Index for all state aid and 88 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

99th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	45	63	47

Rank under other weightings: 59th to 139th.

Weighting-dependent: the range crosses the 45–55 band

Greenfield received less than its share of state aid on two of four measures; its blended score of 53 stays between 49 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

88 / 100

46th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
90	85	90	86

Rank under other weightings: 44th to 55th.

Stable high: above 55 under every weighting

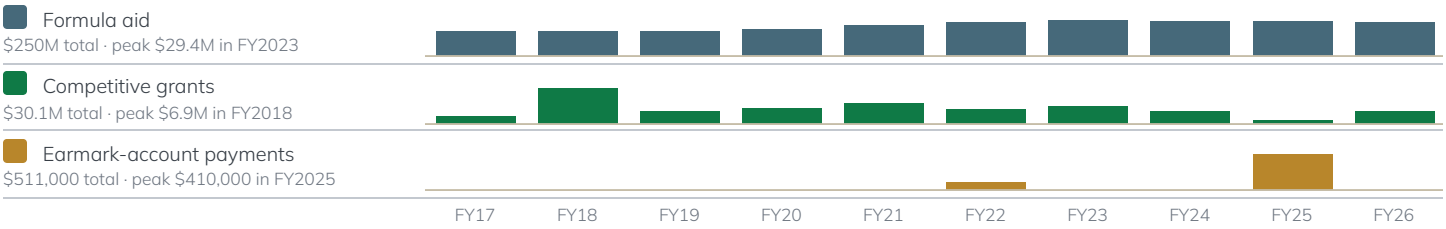
Greenfield received more than its share of discretionary money on all four measures; its blended score of 88 stays between 86 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Greenfield's town government and school districts received $250 million in formula aid and $30.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$250M	**$30.1M**	**$511,000**
$14,180 per resident (90th of 351) · gross	$1,705 per resident (53rd of 351)	$28.94 per resident (151st of 351)

Competitive grants to Greenfield peaked in FY2018 at $6.9 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.9 million, are not shown.

EARMARKS

Greenfield received $1.1 million in local earmarks naming the town, $2.4 million placed in the town and $4.6 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$2.4M**	**$4.6M**	**Not a member**
$62.39 per resident (109th of 351)	$134 per resident (37th of 351)	$258 per resident (11th of 351)	35 municipalities had none

Placed in the town: 23 clauses in nine of ten budgets; the most recent in FY2026. $1.1 million came in clauses that name Greenfield; the other $1.3 million went to organizations based in Greenfield, some of which serve a wider area.

Everything placed, the third measure, adds $2.2 million in ten clauses for state facilities located in Greenfield (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$300,000	"the Franklin county opioid education and awareness task force"	Enacted recipient based here
FY2026	$250,000	"the Baystate Franklin Medical Center in the city of Greenfield to support its family medicine residency program"	Enacted names the town
FY2025	$250,000	"the community health center in Greenfield to support its family medicine residency program"	Enacted names the town
FY2017	$200,000	"the Franklin County Opioid Education and Awareness Task Force"	Enacted recipient based here
FY2026	$150,000	"the Opioid Task Force of Franklin County and the North Quabbin Region"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Greenfield received 4.81 times its proportional share of competitive grant awards.

Local road miles **102.5** 90th of 351 · 5.8 per 1,000 residents (201st of 351)	Town-owned bridges, replacement cost **$22.4M** scored exposure $5.8M · none in poor condition	Road-stream crossings **96** 126th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **21.4 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,699** residents plus seasonal	Core infrastructure index **1.08** roads, culverts, dams, coast, flood, energy

Burden index 4.81; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **133 acres** 1.0% of land area · FY2026	State-owned land PILOT, FY2026 **$50,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$373** statewide $117 · FY2026	New growth per resident **$10,355** FY2017–2025 · 316th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 30.1% of Greenfield's general-fund spending in FY2025, down from 36.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.2%** $14.4M of $39.7M · median town 14.1%	FY2016 **32.8%** $17.1M of $52M · median town 12.2%	FY2025 **30.1%** $21.6M of $71.7M · median town 11.5%	Net of state charges, FY2025 **22.4%** FY2010: 27.3% · median town 10.0%

Greenfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Greenfield's state aid did not keep pace with either price measure: FY2025 aid was 3.2% below its FY2006 aid grown by Boston-area consumer prices and 14.0% below grown by the government price index.

Gross state aid went from $14.4 million in FY2006 to $21.6 million in FY2025, +50.1% in dollars. Flag: in FY2010, $2 million of Greenfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.5%** $6.4M to $8.9M · all towns +54.0%	All fixed costs, FY2016–25 **+57.4%** $10.8M to $17M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Greenfield's health insurance would have been $7.96 million in FY2025; it was $8.89 million, $934,000 above the path. Its fixed costs would have been $13.5 million in FY2025; it was $17 million, $3.51 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Greenfield came to $777,000, 30.8% of the $2.52 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$777,000	30.8%	28.2%
Placed in the town	$1.7M	66.8%	42.3%
Everything placed	$3.7M	147.9%	45.2%

SCHOOLS

Greenfield's required school contribution is 2.9% of median household income, 97th highest of 351.

Chapter 70 aid, FY2026 **$18.5M** to the town's district	Required local contribution **$13.3M** FY2026
Share of household income **2.9%** 97th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Greenfield runs its own school district and also belongs to Franklin County; Greenfield accounts for 23% of that district's foundation budget.

EXPECTED AND ACTUAL

Greenfield received $34.9 million in earmarks placed in the town and competitive grants over ten years, 44% more than the $24.2 million its size, need and institutions predict.

PEERS

Greenfield ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Greenfield this town	**53**	**$14,180**	**$1,705**	**$134**	**4.81**	**2.9%**
Southbridge peer	68	$21,891	$992	$33.72	1.54	2.3%
Gardner peer	60	$17,461	$784	$85.79	2.19	2.3%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
Webster peer	55	$14,621	$927	$27.75	0.46	2.8%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Groton

Town · Middlesex County · 11,390 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale 64% of residents

37th Middlesex · Danillo A. Sena 36% of residents

Groton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

Groton-Dunstable Regional School District, shared with Dunstable

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Littleton, Pepperell, Shirley, Townsend and Westford

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Groton scores 49 on the Fairness Index for all state aid and 51 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

133rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	63	42	43

Rank under other weightings: 107th to 155th.

Near fair: between 45 and 55 under every weighting

Groton received less than its share of state aid on three of four measures; its blended score of 49 stays between 45 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

51 / 100

181st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	64	48	44

Rank under other weightings: 166th to 191st.

Near fair: between 45 and 55 under every weighting

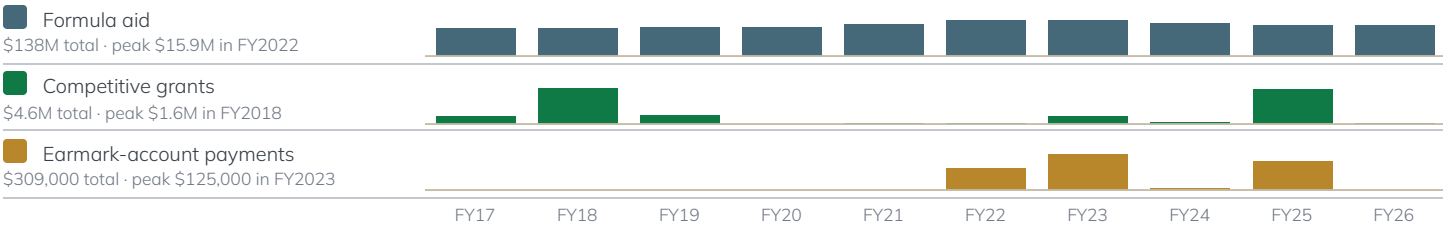
Groton received less than its share of discretionary money on three of four measures; its blended score of 51 stays between 48 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Groton's town government and school districts received $138 million in formula aid and $4.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$138M	$4.6M	$309,000
$12,079 per resident (127th of 351) · gross	$400 per resident (170th of 351)	$27.11 per resident (161st of 351)

Competitive grants to Groton peaked in FY2018 at $1.6 million, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.8 million, are not shown.

EARMARKS

Groton received $132,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$132,000	$132,000	$132,000	Not a member
$11.62 per resident (297th of 351)	$11.62 per resident (305th of 351)	$11.62 per resident (306th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Groton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$92,000	"the Groton senior center for the procurement of an emergency generator"	Enacted names the town
FY2025	$25,000	"Groton to add sidewalks on West Main street and route 40"	Enacted names the town
FY2024	$15,000	"the town of Groton for Destination Groton to procure trail signage"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Groton received 1.19 times its proportional share of competitive grant awards.

Local road miles **104.2** 81st of 351 · 9.1 per 1,000 residents (119th of 351)	Town-owned bridges, replacement cost **$2.4M** scored exposure $495,000 · one in poor condition	Road-stream crossings **89** 142nd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **32.8 sq mi** 5% state-owned	Seasonal homes **0%** share of housing units	Peak service population **11,413** residents plus seasonal	Core infrastructure index **0.53** roads, culverts, dams, coast, flood, energy

Burden index 1.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **840 acres** 4.0% of land area · FY2026	State-owned land PILOT, FY2026 **$138,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$164** statewide $117 · FY2026	New growth per resident **$19,943** FY2017–2025 · 184th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.2% of Groton's general-fund spending in FY2025, down from 3.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.6%** $908,000 of $25.5M · median town 14.1%	FY2016 **2.6%** $857,000 of $33.5M · median town 12.2%	FY2025 **2.2%** $1.2M of $51.6M · median town 11.5%	Net of state charges, FY2025 **2.0%** FY2010: 2.6% · median town 10.0%

Groton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Groton's state aid did not keep pace with either price measure: FY2025 aid was 18.2% below its FY2006 aid grown by Boston-area consumer prices and 27.3% below grown by the government price index.

Gross state aid went from $908,000 in FY2006 to $1.2 million in FY2025, +26.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+47.0%** $1.3M to $1.9M · all towns +54.0%	All fixed costs, FY2016–25 **+42.2%** $3.6M to $5.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Groton's health insurance would have been $1.59 million in FY2025; it was $1.88 million, $283,000 above the path. Its fixed costs would have been $4.44 million in FY2025; it was $5.06 million, $616,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Groton came to $132,000, 22.1% of the $600,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$132,000	22.1%	28.2%
Placed in the town	$132,000	22.1%	42.3%
Everything placed	$132,000	22.1%	45.2%

SCHOOLS

Groton's required school contribution is 2.6% of median household income, 186th highest of 351.

Chapter 70 aid, FY2026 **$8.9M** attributed to the town	Required local contribution **$18.7M** FY2026
Share of household income **2.6%** 186th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–15%** after inflation

Groton has no school district of its own. Its pupils attend Groton-Dunstable and Nashoba Valley; Groton accounts for 76% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Groton received $4.8 million in earmarks placed in the town and competitive grants over ten years, 29% more than the $3.7 million its size, need and institutions predict.

PEERS

Groton ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Groton this town	**49**	**$12,079**	**$400**	**$11.62**	**1.19**	**2.6%**
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Hanover peer	38	$9,140	$220	$18.83	0.60	2.8%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Groveland

Town · Essex County · 6,777 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
14th Essex · Adrianne Pusateri Ramos

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Pentucket Regional School District, shared with Merrimac and West Newbury
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Haverhill, Ipswich, Merrimac, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY
Merrimack Valley Planning Commission

FAIRNESS INDEX

Groveland scores 52 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

110th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	62	48	45

Rank under other weightings: 87th to 125th.

Near fair: between 45 and 55 under every weighting

Groveland received less than its share of state aid on two of four measures; its blended score of 52 stays between 49 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100

144th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	68	61	52

Rank under other weightings: 134th to 153rd.

Stable high: above 55 under every weighting

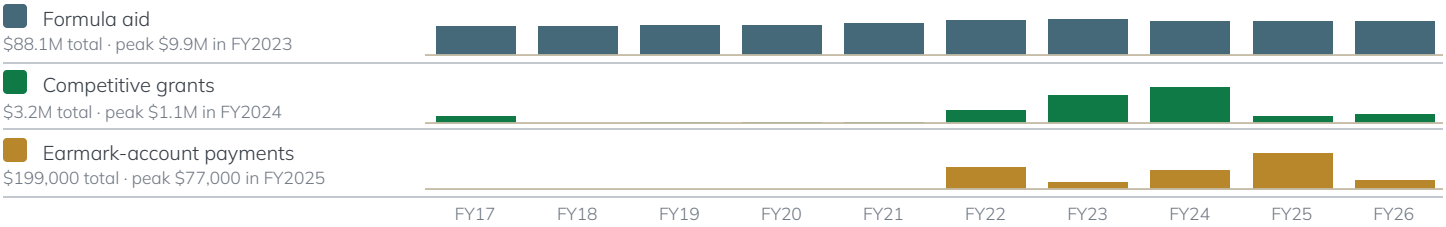
Groveland received more than its share of discretionary money on all four measures; its blended score of 59 stays between 56 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Groveland's town government and school districts received $88.1 million in formula aid and $3.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$88.1M	$3.2M	$199,000
$13,007 per resident (112th of 351) · gross	$476 per resident (145th of 351)	$29.44 per resident (149th of 351)

Competitive grants to Groveland peaked in FY2024 at $1.1 million, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2 million, are not shown.

EARMARKS

Groveland received $248,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$248,000	$248,000	$248,000	Not a member
$36.55 per resident (202nd of 351)	$36.55 per resident (216th of 351)	$36.55 per resident (219th of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. Every one names Groveland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$50,000	"weed removal and water quality measurement for Johnson's pond in the town of Groveland"	Enacted names the town
FY2026	$25,000	"the town of Groveland for a comprehensive market analysis and feasibility study for 46 Washington street"	Enacted names the town
FY2025	$25,000	"a side-by-side vehicle for the police department in the town of Groveland"	Enacted names the town
FY2024	$25,000	"a soil exploration and minor repairs of Johnson creek dam in the town of Groveland"	Enacted names the town
FY2022	$25,000	"clear the remaining area of Johnsons pond in the town of Groveland for boating and fishing"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Groveland received 95% of its proportional share of competitive grant awards.

Local road miles **44.7** 271st of 351 · 6.6 per 1,000 residents (172nd of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **52** 254th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **8.9 sq mi** 27% state-owned	Seasonal homes **0%** share of housing units	Peak service population **6,777** residents plus seasonal	Core infrastructure index **0.76** roads, culverts, dams, coast, flood, energy

Burden index 0.95; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,608 acres** 28.3% of land area · FY2026	State-owned land PILOT, FY2026 **$215,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$134** statewide $117 · FY2026	New growth per resident **$14,688** FY2017–2025 · 257th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.4% of Groveland's general-fund spending in FY2025, down from 9.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.6%** $965,000 of $10.1M · median town 14.1%	FY2016 **6.0%** $885,000 of $14.8M · median town 12.2%	FY2025 **5.4%** $1.2M of $22.8M · median town 11.5%	Net of state charges, FY2025 **5.0%** FY2010: 6.2% · median town 10.0%

Groveland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Groveland's state aid did not keep pace with either price measure: FY2025 aid was 17.3% below its FY2006 aid grown by Boston-area consumer prices and 26.5% below grown by the government price index.

Gross state aid went from $965,000 in FY2006 to $1.2 million in FY2025, +28.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.2%** $393,000 to $567,000 · all towns +54.0%	All fixed costs, FY2016–25 **+97.6%** $875,000 to $1.7M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Groveland's health insurance would have been $491,000 in FY2025; it was $567,000, $76,000 above the path. Its fixed costs would have been $1.09 million in FY2025; it was $1.73 million, $636,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Groveland came to $203,000, 116.6% of the $174,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$203,000	116.6%	28.2%
Placed in the town	$203,000	116.6%	42.3%
Everything placed	$203,000	116.6%	45.2%

SCHOOLS

Groveland's required school contribution is 2.5% of median household income, 230th highest of 351.

Chapter 70 aid, FY2026 **$6.1M** attributed to the town	Required local contribution **$9.3M** FY2026
Share of household income **2.5%** 230th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–12%** after inflation

Groveland has no school district of its own. Its pupils attend Groveland, Pentucket and Whittier; Groveland accounts for 100%, 39% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Groveland received $3.5 million in earmarks placed in the town and competitive grants over ten years, about the $3.6 million its size, need and institutions predict.

PEERS

Groveland ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Groveland this town	**52**	**$13,007**	**$476**	**$36.55**	**0.95**	**2.5%**
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Stow peer	33	$7,771	$488	$90.02	2.17	2.4%
Rowley peer	41	$9,213	$259	$26.57	0.42	2.7%
Dighton peer	56	$15,030	$168	$76.89	0.53	2.4%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Hadley

Town · Hampshire County · 5,306 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Hampshire · Homar Gómez

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Hadley Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Hadley scores 38 on the Fairness Index for all state aid and 80 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

244th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	36	40	42

Rank under other weightings: 207th to 275th.

Stable low: below 45 under every weighting

Hadley received less than its share of state aid on all four measures; its blended score of 38 stays between 35 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

80 / 100

74th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
80	83	74	86

Rank under other weightings: 64th to 80th.

Stable high: above 55 under every weighting

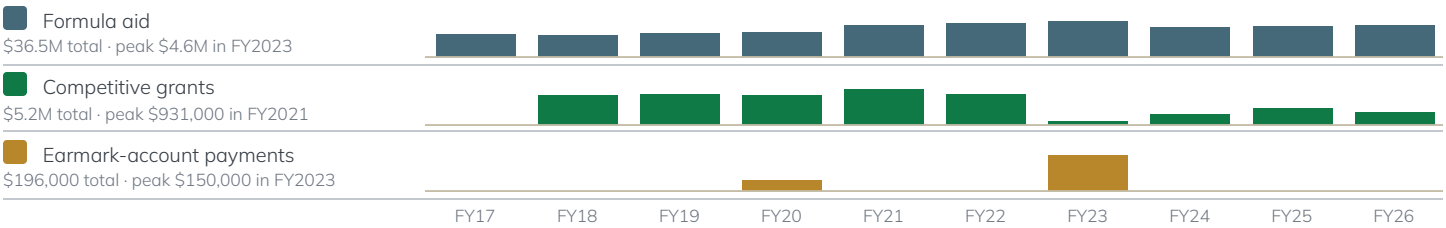
Hadley received more than its share of discretionary money on all four measures; its blended score of 80 stays between 78 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hadley's town government and school districts received $36.5 million in formula aid and $5.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$36.5M	**$5.2M**	**$196,000**
$6,882 per resident (294th of 351) · gross	$989 per resident (79th of 351)	$36.94 per resident (121st of 351)

Competitive grants to Hadley were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.7 million, are not shown.

EARMARKS

Hadley received $226,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$226,000	**$226,000**	**$226,000**	**Not a member**
$42.59 per resident (169th of 351)	$42.59 per resident (190th of 351)	$42.59 per resident (193rd of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2026. Every one names Hadley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the construction of a softball field in the town of Hadley"	Enacted names the town
FY2019	$75,000	"the Hadley Senior Center"	Enacted names the town
FY2020	$46,000	"the Hadley police department to purchase dash and body cameras"	Enacted names the town
FY2026	$5,000	"Meghan's Light, Inc. in the town of Hadley for food assistance to individuals struggling with cystic fibrosis"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hadley received 2.48 times its proportional share of competitive grant awards.

Local road miles **66.0** 200th of 351 · 12.4 per 1,000 residents (83rd of 351)	Town-owned bridges, replacement cost **$8.4M** scored exposure $1.9M · one in poor condition	Road-stream crossings **78** 172nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **23.1 sq mi** 7% state-owned	Seasonal homes **3%** share of housing units	Peak service population **5,454** residents plus seasonal	Core infrastructure index **0.96** roads, culverts, dams, coast, flood, energy

Burden index 2.48; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,511 acres** 10.2% of land area · FY2026	State-owned land PILOT, FY2026 **$349,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$231** statewide $117 · FY2026	New growth per resident **$26,932** FY2017–2025 · 126th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.7% of Hadley's general-fund spending in FY2025, down from 15.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.0%** $1.7M of $11.2M · median town 14.1%	FY2016 **15.6%** $2.3M of $14.8M · median town 12.2%	FY2025 **14.7%** $3.5M of $23.5M · median town 11.5%	Net of state charges, FY2025 **8.2%** FY2010: 10.3% · median town 10.0%

Hadley's state aid kept pace with both price measures: FY2025 aid was 33.0% above its FY2006 aid grown by Boston-area consumer prices and 18.2% above grown by the government price index.

Gross state aid went from $1.7 million in FY2006 to $3.5 million in FY2025, +106.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.4%** $1.1M to $1.6M · all towns +54.0%	All fixed costs, FY2016–25 **+86.9%** $2.3M to $4.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hadley's health insurance would have been $1.35 million in FY2025; it was $1.58 million, $222,000 above the path. Its fixed costs would have been $2.92 million in FY2025; it was $4.36 million, $1.45 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hadley came to $221,000, 44.9% of the $492,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$221,000	44.9%	28.2%
Placed in the town	$221,000	44.9%	42.3%
Everything placed	$221,000	44.9%	45.2%

SCHOOLS

Hadley's required school contribution is 2.0% of median household income, 313th highest of 351.

Chapter 70 aid, FY2026 **$1.5M** to the town's district	Required local contribution **$5.4M** FY2026
Share of household income **2.0%** 313th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+48%** after inflation

Hadley runs its own school district.

EXPECTED AND ACTUAL

Hadley received $6.7 million in earmarks placed in the town and competitive grants over ten years, 36% more than the $4.9 million its size, need and institutions predict.

PEERS

Hadley ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hadley this town	**38**	**$6,882**	**$989**	**$42.59**	**2.48**	**2.0%**
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Marion peer	30	$6,631	$643	$12.24	0.43	2.7%
Essex peer	32	$7,261	$477	$208	0.75	2.6%
Boylston peer	32	$7,545	$121	$68.71	0.67	2.6%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Hinsdale lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Halifax

Town · Plymouth County · 7,748 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Plymouth · Kathleen R. LaNatra
53% of residents
6th Plymouth · Kenneth P. Sweezey
47% of residents
Halifax is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

Halifax Public Schools, the town's own district
Silver Lake Regional School District, shared with Kingston and Plympton

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Halifax scores 48 on the Fairness Index for all state aid and 38 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100
141st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	57	45	40

Rank under other weightings: 125th to 155th.

Weighting-dependent: the range crosses the 45–55 band

Halifax received less than its share of state aid on three of four measures; its blended score of 48 stays between 45 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

38 / 100
230th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	46	37	30

Rank under other weightings: 224th to 242nd.

Stable low: below 45 under every weighting

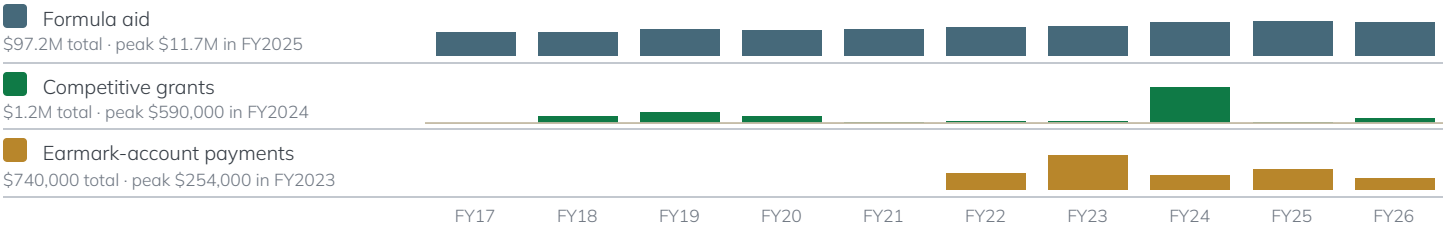
Halifax received less than its share of discretionary money on all four measures; its blended score of 38 stays between 35 and 40 under every weighting tested.

STATE MONEY, FY2017–FY2026

Halifax's town government and school districts received $97.2 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$97.2M	**$1.2M**	**$740,000**
$12,543 per resident (123rd of 351) · gross	$155 per resident (286th of 351)	$95.47 per resident (26th of 351)

Competitive grants to Halifax peaked in FY2024 at $590,000, 49% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.5 million, are not shown.

EARMARKS

Halifax received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$1.2M**	**$1.2M**	**Not a member**
$155 per resident (14th of 351)	$155 per resident (22nd of 351)	$155 per resident (28th of 351)	35 municipalities had none

Placed in the town: 14 clauses in nine of ten budgets; the most recent in FY2026. Every one names Halifax directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$155,000	"the Central Plymouth county water district commission for stakeholder engagement, public outreach and education to address water quality and quantity…"	Enacted names the town
FY2023	$125,000	"the testing and treatment of cyanobacteria and related contaminants in Monponsett pond in the town of Halifax"	Enacted names the town
FY2020	$125,000	"the testing and treatment of cyanobacteria and related contaminants in Monponsett pond in the town of Halifax"	Enacted names the town
FY2019	$125,000	"the testing and treatment of cyanobacteria and related contaminants in Monponsett Pond in the town of Halifax"	Enacted names the town
FY2022	$124,000	"the testing and treatment of cyanobacteria and related contaminants in Monponsett pond in the town of Halifax"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Halifax received 34% of its proportional share of competitive grant awards.

Local road miles **52.1** 242nd of 351 · 6.7 per 1,000 residents (166th of 351)	Town-owned bridges, replacement cost **$11.8M** scored exposure $3.4M · one in poor condition	Road-stream crossings **63** 219th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.0 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **7,748** residents plus seasonal	Core infrastructure index **0.51** roads, culverts, dams, coast, flood, energy

Burden index 0.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,165 acres** 11.4% of land area · FY2026	State-owned land PILOT, FY2026 **$86,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$73.89** statewide $117 · FY2026	New growth per resident **$12,214** FY2017–2025 · 290th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.3% of Halifax's general-fund spending in FY2025, down from 24.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.2%** $3.7M of $15.3M · median town 14.1%	FY2016 **19.1%** $3.8M of $19.7M · median town 12.2%	FY2025 **17.3%** $5M of $28.7M · median town 11.5%	Net of state charges, FY2025 **16.6%** FY2010: 20.8% · median town 10.0%

Halifax's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Halifax's state aid did not keep pace with either price measure: FY2025 aid was 13.5% below its FY2006 aid grown by Boston-area consumer prices and 23.1% below grown by the government price index.

Gross state aid went from $3.7 million in FY2006 to $5 million in FY2025, +34.2% in dollars. Flag: in FY2010, $280,000 of Halifax's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.5%** $953,000 to $1.3M · all towns +54.0%	All fixed costs, FY2016–25 **+74.4%** $2.1M to $3.7M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Halifax's health insurance would have been $1.19 million in FY2025; it was $1.31 million, $121,000 above the path. Its fixed costs would have been $2.62 million in FY2025; it was $3.66 million, $1.04 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Halifax came to $1.1 million, 3.0 times the $358,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	3.0 times	28.2%
Placed in the town	$1.1M	3.0 times	42.3%
Everything placed	$1.1M	3.0 times	45.2%

SCHOOLS

Halifax's required school contribution is 2.6% of median household income, 193rd highest of 351.

Chapter 70 aid, FY2026 **$7.7M** to the town's district	Required local contribution **$9.1M** FY2026
Share of household income **2.6%** 193rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

Halifax runs its own district for some grades and belongs to Silver Lake for others; Halifax accounts for 32% of that district's foundation budget.

EXPECTED AND ACTUAL

Halifax received $2.4 million in earmarks placed in the town and competitive grants over ten years, 73% of the $3.3 million its size, need and institutions predict.

PEERS

Halifax ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Halifax this town	**48**	**$12,543**	**$155**	**$155**	**0.34**	**2.6%**
Sturbridge peer	51	$13,598	$158	$56.22	0.74	2.5%
Douglas peer	58	$14,824	$571	$28.78	1.44	2.2%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Berkley lowest in class of 30	51	$12,903	$95.35	$13.91	0.18	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Hamilton

Town · Essex County · 7,600 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Essex · Kristin E. Kassner

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Hamilton-Wenham Regional School District, shared with Wenham
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Lynnfield, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Hamilton scores 30 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

306th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	40	30	17

Rank under other weightings: 287th to 330th.

Stable low: below 45 under every weighting

Hamilton received less than its share of state aid on all four measures; its blended score of 30 stays between 26 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

290th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	33	27	14

Rank under other weightings: 278th to 303rd.

Stable low: below 45 under every weighting

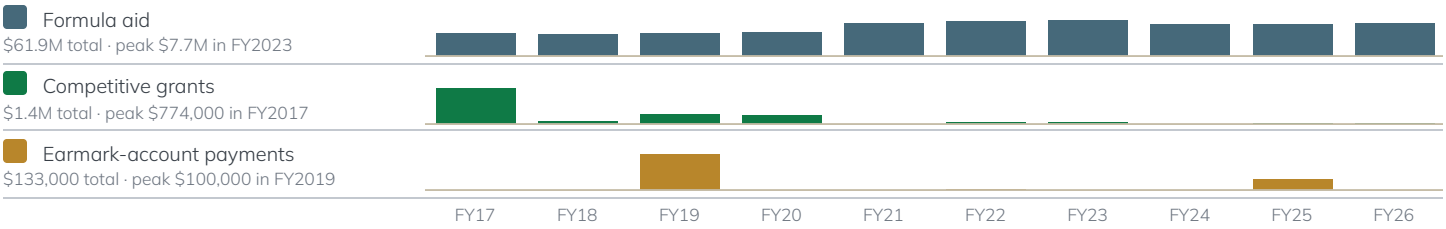
Hamilton received less than its share of discretionary money on all four measures; its blended score of 25 stays between 22 and 28 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hamilton's town government and school districts received $61.9 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$61.9M	$1.4M	$133,000
$8,144 per resident (245th of 351) · gross	$188 per resident (259th of 351)	$17.52 per resident (216th of 351)

Competitive grants to Hamilton peaked in FY2017 at $774,000, 54% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.5 million, are not shown.

EARMARKS

Hamilton received $253,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$253,000	$253,000	$253,000	Not a member
$33.29 per resident (212th of 351)	$33.29 per resident (224th of 351)	$33.29 per resident (227th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2026. Every one names Hamilton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"public safety improvements in the town of Hamilton"	Enacted names the town
FY2026	$40,000	"the town of Hamilton for an ambulance"	Enacted names the town
FY2023	$25,000	"the town of Hamilton for fuel tank and pump replacement"	Enacted names the town
FY2021	$23,000 (split 11 ways)	"equally to the city of Gloucester and the towns of Boxford, Essex, Georgetown, Groveland, Hamilton, Ipswich, Manchester-by-the-Sea, Middleton…"	Enacted names the town
FY2025	$20,000	"Patton park playground and accessibility improvements in the town of Hamilton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hamilton received 53% of its proportional share of competitive grant awards.

Local road miles **44.8** 270th of 351 · 5.9 per 1,000 residents (194th of 351)	Town-owned bridges, replacement cost **$6.2M** scored exposure $2.4M · 0.5 in poor condition	Road-stream crossings **57** 236th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.2 sq mi** 5% state-owned	Seasonal homes **3%** share of housing units	Peak service population **7,809** residents plus seasonal	Core infrastructure index **0.97** roads, culverts, dams, coast, flood, energy

Burden index 0.53; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **553 acres** 6.1% of land area · FY2026	State-owned land PILOT, FY2026 **$239,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$433** statewide $117 · FY2026	New growth per resident **$18,063** FY2017–2025 · 214th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.8% of Hamilton's general-fund spending in FY2025, down from 4.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.1%** $833,000 of $20.5M · median town 14.1%	FY2016 **3.0%** $795,000 of $26.8M · median town 12.2%	FY2025 **2.8%** $1.1M of $40.6M · median town 11.5%	Net of state charges, FY2025 **2.2%** FY2010: 2.2% · median town 10.0%

Hamilton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hamilton's state aid did not keep pace with either price measure: FY2025 aid was 12.0% below its FY2006 aid grown by Boston-area consumer prices and 21.8% below grown by the government price index.

Gross state aid went from $833,000 in FY2006 to $1.1 million in FY2025, +36.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+35.3%** $792,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+61.7%** $1.8M to $2.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hamilton's health insurance would have been $989,000 in FY2025; it was $1.07 million, $82,000 above the path. Its fixed costs would have been $2.20 million in FY2025; it was $2.85 million, $648,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hamilton came to $206,000, 73.8% of the $279,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$206,000	73.8%	28.2%
Placed in the town	$206,000	73.8%	42.3%
Everything placed	$206,000	73.8%	45.2%

SCHOOLS

Hamilton's required school contribution is 3.4% of median household income, 19th highest of 351.

Chapter 70 aid, FY2026 **$2.9M** attributed to the town	Required local contribution **$11.8M** FY2026
Share of household income **3.4%** 19th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Hamilton has no school district of its own. Its pupils attend Hamilton-Wenham and Essex North Shore; Hamilton accounts for 65% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Hamilton received $1.8 million in earmarks placed in the town and competitive grants over ten years, 52% of the $3.4 million its size, need and institutions predict.

PEERS

Hamilton ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hamilton this town	**30**	**$8,144**	**$188**	**$33.29**	**0.53**	**3.4%**
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Marion peer	30	$6,631	$643	$12.24	0.43	2.7%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Essex best in class of 30	32	$7,261	$477	$208	0.75	2.6%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Hampden

Town · Hampden County · 4,946 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
2nd Hampden · Brian M. Ashe	**Hampden, Hampshire and Worcester** · Jacob R. Oliveira	**Hampden-Wilbraham Regional School District**, shared with Wilbraham	Pioneer Valley Planning Commission

FAIRNESS INDEX

Hampden scores 31 on the Fairness Index for all state aid and 19 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

297th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	33	35	24

Rank under other weightings: 264th to 314th.

Stable low: below 45 under every weighting

Hampden received less than its share of state aid on all four measures; its blended score of 31 stays between 30 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

19 / 100

319th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
20	20	21	14

Rank under other weightings: 312th to 327th.

Stable low: below 45 under every weighting

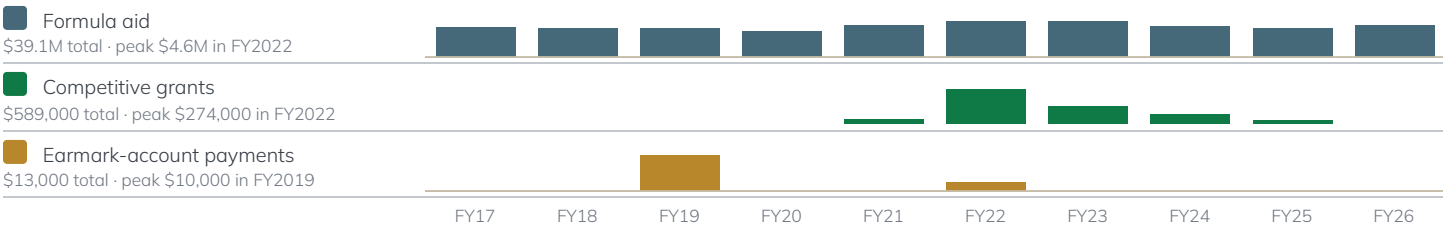
Hampden received less than its share of discretionary money on all four measures; its blended score of 19 stays between 18 and 20 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hampden's town government and school districts received $39.1 million in formula aid and $589,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$39.1M	**$589,000**	**$13,000**
$7,912 per resident (257th of 351) · gross	$119 per resident (315th of 351)	$2.54 per resident (309th of 351)

Competitive grants to Hampden peaked in FY2022 at $274,000, 47% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.3 million, are not shown.

EARMARKS

Hampden received $210,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$210,000	**$210,000**	**$210,000**	**Not a member**
$42.46 per resident (170th of 351)	$42.46 per resident (191st of 351)	$42.46 per resident (194th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2026. Every one names Hampden directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"the removal of dead trees and brush on public ways as a result of a gypsy moth infestation in the town of Hampden"	Enacted names the town
FY2026	$90,000	"town hall security improvements in the town of Hampden"	Enacted names the town
FY2020	$15,000	"the town of Hampden for a feasibility study to determine the costs and needs associated with the renovation or replacement of the existing senior..."	Enacted names the town
FY2024	$5,000	"the Pat Ledoux Post No. 9397, V.F.W. OF U.S., INC. in the town of Hampden to purchase a surveillance system"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hampden received 1.10 times its proportional share of competitive grant awards.

Local road miles **53.9** 237th of 351 · 10.9 per 1,000 residents (95th of 351)	Town-owned bridges, replacement cost **$12.1M** scored exposure $4.9M · three in poor condition	Road-stream crossings **53** 249th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.6 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,946** residents plus seasonal	Core infrastructure index **1.23** roads, culverts, dams, coast, flood, energy

Burden index 1.10; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$23,749** FY2017–2025 · 146th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.3% of Hampden's general-fund spending in FY2025, down from 7.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.7%** $669,000 of $8.7M · median town 14.1%	FY2016 **5.5%** $672,000 of $12.1M · median town 12.2%	FY2025 **5.3%** $900,000 of $17M · median town 11.5%	Net of state charges, FY2025 **5.3%** FY2010: 6.2% · median town 10.0%

Hampden's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hampden's state aid did not keep pace with either price measure: FY2025 aid was 13.3% below its FY2006 aid grown by Boston-area consumer prices and 22.9% below grown by the government price index.

Gross state aid went from $669,000 in FY2006 to $900,000 in FY2025, +34.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+246.4%** $206,000 to $715,000 · all towns +54.0%	All fixed costs, FY2016–25 **+207.5%** $543,000 to $1.7M · all towns +53.0%	Years squeezed **9 of 9** fixed costs grew faster than allowed levy growth	Health insurance **8 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hampden's health insurance would have been $258,000 in FY2025; it was $715,000, $457,000 above the path. Its fixed costs would have been $678,000 in FY2025; it was $1.67 million, $991,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+33%); health insurance changed by more than 30% in one year in FY2023 (+70%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hampden came to $120,000, 23.6% of the $509,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$120,000	23.6%	28.2%
Placed in the town	$120,000	23.6%	42.3%
Everything placed	$120,000	23.6%	45.2%

SCHOOLS

Hampden's required school contribution is 3.0% of

EXPECTED AND ACTUAL

Hampden received $799,000 in earmarks placed in the town and competitive grants over ten years, 36%

median household income, 70th highest of 351.

Chapter 70 aid, FY2026 **$1.6M** attributed to the town	Required local contribution **$6.2M** FY2026
Share of household income **3.0%** 70th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–25%** after inflation

Hampden has no school district of its own. Its pupils attend Hampden-Wilbraham; Hampden accounts for 20% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $2.2 million its size, need and institutions predict.

PEERS

Hampden ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hampden this town	**31**	**$7,912**	**$119**	**$42.46**	**1.10**	**3.0%**
Granby peer	49	$12,582	$104	$26.32	0.31	2.4%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
Conway lowest in class of 30	48	$12,799	$405	$0	0.68	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Hancock

Town · Berkshire County · 752 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Hancock Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Hancock scores 43 on the Fairness Index for all state aid and 45 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

183rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	43	27	60

Rank under other weightings: 141st to 258th.

Weighting-dependent: the range crosses the 45–55 band

Hancock received less than its share of state aid on three of four measures; its blended score of 43 stays between 38 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

45 / 100

205th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	46	24	63

Rank under other weightings: 184th to 231st.

Weighting-dependent: the range crosses the 45–55 band

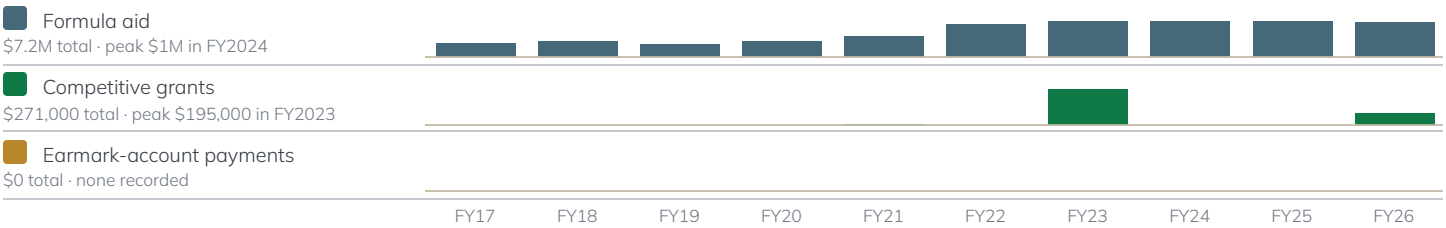
Hancock received less than its share of discretionary money on three of four measures; its blended score of 45 stays between 39 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hancock's town government and school districts received $7.2 million in formula aid and $271,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$7.2M	**$271,000**	**$0**
$9,560 per resident (191st of 351) · gross	$360 per resident (185th of 351)	$0 per resident (339th of 351)

Competitive grants to Hancock peaked in FY2023 at $195,000, 72% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 752 residents, a single payment moves Hancock's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

No local earmark was placed in Hancock in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Hancock's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Leverett	$215,000	$215,000	$215,000	$134
Becket	$0	$0	$0	$0
Worthington	$60,000	$60,000	$60,000	$58.77
Blandford	$0	$0	$0	$0
Egremont	$0	$485,000	$485,000	$394

WHAT THE TOWN CARRIES

Measured against what it maintains, Hancock received 91% of its proportional share of competitive grant awards.

Local road miles **14.9** 346th of 351 · 19.9 per 1,000 residents (58th of 351)	Town-owned bridges, replacement cost **$3.7M** scored exposure $449,000 · none in poor condition	Road-stream crossings **54** 246th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **35.7 sq mi** 38% state-owned	Seasonal homes **62%** share of housing units	Peak service population **2,073** residents plus seasonal	Core infrastructure index **0.52** roads, culverts, dams, coast, flood, energy

Burden index 0.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **6,113 acres** 26.8% of land area · FY2026	State-owned land PILOT, FY2026 **$77,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$12.59** statewide $117 · FY2026	New growth per resident **$49,296** FY2017–2025 · 38th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 32.0% of Hancock's general-fund spending in FY2025, up from 19.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **19.6%** $300,000 of $1.5M · median town 14.1%	FY2016 **17.4%** $315,000 of $1.8M · median town 12.2%	FY2025 **32.0%** $765,000 of $2.4M · median town 11.5%	Net of state charges, FY2025 **29.9%** FY2010: 20.2% · median town 10.0%

Hancock's state aid kept pace with both price measures: FY2025 aid was 64.6% above its FY2006 aid grown by Boston-area consumer prices and 46.3% above grown by the government price index.

Gross state aid went from $300,000 in FY2006 to $765,000 in FY2025, +155.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 **+24.2%** $52,000 to $65,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 7** years it grew faster than allowed levy growth · two years not reported

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hancock's fixed costs would have been $65,000 in FY2025; it was $65,000, $340 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (–51%), FY2019 (+32%) and FY2023 (+53%); health insurance changed by more than 30% in one year in FY2021 (+260%), FY2022 (–72%), FY2023 (+124%), FY2024 (+104%) and FY2025 (–36%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Hancock's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	not reported	28.2%
Placed in the town	$0	not reported	42.3%
Everything placed	$0	not reported	45.2%

SCHOOLS

Hancock's required school contribution is 2.9% of median household income, 95th highest of 351.

Chapter 70 aid, FY2026 **$463,000** to the town's district	Required local contribution **$855,000** FY2026
Share of household income **2.9%** 95th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+44%** after inflation

Hancock runs its own school district.

EXPECTED AND ACTUAL

Hancock received $271,000 in earmarks placed in the town and competitive grants over ten years, 11% of the $2.6 million its size, need and institutions predict.

PEERS

Hancock is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hancock this town	**43**	**$9,560**	**$360**	**$0**	**0.91**	**2.9%**
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Becket peer · lowest in class of 30	50	$9,450	$3,826	$0	2.09	3.5%
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Hanover

Town · Plymouth County · 14,845 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Plymouth · David F. DeCoste

STATE SENATE

Norfolk and Plymouth · John F. Keenan

SCHOOL DISTRICTS

Hanover Public Schools, the town's own district

South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanson, Marshfield, Norwell, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council and Old Colony Planning Council

FAIRNESS INDEX

Hanover scores 38 on the Fairness Index for all state aid and 32 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

240th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	52	29	34

Rank under other weightings: 210th to 250th.

Stable low: below 45 under every weighting

Hanover received less than its share of state aid on three of four measures; its blended score of 38 stays between 34 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

32 / 100

263rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	43	28	26

Rank under other weightings: 251st to 265th.

Stable low: below 45 under every weighting

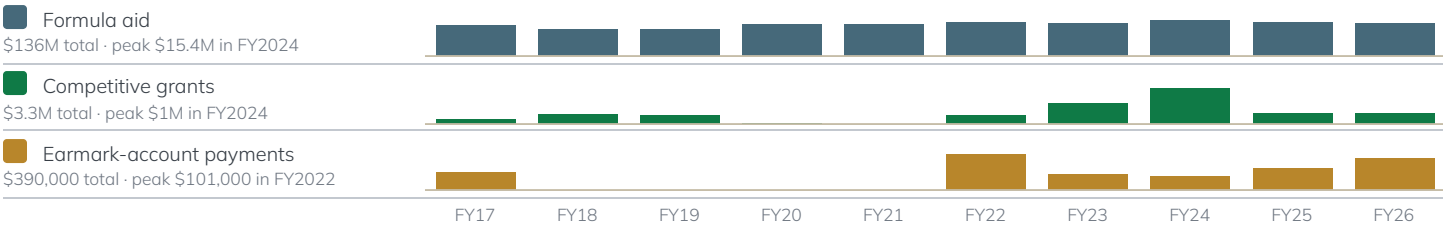
Hanover received less than its share of discretionary money on all four measures; its blended score of 32 stays between 29 and 34 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hanover's town government and school districts received $136 million in formula aid and $3.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$136M	**$3.3M**	**$390,000**
$9,140 per resident (215th of 351) · gross	$220 per resident (242nd of 351)	$26.26 per resident (168th of 351)

Competitive grants to Hanover peaked in FY2024 at $1 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.6 million, are not shown.

EARMARKS

Hanover received $280,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$280,000	**$280,000**	**$280,000**	**Not a member**
$18.83 per resident (268th of 351)	$18.83 per resident (278th of 351)	$18.83 per resident (278th of 351)	35 municipalities had none

Placed in the town: 12 clauses in six of ten budgets; the most recent in FY2026. Every one names Hanover directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the firefighter cadet program at South Shore vocational technical high school in the town of Hanover"	Enacted names the town
FY2017	$50,000	"improvements to the veteran's memorial in the town of Hanover"	Enacted names the town
FY2025	$32,000	"the council on aging in the town of Hanover for programming and services"	Enacted names the town
FY2026	$30,000	"South Shore regional vocational technical high school in the town of Hanover for its firefighter cadet"	Enacted names the town
FY2022	$25,000	"the Hanover cultural council, in the town of Hanover, for the planning and assistance of Hanover Day"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hanover received 60% of its proportional share of competitive grant awards.

Local road miles **86.6** 130th of 351 · 5.8 per 1,000 residents (198th of 351)	Town-owned bridges, replacement cost **$5.6M** scored exposure $1.2M · none in poor condition	Road-stream crossings **98** 120th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **15.5 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **14,845** residents plus seasonal	Core infrastructure index **0.56** roads, culverts, dams, coast, flood, energy

Burden index 0.60; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$14,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$5,298** statewide $117 · FY2026	New growth per resident **$22,996** FY2017–2025 · 153rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.1% of Hanover's general-fund spending in FY2025, down from 21.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.6%** $8.4M of $38.7M · median town 14.1%	FY2016 **17.1%** $9.7M of $56.7M · median town 12.2%	FY2025 **14.1%** $10.6M of $75.1M · median town 11.5%	Net of state charges, FY2025 **12.9%** FY2010: 18.7% · median town 10.0%

Hanover's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $394,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hanover's state aid did not keep pace with either price measure: FY2025 aid was 18.5% below its FY2006 aid grown by Boston-area consumer prices and 27.5% below grown by the government price index.

Gross state aid went from $8.4 million in FY2006 to $10.6 million in FY2025, +26.5% in dollars. Flag: in FY2010, $935,000 of Hanover's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.8%** $2.9M to $3.9M · all towns +54.0%	All fixed costs, FY2016–25 **+60.6%** $6.8M to $10.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hanover's health insurance would have been $3.60 million in FY2025; it was $3.86 million, $259,000 above the path. Its fixed costs would have been $8.45 million in FY2025; it was $10.9 million, $2.42 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hanover came to $201,000, 20.6% of the $977,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$201,000	20.6%	28.2%
Placed in the town	$201,000	20.6%	42.3%
Everything placed	$201,000	20.6%	45.2%

SCHOOLS

Hanover's required school contribution is 2.8% of median household income, 115th highest of 351.

Chapter 70 aid, FY2026 **$8.5M** to the town's district	Required local contribution **$27.1M** FY2026
Share of household income **2.8%** 115th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–9%** after inflation

Hanover runs its own school district and also belongs to South Shore; Hanover accounts for 12% of that district's foundation budget.

EXPECTED AND ACTUAL

Hanover received $6.5 million in earmarks placed in the town and competitive grants over ten years, 42% more than the $4.6 million its size, need and institutions predict.

PEERS

Hanover ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hanover this town	**38**	**$9,140**	**$220**	**$18.83**	**0.60**	**2.8%**
Northborough peer	35	$8,121	$93.72	$29.37	0.29	3.0%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Hanson

Town · Plymouth County · 10,660 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Plymouth · Kenneth P. Sweezey
67% of residents

5th Plymouth · David F. DeCoste 33% of residents

Hanson is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

Whitman-Hanson Regional School District, shared with Whitman

South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Marshfield, Norwell, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Hanson scores 51 on the Fairness Index for all state aid and 39 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

114th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	59	48	49

Rank under other weightings: 97th to 121st.

Near fair: between 45 and 55 under every weighting

Hanson received less than its share of state aid on three of four measures; its blended score of 51 stays between 49 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

39 / 100

227th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	45	43	35

Rank under other weightings: 216th to 231st.

Stable low: below 45 under every weighting

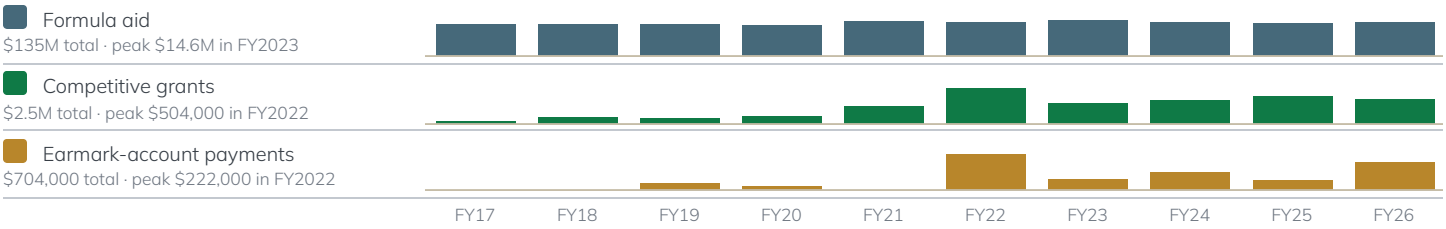
Hanson received less than its share of discretionary money on all four measures; its blended score of 39 stays between 36 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hanson's town government and school districts received $135 million in formula aid and $2.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$135M	**$2.5M**	**$704,000**
$12,622 per resident (118th of 351) · gross	$231 per resident (236th of 351)	$66.09 per resident (43rd of 351)

Competitive grants to Hanson peaked in FY2022 at $504,000, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

Hanson received $562,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$562,000	**$562,000**	**$562,000**	**Not a member**
$52.67 per resident (141st of 351)	$52.67 per resident (163rd of 351)	$52.67 per resident (167th of 351)	35 municipalities had none

Placed in the town: 18 clauses in eight of ten budgets; the most recent in FY2026. Every one names Hanson directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"subsurface utility engineering exploration on state highway route 14 in the town of Hanson to meet the Massachusetts Department of Transportation's..."	Enacted names the town
FY2024	$60,000	"rescue training and cardiac screening programs at the Hanson fire department"	Enacted names the town
FY2025	$50,000	"the Hanson fire department for rescue training and cardiac screening programs in the town of Hanson"	Enacted names the town
FY2017	$50,000 (split two ways)	"the testing and treatment of Cyanobacteria and related contaminants in Monponsett Pond in the towns of Halifax and Hanson"	Enacted names the town
FY2023	$33,000	"the Hanson fire department for cardiac screening services for students in the Whitman Hanson school district in the town of Hanson"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hanson received 66% of its proportional share of competitive grant awards.

Local road miles **60.5** 215th of 351 · 5.7 per 1,000 residents (206th of 351)	Town-owned bridges, replacement cost **$2.6M** scored exposure $351,000 · none in poor condition	Road-stream crossings **82** 159th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **15.0 sq mi** 10% state-owned	Seasonal homes **1%** share of housing units	Peak service population **10,729** residents plus seasonal	Core infrastructure index **0.92** roads, culverts, dams, coast, flood, energy

Burden index 0.66; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **979 acres** 10.2% of land area · FY2026	State-owned land PILOT, FY2026 **$76,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$77.23** statewide $117 · FY2026	New growth per resident **$19,856** FY2017–2025 · 188th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.5% of Hanson's general-fund spending in FY2025, down from 9.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.1%** $1.5M of $16.5M · median town 14.1%	FY2016 **6.5%** $1.4M of $21.1M · median town 12.2%	FY2025 **5.5%** $1.8M of $33.3M · median town 11.5%	Net of state charges, FY2025 **5.0%** FY2010: 6.2% · median town 10.0%

Hanson's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hanson's state aid did not keep pace with either price measure: FY2025 aid was 20.7% below its FY2006 aid grown by Boston-area consumer prices and 29.5% below grown by the government price index.

Gross state aid went from $1.5 million in FY2006 to $1.8 million in FY2025, +23.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+56.1%** $1.3M to $2M · all towns +54.0%	All fixed costs, FY2016–25 **+59.2%** $2.9M to $4.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hanson's health insurance would have been $1.62 million in FY2025; it was $2.03 million, $406,000 above the path. Its fixed costs would have been $3.66 million in FY2025; it was $4.67 million, $1.01 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hanson came to $556,000, 76.3% of the $729,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$556,000	76.3%	28.2%
Placed in the town	$556,000	76.3%	42.3%
Everything placed	$556,000	76.3%	45.2%

SCHOOLS

Hanson's required school contribution is 2.6% of median household income, 194th highest of 351.

Chapter 70 aid, FY2026 **$8.9M** attributed to the town	Required local contribution **$13.2M** FY2026
Share of household income **2.6%** 194th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–19%** after inflation

Hanson has no school district of its own. Its pupils attend Hanson, Whitman-Hanson and South Shore; Hanson accounts for 100%, 39% and 10% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Hanson received $3 million in earmarks placed in the town and competitive grants over ten years, 72% of the $4.2 million its size, need and institutions predict.

PEERS

Hanson ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hanson this town	**51**	**$12,622**	**$231**	**$52.67**	**0.66**	**2.6%**
Dighton peer	56	$15,030	$168	$76.89	0.53	2.4%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Rehoboth peer · lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Hardwick

Town · Worcester County · 2,684 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Quabbin Regional School District, shared with Barre, Hubbardston, New Braintree and Oakham

Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Monson, New Braintree, Oakham, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Hardwick scores 63 on the Fairness Index for all state aid and 73 for discretionary money. Fifty is a fair share.

ALL STATE AID

63 / 100

33rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
67	58	60	66

Rank under other weightings: 30th to 40th.

Stable high: above 55 under every weighting

Hardwick received more than its share of state aid on all four measures; its blended score of 63 stays between 60 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

73 / 100

95th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	69	70	76

Rank under other weightings: 92nd to 106th.

Stable high: above 55 under every weighting

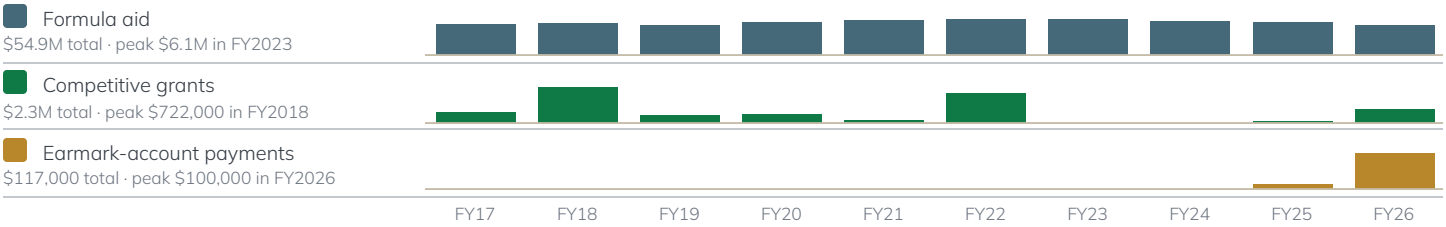
Hardwick received more than its share of discretionary money on all four measures; its blended score of 73 stays between 71 and 75 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hardwick's town government and school districts received $54.9 million in formula aid and $2.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$54.9M	$2.3M	$117,000
$20,446 per resident (23rd of 351) · gross	$849 per resident (88th of 351)	$43.51 per resident (97th of 351)

Competitive grants to Hardwick peaked in FY2018 at $722,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.1 million, are not shown.

EARMARKS

Hardwick received $270,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$270,000	$270,000	$270,000	Not a member
$101 per resident (48th of 351)	$101 per resident (66th of 351)	$101 per resident (75th of 351)	35 municipalities had none

Placed in the town: six clauses in four of ten budgets; the most recent in FY2026. Every one names Hardwick directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"make repairs to the fire hydrant system in the town of Hardwick"	Enacted names the town
FY2025	$50,000	"town hall upgrades in the town of Hardwick"	Enacted names the town
FY2026	$40,000	"Hardwick Pond Preservation Association, Inc. for invasive species control on Hardwick pond in the town of Hardwick"	Enacted names the town
FY2018	$40,000	"Hardwick Pond Preservation Association, Inc. for invasive species control on Hardwick pond in the town of Hardwick"	Enacted names the town
FY2017	$25,000	"the town of Hardwick for public safety improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hardwick received 2.32 times its proportional share of competitive grant awards.

Local road miles **85.6** 135th of 351 · 31.9 per 1,000 residents (39th of 351)	Town-owned bridges, replacement cost **$14.6M** scored exposure $4.4M · 2.5 in poor condition	Road-stream crossings **136** 56th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **38.6 sq mi** 26% state-owned	Seasonal homes **0%** share of housing units	Peak service population **2,684** residents plus seasonal	Core infrastructure index **3.14** roads, culverts, dams, coast, flood, energy

Burden index 2.32; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,113 acres** 8.6% of land area · FY2026	State-owned land PILOT, FY2026 **$115,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$54.52** statewide $117 · FY2026	New growth per resident **$8,899** FY2017–2025 · 331st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.0% of Hardwick's general-fund spending in FY2025, down from 11.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.4%** $437,000 of $3.8M · median town 14.1%	FY2016 **10.3%** $513,000 of $5M · median town 12.2%	FY2025 **11.0%** $727,000 of $6.6M · median town 11.5%	Net of state charges, FY2025 **10.7%** FY2010: 10.8% · median town 10.0%

Hardwick's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hardwick's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 7.4% above its FY2006 aid grown by Boston-area consumer prices and 4.6% below grown by the government price index.

Gross state aid went from $437,000 in FY2006 to $727,000 in FY2025, +66.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.7%** $131,000 to $196,000 · all towns +54.0%	All fixed costs, FY2016–25 **+27.5%** $438,000 to $558,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hardwick's health insurance would have been $163,000 in FY2025; it was $196,000, $32,000 above the path. Its fixed costs would have been $547,000 in FY2025; it was $558,000, $11,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (–33%) and FY2018 (+50%); health insurance changed by more than 30% in one year in FY2017 (+56%) and FY2023 (+36%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hardwick came to $130,000, 2.0 times the $65,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$130,000	2.0 times	28.2%
Placed in the town	$130,000	2.0 times	42.3%
Everything placed	$130,000	2.0 times	45.2%

SCHOOLS

Hardwick's required school contribution is 2.5% of median household income, 241st highest of 351.

Chapter 70 aid, FY2026 **$3.2M** attributed to the town	Required local contribution **$2.1M** FY2026
Share of household income **2.5%** 241st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Hardwick has no school district of its own. Its pupils attend Quabbin and Pathfinder; Hardwick accounts for 15% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Hardwick received $5.5 million in earmarks placed in the town and competitive grants over ten years, 74% of the $7.4 million its size, need and institutions predict.

PEERS

Hardwick ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hardwick this town	**63**	**$20,446**	**$849**	**$101**	**2.32**	**2.5%**
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Cheshire peer	55	$14,188	$1,187	$49.75	2.39	2.8%
Huntington peer	63	$18,322	$2,918	$33.78	0.25	2.5%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Harvard

Town · Worcester County · 6,927 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

37th Middlesex · Danillo A. Sena

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Harvard Public Schools, the town's own district

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Holden, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Harvard scores 39 on the Fairness Index for all state aid and 61 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

230th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	52	36	30

Rank under other weightings: 211th to 241st.

Stable low: below 45 under every weighting

Harvard received less than its share of state aid on three of four measures; its blended score of 39 stays between 35 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

61 / 100

138th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	75	51	55

Rank under other weightings: 129th to 153rd.

Stable high: above 55 under every weighting

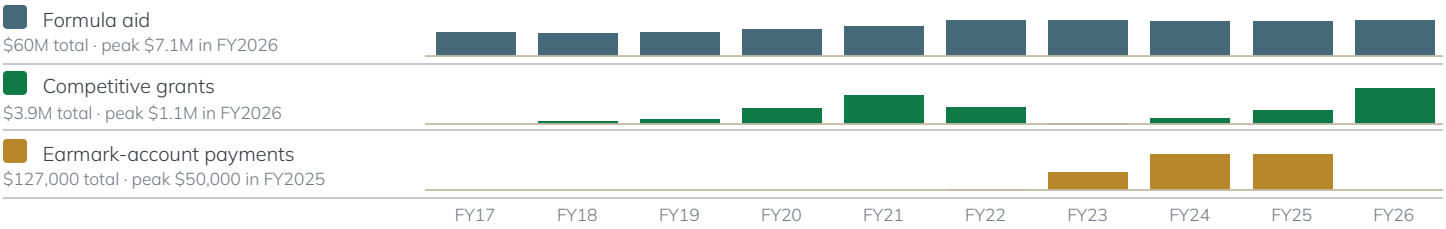
Harvard received more than its share of discretionary money on all four measures; its blended score of 61 stays between 56 and 65 under every weighting tested.

STATE MONEY, FY2017–FY2026

Harvard's town government and school districts received $60 million in formula aid and $3.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$60M	**$3.9M**	**$127,000**
$8,662 per resident (232nd of 351) · gross	$563 per resident (129th of 351)	$18.31 per resident (212th of 351)

Competitive grants to Harvard peaked in FY2026 at $1.1 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.2 million, are not shown.

EARMARKS

Harvard received $125,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$125,000	**$125,000**	**$125,000**	**Not a member**
$18.05 per resident (273rd of 351)	$18.05 per resident (283rd of 351)	$18.05 per resident (283rd of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2026. Every one names Harvard directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"the town of Harvard for improvements to the Old Library building"	Enacted names the town
FY2023	$25,000	"the town of Harvard to reclaim and refurbish its Upper and Lower Depot road fields"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Harvard received about its proportional share of competitive grant awards.

Local road miles **64.0** 205th of 351 · 9.2 per 1,000 residents (117th of 351)	Town-owned bridges, replacement cost **$6.6M** scored exposure $3M · none in poor condition	Road-stream crossings **99** 118th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.4 sq mi** 3% state-owned	Seasonal homes **3%** share of housing units	Peak service population **7,101** residents plus seasonal	Core infrastructure index **1.40** roads, culverts, dams, coast, flood, energy

Burden index 0.96; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **90 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$7,770** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$86.67** statewide $117 · FY2026	New growth per resident **$13,239** FY2017–2025 · 278th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.1% of Harvard's general-fund spending in FY2025, down from 19.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **19.0%** $3.4M of $17.9M · median town 14.1%	FY2016 **14.9%** $3.6M of $24.3M · median town 12.2%	FY2025 **13.1%** $4.5M of $34.3M · median town 11.5%	Net of state charges, FY2025 **11.5%** FY2010: 14.0% · median town 10.0%

Harvard's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $39,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Harvard's state aid did not keep pace with either price measure: FY2025 aid was 14.8% below its FY2006 aid grown by Boston-area consumer prices and 24.2% below grown by the government price index.

Gross state aid went from $3.4 million in FY2006 to $4.5 million in FY2025, +32.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.7%** $2.1M to $2.9M · all towns +54.0%	All fixed costs, FY2016–25 **+41.6%** $3.7M to $5.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Harvard's health insurance would have been $2.61 million in FY2025; it was $2.92 million, $310,000 above the path. Its fixed costs would have been $4.61 million in FY2025; it was $5.23 million, $617,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+30%); health insurance changed by more than 30% in one year in FY2019 (+39%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Harvard came to $25,000, 3.0% of the $831,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	3.0%	28.2%
Placed in the town	$25,000	3.0%	42.3%
Everything placed	$25,000	3.0%	45.2%

SCHOOLS

Harvard's required school contribution is 2.1% of

EXPECTED AND ACTUAL

Harvard received $4.1 million in earmarks placed in the town and competitive grants over ten years, 19%

median household income, 303rd highest of 351.

Chapter 70 aid, FY2026 **$2.5M** to the town's district	Required local contribution **$9.2M** FY2026
Share of household income **2.1%** 303rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Harvard runs its own school district and also belongs to Montachusett; Harvard accounts for 1% of that district's foundation budget.

more than the $3.5 million its size, need and institutions predict.

PEERS

Harvard ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Harvard this town	**39**	**$8,662**	**$563**	**$18.05**	**0.96**	**2.1%**
Boxborough peer	34	$8,257	$231	$43.67	0.36	2.8%
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Harwich

Town · Barnstable County · 13,598 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
4th Barnstable · Hadley Luddy

STATE SENATE
Cape and Islands · Julian Cyr

SCHOOL DISTRICTS
Monomoy Regional School District, shared with Chatham
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Mashpee, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY
Cape Cod Commission

FAIRNESS INDEX

Harwich scores 24 on the Fairness Index for all state aid and 10 for discretionary money. Fifty is a fair share.

ALL STATE AID

24 / 100

346th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	29	26	19

Rank under other weightings: 345th to 347th.

Stable low: below 45 under every weighting

Harwich received less than its share of state aid on all four measures; its blended score of 23 stays between 21 and 26 under every weighting tested.

DISCRETIONARY MONEY ONLY

10 / 100

348th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
10	14	9	9

Rank under other weightings: 345th to 348th.

Stable low: below 45 under every weighting

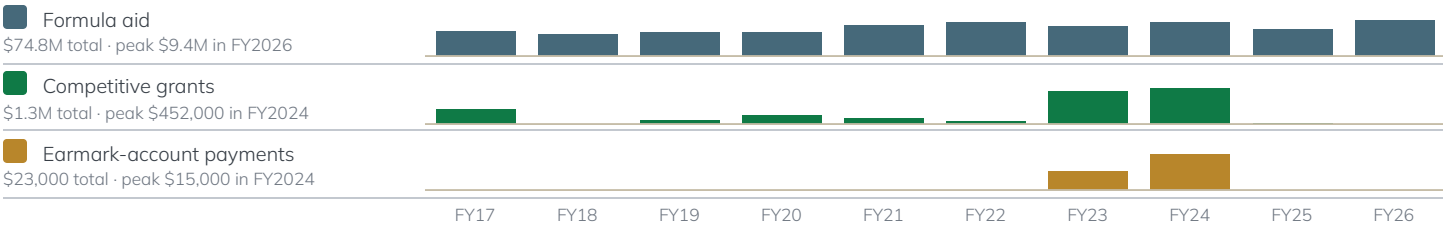
Harwich received less than its share of discretionary money on all four measures; its blended score of 10 stays between 9 and 11 under every weighting tested.

STATE MONEY, FY2017–FY2026

Harwich's town government and school districts received $74.8 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$74.8M	**$1.3M**	**$23,000**
$5,502 per resident (339th of 351) · gross	$93.86 per resident (328th of 351)	$1.69 per resident (319th of 351)

Competitive grants to Harwich peaked in FY2024 at $452,000, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $29.8 million, are not shown.

EARMARKS

Harwich received $67,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$67,000	**$67,000**	**$67,000**	**Not a member**
$4.93 per resident (306th of 351)	$4.93 per resident (312th of 351)	$4.93 per resident (313th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2025. Every one names Harwich directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$67,000	"costs associated with new environmental science and technology and veterinary science programs, including survey and engineering service expenses, at…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Harwich received 59% of its proportional share of competitive grant awards.

Local road miles **141.1** 40th of 351 · 10.4 per 1,000 residents (102nd of 351)	Town-owned bridges, replacement cost **$11.1M** scored exposure $2.3M · none in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.9 sq mi** 2% state-owned	Seasonal homes **34%** share of housing units	Peak service population **20,915** residents plus seasonal	Core infrastructure index **0.97** roads, culverts, dams, coast, flood, energy

Burden index 0.59; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **296 acres** 2.2% of land area · FY2026	State-owned land PILOT, FY2026 **$161,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$546** statewide $117 · FY2026	New growth per resident **$37,063** FY2017–2025 · 72nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

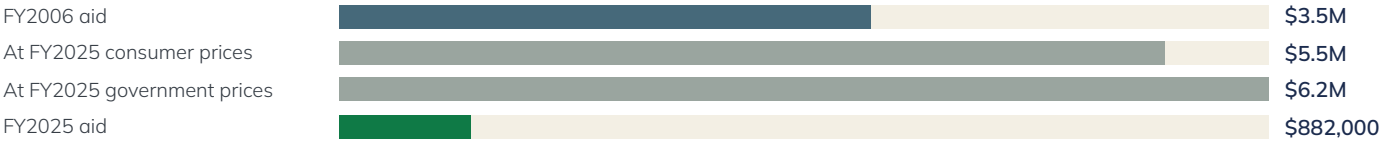
State aid covered 1.1% of Harwich's general-fund spending in FY2025, down from 7.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.2%** $3.5M of $49M · median town 14.1%	FY2016 **2.9%** $1.7M of $56.8M · median town 12.2%	FY2025 **1.1%** $882,000 of $81M · median town 11.5%	Net of state charges, FY2025 **0.0%** FY2010: 4.8% · median town 10.0%

Harwich's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Harwich's state aid did not keep pace with either price measure: FY2025 aid was 84.0% below its FY2006 aid grown by Boston-area consumer prices and 85.7% below grown by the government price index.



Gross state aid went from $3.5 million in FY2006 to $882,000 in FY2025, −75.1% in dollars. Flag: in FY2010, $1.2 million of Harwich's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+64.4%** $3.4M to $5.7M · all towns +54.0%	All fixed costs, FY2016–25 **+73.6%** $6.2M to $10.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Harwich's health insurance would have been $4.30 million in FY2025; it was $5.67 million, $1.36 million above the path. Its fixed costs would have been $7.68 million in FY2025; it was $10.7 million, $3.00 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2022 (−30%) and FY2023 (+56%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Harwich came to $67,000, 3.0% of the $2.22 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$67,000	3.0%	28.2%
Placed in the town	$67,000	3.0%	42.3%
Everything placed	$67,000	3.0%	45.2%

SCHOOLS

Harwich's required school contribution is 2.8% of

EXPECTED AND ACTUAL

Harwich received $1.4 million in earmarks placed in the town and competitive grants over ten years, 24%

median household income, 127th highest of 351.

Chapter 70 aid, FY2026 **$3.9M** attributed to the town	Required local contribution **$17.3M** FY2026
Share of household income **2.8%** 127th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Harwich has no school district of its own. Its pupils attend Monomoy and Cape Cod; Harwich accounts for 77% and 11% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $6.1 million its size, need and institutions predict.

PEERS

Harwich ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Harwich this town	**24**	**$5,502**	**$93.86**	**$4.93**	**0.59**	**2.8%**
Swampscott peer	28	$6,662	$197	$36.11	1.27	2.8%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Sandwich peer	30	$7,257	$332	$24.72	0.71	2.7%
Mashpee peer	26	$6,045	$173	$12.51	0.72	2.8%
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Marion lowest in class of 30	30	$6,631	$643	$12.24	0.43	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Hatfield

Town · Hampshire County · 3,325 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Hampshire · Lindsay N. Sabadosa	**Hampshire, Franklin and Worcester** · Joanne M. Comerford	**Hatfield Public Schools**, the town's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

Hatfield scores 31 on the Fairness Index for all state aid and 82 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

295th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	28	39	26

Rank under other weightings: 253rd to 325th.

Stable low: below 45 under every weighting

Hatfield received less than its share of state aid on all four measures; its blended score of 31 stays between 29 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

82 / 100

67th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
84	82	80	80

Rank under other weightings: 63rd to 70th.

Stable high: above 55 under every weighting

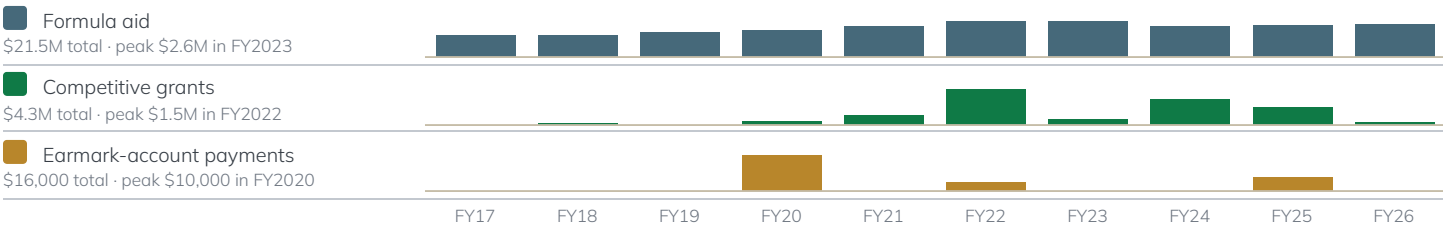
Hatfield received more than its share of discretionary money on all four measures; its blended score of 82 stays between 81 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hatfield's town government and school districts received $21.5 million in formula aid and $4.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$21.5M	**$4.3M**	**$16,000**
$6,480 per resident (319th of 351) · gross	$1,299 per resident (62nd of 351)	$4.92 per resident (287th of 351)

Competitive grants to Hatfield peaked in FY2022 at $1.5 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

Hatfield received $10,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$10,000	**$10,000**	**$10,000**	**Not a member**
$3.01 per resident (310th of 351)	$3.01 per resident (316th of 351)	$3.01 per resident (316th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2020. Every one names Hatfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$10,000	"the celebration of the three hundred and fiftieth anniversary of the town of Hatfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hatfield received 1.78 times its proportional share of competitive grant

awards.

Local road miles **50.2** 252nd of 351 · 15.1 per 1,000 residents (72nd of 351)	Town-owned bridges, replacement cost **$24.1M** scored exposure $6.2M · none in poor condition	Road-stream crossings **34** 307th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.9 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **3,325** residents plus seasonal	Core infrastructure index **0.94** roads, culverts, dams, coast, flood, energy

Burden index 1.78; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **116 acres** 1.1% of land area · FY2026	State-owned land PILOT, FY2026 **$11,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$91.23** statewide $117 · FY2026	New growth per resident **$16,335** FY2017–2025 · 238th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.3% of Hatfield's general-fund spending in FY2025, up from 15.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.8%** $1.1M of $7M · median town 14.1%	FY2016 **23.4%** $2M of $8.5M · median town 12.2%	FY2025 **17.3%** $2.3M of $13.1M · median town 11.5%	Net of state charges, FY2025 **11.3%** FY2010: 15.3% · median town 10.0%

Hatfield's state aid kept pace with both price measures: FY2025 aid was 31.9% above its FY2006 aid grown by Boston-area consumer prices and 17.2% above grown by the government price index.

Gross state aid went from $1.1 million in FY2006 to $2.3 million in FY2025, +104.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+71.4%** $423,000 to $725,000 · all towns +54.0%	All fixed costs, FY2016–25 **+80.4%** $1.1M to $1.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hatfield's health insurance would have been $528,000 in FY2025; it was $725,000, $197,000 above the path. Its fixed costs would have been $1.34 million in FY2025; it was $1.93 million, $595,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hatfield came to $10,000, 3.3% of the $302,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$10,000	3.3%	28.2%
Placed in the town	$10,000	3.3%	42.3%
Everything placed	$10,000	3.3%	45.2%

SCHOOLS

Hatfield's required school contribution is 2.5% of median household income, 210th highest of 351.

Chapter 70 aid, FY2026 **$969,000** to the town's district	Required local contribution **$3.3M** FY2026
Share of household income **2.5%** 210th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Hatfield runs its own school district.

EXPECTED AND ACTUAL

Hatfield received $4.6 million in earmarks placed in the town and competitive grants over ten years, 18% more than the $3.9 million its size, need and institutions predict.

PEERS

Hatfield ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hatfield this town	**31**	**$6,480**	**$1,299**	**$3.01**	**1.78**	**2.5%**
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Lee peer	38	$7,783	$1,292	$21.86	2.91	3.1%
Becket peer	50	$9,450	$3,826	$0	2.09	3.5%
Great Barrington peer	42	$9,461	$2,113	$175	2.92	3.7%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Haverhill

City · Essex County · 67,698 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Essex · Andres X. Vargas 68% of residents
15th Essex · Ryan M. Hamilton 32% of residents

Haverhill is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold
63% of residents
First Essex · Pavel M. Payano
37% of residents

SCHOOL DISTRICTS

Haverhill Public Schools, the city's own district
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Ipswich, Merrimac, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Haverhill scores 58 on the Fairness Index for all state aid and 64 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100

60th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	52	58	64

Rank under other weightings: 46th to 74th.

Stable high: above 55 under every weighting

Haverhill received more than its share of state aid on all four measures; its blended score of 58 stays between 56 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

64 / 100

127th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	56	69	68

Rank under other weightings: 117th to 139th.

Stable high: above 55 under every weighting

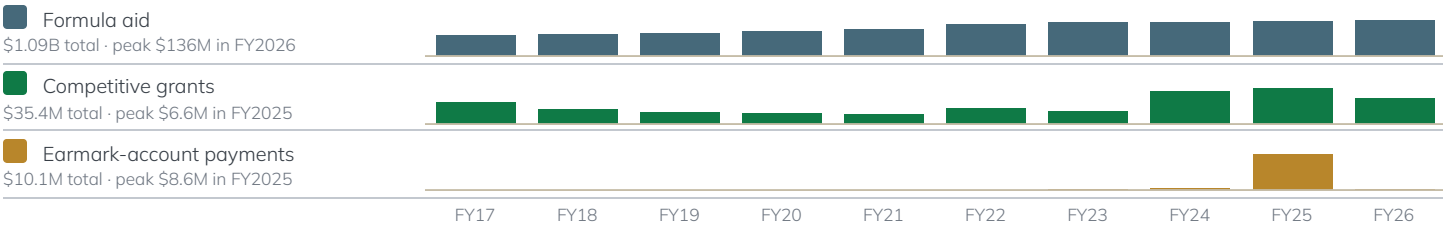
Haverhill received more than its share of discretionary money on all four measures; its blended score of 64 stays between 61 and 66 under every weighting tested.

STATE MONEY, FY2017–FY2026

Haverhill's town government and school districts received $1.09 billion in formula aid and $35.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.09B	**$35.4M**	**$10.1M**
$16,056 per resident (60th of 351) · gross	$523 per resident (134th of 351)	$149 per resident (10th of 351)

Competitive grants to Haverhill were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $64.2 million, are not shown.

EARMARKS

Haverhill received $5.4 million in local earmarks naming the town, $6.6 million placed in the town and $6.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$5.4M	**$6.6M**	**$6.8M**	**Not a member**
$79.79 per resident (73rd of 351)	$98.18 per resident (73rd of 351)	$100 per resident (78th of 351)	35 municipalities had none

Placed in the town: 116 clauses in ten of ten budgets; the most recent in FY2026. $5.3 million came in clauses that name Haverhill; the other $1.4 million went to organizations based in Haverhill, some of which serve a wider area.

Names the town includes $150,000 in clauses that name Haverhill but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $150,000 in two clauses for state facilities located in Haverhill (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$300,000	"the Veterans Northeast Outreach Center, Inc. in Haverhill"	Enacted names the town
FY2019	$300,000	"the Veterans Northeast Outreach Center, Inc., in the city of Haverhill"	Enacted names the town
FY2018	$300,000	"a one time grant to the Haverhill public school district"	Enacted names the town
FY2019	$250,000	"the Greater Lawrence Family Health Center , Inc. for programs to increase access to health care for the medically underserved in the city of Haverhill"	Enacted names the town
FY2017	$250,000	"the early college program administered by Northern Essex Community College"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Haverhill received 2.11 times its proportional share of competitive grant awards.

Local road miles **238.2** 8th of 351 · 3.5 per 1,000 residents (299th of 351)	Town-owned bridges, replacement cost **$7.3M** scored exposure $2.6M · two in poor condition	Road-stream crossings **199** 12th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **33.0 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **67,926** residents plus seasonal	Core infrastructure index **1.11** roads, culverts, dams, coast, flood, energy

Burden index 2.11; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$1,754** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$8,770** statewide $117 · FY2026	New growth per resident **$11,421** FY2017–2025 · 300th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 39.7% of Haverhill's general-fund spending in FY2025, up from 37.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **37.6%** $47.5M of $126M · median town 14.1%	FY2016 **35.0%** $59.6M of $170M · median town 12.2%	FY2025 **39.7%** $102M of $257M · median town 11.5%	Net of state charges, FY2025 **36.1%** FY2010: 28.6% · median town 10.0%

Haverhill's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $11.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Haverhill's state aid kept pace with both price measures: FY2025 aid was 38.8% above its FY2006 aid grown by Boston-area consumer prices and 23.3% above grown by the government price index.

Gross state aid went from $47.5 million in FY2006 to $102 million in FY2025, +115.2% in dollars. Flag: in FY2010, $3.3 million of Haverhill's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+21.3%** $21.5M to $26M · all towns +54.0%	All fixed costs, FY2016–25 **+33.5%** $38.3M to $51.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Haverhill's health insurance would have been $26.8 million in FY2025; it was $26 million, $768,000 below the path. Its fixed costs would have been $47.8 million in FY2025; it was $51.1 million, $3.31 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Haverhill came to $4.9 million, 107.3% of the $4.57 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.9M	107.3%	28.2%
Placed in the town	$6.2M	134.5%	42.3%
Everything placed	$6.3M	137.8%	45.2%

SCHOOLS

Haverhill's required school contribution is 2.7% of median household income, 165th highest of 351.

Chapter 70 aid, FY2026 **$106M** to the town's district	Required local contribution **$62.5M** FY2026
Share of household income **2.7%** 165th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+34%** after inflation

Haverhill runs its own school district and also belongs to Whittier; Haverhill accounts for 67% of that district's foundation budget.

EXPECTED AND ACTUAL

Haverhill received $43 million in earmarks placed in the town and competitive grants over ten years, 75% more than the $24.6 million its size, need and institutions predict.

PEERS

Haverhill ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Haverhill this town	**58**	**$16,056**	**$523**	**$98.18**	**2.11**	**2.7%**
Malden peer	51	$13,164	$195	$58.55	1.64	2.4%
Revere peer	64	$19,109	$328	$31.01	2.70	2.8%
Marlborough peer	53	$13,835	$804	$65.97	1.57	3.4%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Framingham best in class of 30	54	$14,513	$248	$157	0.72	3.1%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Hawley

Town · Franklin County · 277 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Hawlemont Regional School District, shared with Charlemont
Mohawk Trail Regional School District, shared with Ashfield, Buckland, Charlemont, Colrain, Heath, Plainfield and Shelburne

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Hawley scores 59 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

46th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
69	68	37	63

Rank under other weightings: 29th to 90th.

Weighting-dependent: the range crosses the 45–55 band

Hawley received more than its share of state aid on three of four measures; its blended score of 59 stays between 54 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

11th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	91	98

Rank under other weightings: 8th to 13th.

Stable high: above 55 under every weighting

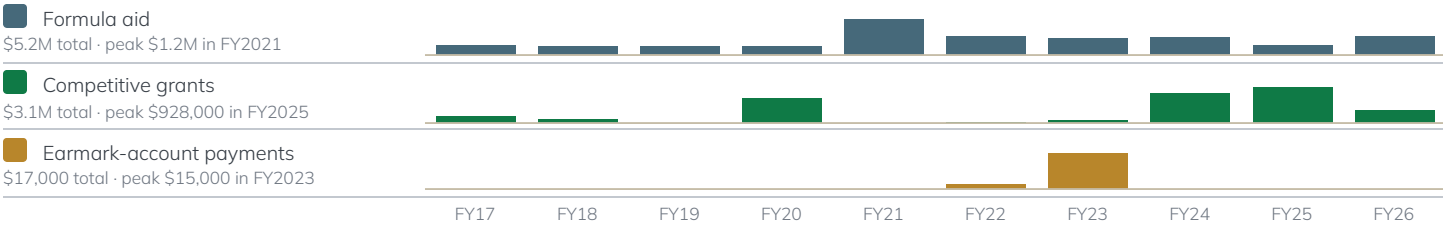
Hawley received more than its share of discretionary money on all four measures; its blended score of 97 stays between 95 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hawley's town government and school districts received $5.2 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$5.2M	**$3.1M**	**$17,000**
$18,811 per resident (36th of 351) · gross	$11,175 per resident (4th of 351)	$60.70 per resident (54th of 351)

Competitive grants to Hawley peaked in FY2025 at $928,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 277 residents, a single payment moves Hawley's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $591,000, are not shown.

EARMARKS

No local earmark was placed in Hawley in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $17,000 in payments to Hawley's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Hawley.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Hawley's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
New Ashford	$0	$0	$0	$0
Middlefield	$0	$0	$0	$0
Monroe	$12,000	$12,000	$12,000	$98.36
Leyden	$100,000	$100,000	$100,000	$157
Florida	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Hawley received 3.05 times its proportional share of competitive grant awards.

Local road miles **41.2** 288th of 351 · 148.8 per 1,000 residents (1st of 351)	Town-owned bridges, replacement cost **$15.7M** scored exposure $4.3M · one in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.5 sq mi** 43% state-owned	Seasonal homes **19%** share of housing units	Peak service population **361** residents plus seasonal	Core infrastructure index **4.81** roads, culverts, dams, coast, flood, energy

Burden index 3.05; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **8,084 acres** 41.4% of land area · FY2026	State-owned land PILOT, FY2026 **$87,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$10.74** statewide $117 · FY2026	New growth per resident **$21,564** FY2017–2025 · 167th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.7% of Hawley's general-fund spending in FY2025, down from 7.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.9%** $86,000 of $1.1M · median town 14.1%	FY2016 **9.9%** $145,000 of $1.5M · median town 12.2%	FY2025 **7.7%** $166,000 of $2.2M · median town 11.5%	Net of state charges, FY2025 **7.6%** FY2010: 7.1% · median town 10.0%

Hawley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $96,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hawley's state aid kept pace with both price measures: FY2025 aid was 24.5% above its FY2006 aid grown by Boston-area consumer prices and 10.6% above grown by the government price index.

Gross state aid went from $86,000 in FY2006 to $166,000 in FY2025, +93.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+101.3%** $14,000 to $28,000 · all towns +54.0%	All fixed costs, FY2016–25 **+90.3%** $60,000 to $114,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hawley's health insurance would have been $18,000 in FY2025; it was $28,000, $11,000 above the path. Its fixed costs would have been $75,000 in FY2025; it was $114,000, $39,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2018 (+47%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hawley came to $0, 0.0% of the $14,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Hawley's required school contribution is 2.9% of median household income, 104th highest of 351.

Chapter 70 aid, FY2026 **$111,000** attributed to the town	Required local contribution **$293,000** FY2026
Share of household income **2.9%** 104th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–30%** after inflation

Hawley has no school district of its own. Its pupils attend Hawley, Hawlemont and Mohawk Trail; Hawley accounts for 100%, 13% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide. Hawley had 23 resident pupils in FY2026, so per-pupil changes swing from year to year.

EXPECTED AND ACTUAL

Hawley received $3.1 million in earmarks placed in the town and competitive grants over ten years, about the $3 million its size, need and institutions predict.

PEERS

Hawley is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hawley this town	**59**	**$18,811**	**$11,175**	**$0**	**3.05**	**2.9%**
New Ashford peer · lowest in class of 30	53	$13,073	$2,924	$0	0.02	0.9%
Middlefield peer	48	$13,430	$2,926	$0	0.24	1.9%
Monroe peer	63	$20,140	$16,477	$98.36	4.23	not available
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Heath

Town · Franklin County · 765 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mohawk Trail Regional School District, shared with Ashfield, Buckland, Charlemont, Colrain, Hawley, Plainfield and Shelburne

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Heath scores 70 on the Fairness Index for all state aid and 98 for discretionary money. Fifty is a fair share.

ALL STATE AID

70 / 100

13th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	69	63	75

Rank under other weightings: 10th to 17th.

Stable high: above 55 under every weighting

Heath received more than its share of state aid on all four measures; its blended score of 70 stays between 67 and 72 under every weighting tested.

DISCRETIONARY MONEY ONLY

98 / 100

4th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	96	98

Rank under other weightings: 4th to 7th.

Stable high: above 55 under every weighting

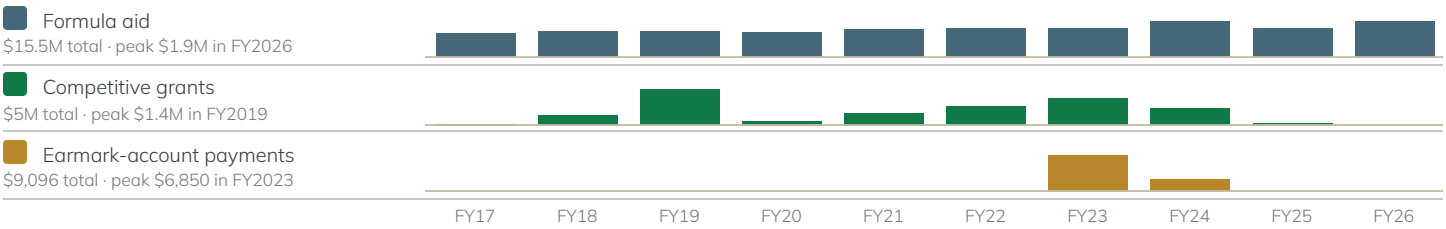
Heath received more than its share of discretionary money on all four measures; its blended score of 98 stays between 97 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Heath's town government and school districts received $15.5 million in formula aid and $5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$15.5M	**$5M**	**$9,096**
$20,313 per resident (24th of 351) · gross	$6,568 per resident (9th of 351)	$11.89 per resident (248th of 351)

Competitive grants to Heath peaked in FY2019 at $1.4 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 765 residents, a single payment moves Heath's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

Heath received $50,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	**$50,000**	**$50,000**	**Not a member**
$65.36 per resident (97th of 351)	$65.36 per resident (126th of 351)	$65.36 per resident (132nd of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2024. Every one names Heath directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$50,000	"improvements to the Heath fairgrounds by the Heath Agricultural Society, Inc"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Heath received 84% of its proportional share of competitive grant awards.

Local road miles **52.0** 243rd of 351 · 68.0 per 1,000 residents (11th of 351)	Town-owned bridges, replacement cost **$5.8M** scored exposure $1.5M · one in poor condition	Road-stream crossings **48** 270th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **24.9 sq mi** 7% state-owned	Seasonal homes **38%** share of housing units	Peak service population **1,287** residents plus seasonal	Core infrastructure index **0.33** roads, culverts, dams, coast, flood, energy

Burden index 0.84; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **823 acres** 5.2% of land area · FY2026	State-owned land PILOT, FY2026 **$6,985** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$8.48** statewide $117 · FY2026	New growth per resident **$11,363** FY2017–2025 · 301st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

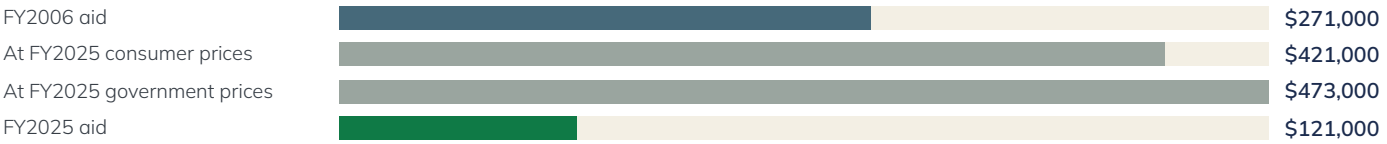
State aid covered 4.3% of Heath's general-fund spending in FY2025, down from 15.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.0%** $271,000 of $1.8M · median town 14.1%	FY2016 **4.4%** $88,000 of $2M · median town 12.2%	FY2025 **4.3%** $121,000 of $2.8M · median town 11.5%	Net of state charges, FY2025 **4.2%** FY2010: 2.6% · median town 10.0%

Heath's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Heath's state aid did not keep pace with either price measure: FY2025 aid was 71.2% below its FY2006 aid grown by Boston-area consumer prices and 74.4% below grown by the government price index.



Gross state aid went from $271,000 in FY2006 to $121,000 in FY2025, –55.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–0.4%** $61,000 to $61,000 · all towns +54.0%	All fixed costs, FY2016–25 **+50.5%** $156,000 to $235,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Heath's health insurance would have been $76,000 in FY2025; it was $61,000, $15,000 below the path. Its fixed costs would have been $195,000 in FY2025; it was $235,000, $40,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (–34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Heath's reported health insurance fell from $61,000 in FY2016 to $61,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	no increase	28.2%
Placed in the town	$50,000	no increase	42.3%
Everything placed	$50,000	no increase	45.2%

SCHOOLS

Heath's required school contribution is 1.5% of

EXPECTED AND ACTUAL

Heath received $5.1 million in earmarks placed in the town and competitive grants over ten years, 52%

median household income, 336th highest of 351.

Chapter 70 aid, FY2026 **$1M** attributed to the town	Required local contribution **$534,000** FY2026
Share of household income **1.5%** 336th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+13%** after inflation

Heath has no school district of its own. Its pupils attend Mohawk Trail and Franklin County; Heath accounts for 9% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

more than the $3.3 million its size, need and institutions predict.

PEERS

Heath ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Heath this town	**70**	**$20,313**	**$6,568**	**$65.36**	**0.84**	**1.5%**
Warwick peer	52	$14,769	$2,887	$64.43	2.79	1.7%
Florida peer · lowest in class of 30	64	$19,543	$1,744	$0	0.14	3.2%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Hingham

Town · Plymouth County · 24,283 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Plymouth · Joan Meschino	**First Plymouth and Norfolk** · Patrick M. O'Connor	**Hingham Public Schools**, the town's own district	Metropolitan Area Planning Council

FAIRNESS INDEX

Hingham scores 30 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

311th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	43	22	27

Rank under other weightings: 290th to 335th.

Stable low: below 45 under every weighting

Hingham received less than its share of state aid on all four measures; its blended score of 29 stays between 26 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

324th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
14	27	13	15

Rank under other weightings: 314th to 331st.

Stable low: below 45 under every weighting

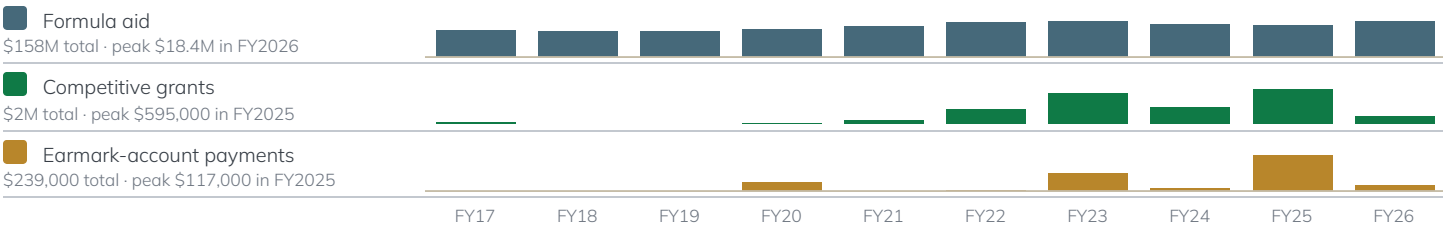
Hingham received less than its share of discretionary money on all four measures; its blended score of 17 stays between 15 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hingham's town government and school districts received $158 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$158M	**$2M**	**$239,000**
$6,498 per resident (318th of 351) · gross	$83.05 per resident (336th of 351)	$9.83 per resident (261st of 351)

Competitive grants to Hingham peaked in FY2025 at $595,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.9 million, are not shown.

EARMARKS

Hingham received $1.2 million in local earmarks naming the town, $2.2 million placed in the town and $2.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$2.2M**	**$2.3M**	**Not a member**
$49.99 per resident (149th of 351)	$90.15 per resident (85th of 351)	$94.26 per resident (89th of 351)	35 municipalities had none

Placed in the town: 25 clauses in nine of ten budgets; the most recent in FY2026. $1.1 million came in clauses that name Hingham; the other $1.1 million went to organizations based in Hingham, some of which serve a wider area.

Names the town includes $100,000 in clauses that name Hingham but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $100,000 in one clause for state facilities located in Hingham (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$500,000	"St. John the Evangelist Church in the town of Hingham to support the Free Period program to provide free feminine hygiene products to those in need"	Enacted names the town
FY2025	$450,000	"Drug Story Theater, Inc. to support substance abuse education performances and forums throughout the commonwealth"	Enacted recipient based here
FY2024	$450,000	"Drug Story Theater, Inc., to support substance abuse education performances and forums throughout the commonwealth"	Enacted recipient based here
FY2017	$112,000	"the town of Hingham public schools' emergency response coordination through phase 3 of enhanced security planning, including providing staff safety…"	Enacted names the town
FY2025	$100,000	"the Hingham Sports Partnership, Inc. to partially fund the construction of a teen fitness and wellness facility in the town of Hingham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hingham received 24% of its proportional share of competitive grant awards.

Local road miles **111.9** 74th of 351 · 4.6 per 1,000 residents (258th of 351)	Town-owned bridges, replacement cost **$1.9M** scored exposure $419,000 · none in poor condition	Road-stream crossings **92** 136th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.2 sq mi** 16% state-owned	Seasonal homes **2%** share of housing units	Peak service population **24,663** residents plus seasonal	Core infrastructure index **0.59** roads, culverts, dams, coast, flood, energy

Burden index 0.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **16 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$7,123** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$434** statewide $117 · FY2026	New growth per resident **$30,061** FY2017–2025 · 106th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.0% of Hingham's general-fund spending in FY2025, down from 12.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.8%** $8M of $62.1M · median town 14.1%	FY2016 **10.6%** $10.2M of $96M · median town 12.2%	FY2025 **8.0%** $11.2M of $140M · median town 11.5%	Net of state charges, FY2025 **7.2%** FY2010: 10.3% · median town 10.0%

Hingham's state aid did not keep pace with either price measure: FY2025 aid was 9.8% below its FY2006 aid grown by Boston-area consumer prices and 19.8% below grown by the government price index.

Gross state aid went from $8 million in FY2006 to $11.2 million in FY2025, +39.9% in dollars. Flag: in FY2010, $2 million of Hingham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+3.6%** $7.1M to $7.4M · all towns +54.0%	All fixed costs, FY2016–25 **+43.4%** $12.9M to $18.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hingham's health insurance would have been $8.86 million in FY2025; it was $7.35 million, $1.51 million below the path. Its fixed costs would have been $16.1 million in FY2025; it was $18.4 million, $2.38 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hingham came to $1.2 million, 4.7 times the $255,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$1.2M	4.7 times	28.2%
Placed in the town	$2.2M	8.5 times	42.3%
Everything placed	$2.3M	8.9 times	45.2%

SCHOOLS

Hingham's required school contribution is 2.2% of median household income, 287th highest of 351.

Chapter 70 aid, FY2026 **$9.4M** to the town's district	Required local contribution **$38.5M** FY2026
Share of household income **2.2%** 287th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+24%** after inflation

Hingham runs its own school district.

EXPECTED AND ACTUAL

Hingham received $5 million in earmarks placed in the town and competitive grants over ten years, 66% of the $7.6 million its size, need and institutions predict.

PEERS

Hingham ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hingham this town	**30**	**$6,498**	**$83.05**	**$90.15**	**0.24**	**2.2%**
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Hinsdale

Town · Berkshire County · 1,859 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Berkshire · John Barrett, III	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Central Berkshire Regional School District**, shared with Becket, Cummington, Dalton, Peru, Washington and Windsor	Berkshire Regional Planning Commission

FAIRNESS INDEX

Hinsdale scores 44 on the Fairness Index for all state aid and 88 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

169th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	50	43	38

Rank under other weightings: 159th to 185th.

Weighting-dependent: the range crosses the 45–55 band

Hinsdale received less than its share of state aid on three of four measures; its blended score of 44 stays between 42 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

88 / 100

48th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
89	91	84	86

Rank under other weightings: 46th to 53rd.

Stable high: above 55 under every weighting

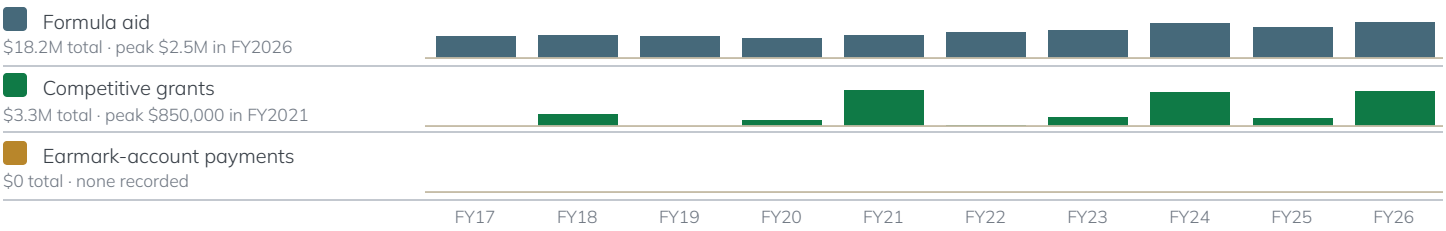
Hinsdale received more than its share of discretionary money on all four measures; its blended score of 88 stays between 86 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hinsdale's town government and school districts received $18.2 million in formula aid and $3.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$18.2M	**$3.3M**	**$0**
$9,786 per resident (186th of 351) · gross	$1,790 per resident (51st of 351)	$0 per resident (339th of 351)

Competitive grants to Hinsdale peaked in FY2021 at $850,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.9 million, are not shown.

EARMARKS

No local earmark was placed in Hinsdale in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Hinsdale's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Whately	$43,000	$43,000	$43,000	$28.91
Richmond	$0	$0	$0	$0
West Stockbridge	$0	$0	$0	$0
Plympton	$335,000	$335,000	$335,000	$114
Blandford	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Hinsdale received 2.54 times its proportional share of competitive grant awards.

Local road miles **35.5** 310th of 351 · 19.1 per 1,000 residents (62nd of 351)	Town-owned bridges, replacement cost **$10.2M** scored exposure $5.4M · three in poor condition	Road-stream crossings **72** 191st of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **20.7 sq mi** 17% state-owned	Seasonal homes **13%** share of housing units	Peak service population **2,173** residents plus seasonal	Core infrastructure index **4.81** roads, culverts, dams, coast, flood, energy

Burden index 2.54; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,148 acres** 16.2% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$25.35** statewide $117 · FY2026	New growth per resident **$32,486** FY2017–2025 · 94th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.1% of Hinsdale's general-fund spending in FY2025, down from 10.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.8%** $319,000 of $2.9M · median town 14.1%	FY2016 **7.7%** $356,000 of $4.6M · median town 12.2%	FY2025 **7.1%** $462,000 of $6.5M · median town 11.5%	Net of state charges, FY2025 **6.7%** FY2010: 9.2% · median town 10.0%

Hinsdale's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $804,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hinsdale's state aid did not keep pace with either price measure: FY2025 aid was 6.7% below its FY2006 aid grown by Boston-area consumer prices and 17.1% below grown by the government price index.

Gross state aid went from $319,000 in FY2006 to $462,000 in FY2025, +44.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+120.4%** $91,000 to $200,000 · all towns +54.0%	All fixed costs, FY2016–25 **+99.2%** $257,000 to $513,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hinsdale's health insurance would have been $113,000 in FY2025; it was $200,000, $86,000 above the path. Its fixed costs would have been $321,000 in FY2025; it was $513,000, $191,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+44%) and FY2023 (+71%); fixed costs changed by more than 30% in one year in FY2023 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hinsdale came to $0, 0.0% of the $109,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Hinsdale's required school contribution is 3.6% of median household income, 16th highest of 351.

Chapter 70 aid, FY2026 **$1M** attributed to the town	Required local contribution **$2.4M** FY2026
Share of household income **3.6%** 16th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Hinsdale has no school district of its own. Its pupils attend Hinsdale and Central Berkshire; Hinsdale accounts for 100% and 14% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Hinsdale received $3.4 million in earmarks placed in the town and competitive grants over ten years, 88% of the $3.9 million its size, need and institutions predict.

PEERS

Hinsdale is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hinsdale this town	**44**	**$9,786**	**$1,790**	**$0**	**2.54**	**3.6%**
Whately peer	45	$9,968	$1,484	$28.91	1.02	2.4%
Richmond peer · lowest in class of 30	40	$8,072	$776	$0	0.19	2.2%
West Stockbridge peer	43	$9,304	$478	$0	0.46	2.4%
Plympton peer	35	$9,237	$274	$114	0.71	3.4%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Holbrook

Town · Norfolk County · 11,380 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Norfolk · Mark J. Cusack 50% of residents
3rd Norfolk · Ronald Mariano 50% of residents

Holbrook is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk and Plymouth · John F. Keenan

SCHOOL DISTRICTS

Holbrook Public Schools, the town's own district
Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Dedham, Milton, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Holbrook scores 62 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

62 / 100

34th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	62	63	60

Rank under other weightings: 27th to 43rd.

Stable high: above 55 under every weighting

Holbrook received more than its share of state aid on all four measures; its blended score of 62 stays between 62 and 63 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

187th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	48	57	46

Rank under other weightings: 172nd to 198th.

Near fair: between 45 and 55 under every weighting

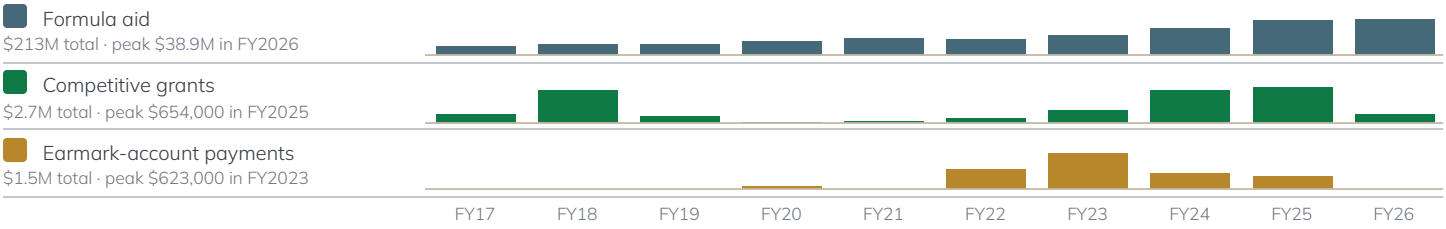
Holbrook received less than its share of discretionary money on three of four measures; its blended score of 50 stays between 48 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Holbrook's town government and school districts received $213 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$213M	$2.7M	$1.5M
$18,686 per resident (39th of 351) · gross	$238 per resident (229th of 351)	$135 per resident (15th of 351)

Competitive grants to Holbrook peaked in FY2025 at $654,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.9 million, are not shown.

EARMARKS

Holbrook received $2.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.1M	$2.1M	$2.1M	Not a member
$187 per resident (7th of 351)	$187 per resident (11th of 351)	$187 per resident (19th of 351)	35 municipalities had none

Placed in the town: 29 clauses in eight of ten budgets; the most recent in FY2026. Every one names Holbrook directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"the Sean Joyce athletics fields in the town of Holbrook"	Enacted names the town
FY2025	$200,000	"the Sean Joyce athletic fields in the town of Holbrook"	Enacted names the town
FY2024	$200,000	"the Sean Joyce athletic fields in the town of Holbrook"	Enacted names the town
FY2026	$100,000	"the Holbrook Regional Emergency Communication Center"	Enacted names the town
FY2025	$100,000	"the Holbrook regional emergency communications center"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Holbrook received 92% of its proportional share of competitive grant awards.

Local road miles **38.6** 298th of 351 · 3.4 per 1,000 residents (304th of 351)	Town-owned bridges, replacement cost **$2.2M** scored exposure $1.5M · one in poor condition	Road-stream crossings **27** 320th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **7.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **11,380** residents plus seasonal	Core infrastructure index **2.18** roads, culverts, dams, coast, flood, energy

Burden index 0.92; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$14,284** FY2017–2025 · 263rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 27.4% of Holbrook's general-fund spending in FY2025, up from 22.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **22.3%** $5.9M of $26.5M · median town 14.1%	FY2016 **21.1%** $7.2M of $34.1M · median town 12.2%	FY2025 **27.4%** $13.4M of $48.8M · median town 11.5%	Net of state charges, FY2025 **24.4%** FY2010: 20.9% · median town 10.0%

Holbrook's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Holbrook's state aid kept pace with both price measures: FY2025 aid was 45.7% above its FY2006 aid grown by Boston-area consumer prices and 29.5% above grown by the government price index.

Gross state aid went from $5.9 million in FY2006 to $13.4 million in FY2025, +126.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.2%** $4.5M to $6M · all towns +54.0%	All fixed costs, FY2016–25 **+47.0%** $7M to $10.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Holbrook's health insurance would have been $5.63 million in FY2025; it was $5.96 million, $331,000 above the path. Its fixed costs would have been $8.79 million in FY2025; it was $10.3 million, $1.56 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Holbrook came to $1.8 million, 120.8% of the $1.45 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.8M	120.8%	28.2%
Placed in the town	$1.8M	120.8%	42.3%
Everything placed	$1.8M	120.8%	45.2%

SCHOOLS

Holbrook's required school contribution is 2.4% of median household income, 267th highest of 351.

Chapter 70 aid, FY2026 **$14.3M** to the town's district	Required local contribution **$11.9M** FY2026
Share of household income **2.4%** 267th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+45%** after inflation

Holbrook runs its own school district and also belongs to Blue Hills and Norfolk County; Holbrook accounts for 13% and 3% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Holbrook received $5 million in earmarks placed in the town and competitive grants over ten years, 23% more than the $4 million its size, need and institutions predict.

PEERS

Holbrook ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Holbrook this town	**62**	**$18,686**	**$238**	**$187**	**0.92**	**2.4%**
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Townsend peer	54	$15,988	$300	$29.35	0.75	2.3%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Holden

Town · Worcester County · 20,064 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Worcester · Kimberly N. Ferguson

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Wachusett Regional School District, shared with Paxton, Princeton, Rutland and Sterling

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Hubbardston and nine others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Holden scores 49 on the Fairness Index for all state aid and 14 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

128th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	59	43	46

Rank under other weightings: 110th to 145th.

Near fair: between 45 and 55 under every weighting

Holden received less than its share of state aid on two of four measures; its blended score of 49 stays between 46 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

14 / 100

336th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
12	16	16	10

Rank under other weightings: 334th to 339th.

Stable low: below 45 under every weighting

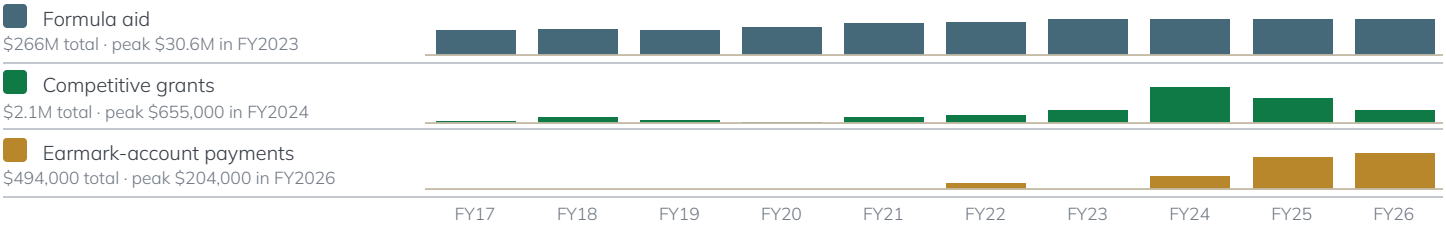
Holden received less than its share of discretionary money on all four measures; its blended score of 14 stays between 12 and 15 under every weighting tested.

STATE MONEY, FY2017–FY2026

Holden's town government and school districts received $266 million in formula aid and $2.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$266M	$2.1M	$494,000
$13,276 per resident (106th of 351) · gross	$103 per resident (323rd of 351)	$24.62 per resident (177th of 351)

Competitive grants to Holden peaked in FY2024 at $655,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4 million, are not shown.

EARMARKS

Holden received $315,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$315,000	$315,000	$315,000	Not a member
$15.70 per resident (278th of 351)	$15.70 per resident (286th of 351)	$15.70 per resident (287th of 351)	35 municipalities had none

Placed in the town: five clauses in three of ten budgets; the most recent in FY2026. Every one names Holden directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"new trailers and bays for the fire department substation in the town of Holden"	Enacted names the town
FY2026	$75,000	"the purpose of a design and engineering study for the revitalization of Eagle Lake recreation area in the town of Holden"	Enacted names the town
FY2022	$65,000	"the town of Holden for the removal of hazardous materials from the former electroplating manufacturing facility, located at 156 Princeton street, and..."	Enacted names the town
FY2024	$50,000	"a feasibility study at Eagle lake recreation area in the town of Holden"	Enacted names the town
FY2024	$25,000	"an inclusive playground in Holden"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Holden received 39% of its proportional share of competitive grant awards.

Local road miles **120.7** 62nd of 351 · 6.0 per 1,000 residents (189th of 351)	Town-owned bridges, replacement cost **$19M** scored exposure $4.4M · none in poor condition	Road-stream crossings **150** 39th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **35.1 sq mi** 19% state-owned	Seasonal homes **0%** share of housing units	Peak service population **20,064** residents plus seasonal	Core infrastructure index **0.20** roads, culverts, dams, coast, flood, energy

Burden index 0.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **412 acres** 1.8% of land area · FY2026	State-owned land PILOT, FY2026 **$179,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$435** statewide $117 · FY2026	New growth per resident **$18,532** FY2017–2025 · 208th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.2% of Holden's general-fund spending in FY2025, down from 5.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.9%** $1.9M of $32.1M · median town 14.1%	FY2016 **8.7%** $3.7M of $42.7M · median town 12.2%	FY2025 **4.2%** $2.7M of $63.5M · median town 11.5%	Net of state charges, FY2025 **4.0%** FY2010: 10.0% · median town 10.0%

Holden's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $19.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Holden's state aid did not keep pace with either price measure: FY2025 aid was 8.5% below its FY2006 aid grown by Boston-area consumer prices and 18.7% below grown by the government price index.

Gross state aid went from $1.9 million in FY2006 to $2.7 million in FY2025, +41.8% in dollars. Flag: in FY2010, $1.9 million of Holden's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.6%** $1.2M to $1.8M · all towns +54.0%	All fixed costs, FY2016–25 **+77.1%** $2.9M to $5.1M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Holden's health insurance would have been $1.49 million in FY2025; it was $1.84 million, $354,000 above the path. Its fixed costs would have been $3.59 million in FY2025; it was $5.09 million, $1.50 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Holden came to $140,000, 21.5% of the $651,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$140,000	21.5%	28.2%
Placed in the town	$140,000	21.5%	42.3%
Everything placed	$140,000	21.5%	45.2%

SCHOOLS

Holden's required school contribution is 2.6% of median household income, 191st highest of 351.

Chapter 70 aid, FY2026 **$19.4M** attributed to the town	Required local contribution **$26.4M** FY2026
Share of household income **2.6%** 191st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Holden has no school district of its own. Its pupils attend Holden, Wachusett and Montachusett; Holden accounts for 100%, 47% and 11% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Holden received $3 million in earmarks placed in the town and competitive grants over ten years, 45% of the $6.6 million its size, need and institutions predict.

PEERS

Holden ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Holden this town	**49**	**$13,276**	**$103**	**$15.70**	**0.39**	**2.6%**
Tewksbury peer	38	$8,861	$181	$57.89	0.24	2.8%
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Uxbridge peer	48	$11,199	$436	$15.55	1.22	2.8%
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Shrewsbury peer	36	$8,418	$158	$25.41	0.74	3.1%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Holland

Town · Hampden County · 2,583 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Holland Public Schools, the town's own district

Tantasqua Regional School District, shared with Brimfield, Brookfield, Sturbridge and Wales

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Holland scores 45 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

165th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	44	47	42

Rank under other weightings: 155th to 183rd.

Weighting-dependent: the range crosses the 45–55 band

Holland received less than its share of state aid on all four measures; its blended score of 45 stays between 44 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

73rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
82	81	78	80

Rank under other weightings: 68th to 76th.

Stable high: above 55 under every weighting

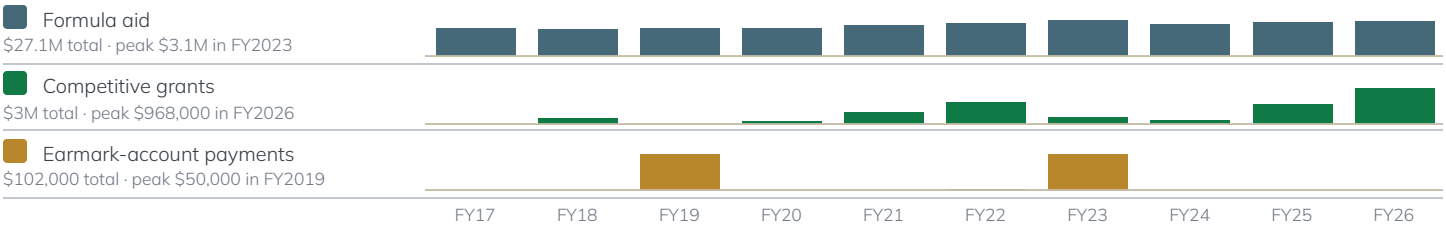
Holland received more than its share of discretionary money on all four measures; its blended score of 81 stays between 80 and 81 under every weighting tested.

STATE MONEY, FY2017–FY2026

Holland's town government and school districts received $27.1 million in formula aid and $3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$27.1M	**$3M**	**$102,000**
$10,480 per resident (168th of 351) · gross	$1,150 per resident (70th of 351)	$39.38 per resident (112th of 351)

Competitive grants to Holland peaked in FY2026 at $968,000, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $906,000, are not shown.

EARMARKS

Holland received $100,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$100,000	**$100,000**	**$100,000**	**Not a member**
$38.71 per resident (196th of 351)	$38.71 per resident (209th of 351)	$38.71 per resident (212th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2023. Every one names Holland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$50,000	"the town of Holland for public safety upgrades"	Enacted names the town
FY2019	$50,000	"the acquisition of land known as the Sichol property in Holland"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Holland received 46% of its proportional share of competitive grant awards.

Local road miles **34.6** 316th of 351 · 13.4 per 1,000 residents (77th of 351)	Town-owned bridges, replacement cost **$4.2M** scored exposure $1M · one in poor condition	Road-stream crossings **52** 254th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **12.3 sq mi** 7% state-owned	Seasonal homes **17%** share of housing units	Peak service population **3,163** residents plus seasonal	Core infrastructure index **0.24** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **249 acres** 3.2% of land area · FY2026	State-owned land PILOT, FY2026 **$6,795** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$27.24** statewide $117 · FY2026	New growth per resident **$11,882** FY2017–2025 · 296th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.1% of Holland's general-fund spending in FY2025, up from 16.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **16.6%** $898,000 of $5.4M · median town 14.1%	FY2016 **22.4%** $1.4M of $6.1M · median town 12.2%	FY2025 **17.1%** $1.5M of $8.9M · median town 11.5%	Net of state charges, FY2025 **16.3%** FY2010: 21.8% · median town 10.0%

Holland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $728,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Holland's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 9.3% above its FY2006 aid grown by Boston-area consumer prices and 2.8% below grown by the government price index.

Gross state aid went from $898,000 in FY2006 to $1.5 million in FY2025, +69.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+15.3%** $325,000 to $375,000 · all towns +54.0%	All fixed costs, FY2016–25 **+49.1%** $666,000 to $994,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Holland's health insurance would have been $406,000 in FY2025; it was $375,000, $31,000 below the path. Its fixed costs would have been $832,000 in FY2025; it was $994,000, $161,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Holland came to $100,000, 2.0 times the $50,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$100,000	2.0 times	28.2%
Placed in the town	$100,000	2.0 times	42.3%
Everything placed	$100,000	2.0 times	45.2%

SCHOOLS

Holland's required school contribution is 2.7% of median household income, 160th highest of 351.

Chapter 70 aid, FY2026 **$1.9M** to the town's district	Required local contribution **$2.9M** FY2026
Share of household income **2.7%** 160th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

EXPECTED AND ACTUAL

Holland received $3.1 million in earmarks placed in the town and competitive grants over ten years, 23% more than the $2.5 million its size, need and institutions predict.

Holland runs its own district for some grades and belongs to Tantasqua for others; Holland accounts for 9% of that district's foundation budget.

PEERS

Holland ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Holland this town	**45**	**$10,480**	**$1,150**	**$38.71**	**0.46**	**2.7%**
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Westhampton peer · lowest in class of 30	42	$11,067	$887	$0	0.62	3.3%
Lanesborough peer	40	$10,886	$484	$0	1.16	2.8%
Deerfield peer	44	$9,461	$1,195	$6.46	2.83	2.4%
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Holliston

Town · Middlesex County · 15,094 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Middlesex · James C. Arena-DeRosa

STATE SENATE

Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS

Holliston Public Schools, the town's own district

South Middlesex Regional Vocational Technical School District, vocational, shared with Ashland, Framingham, Hopkinton and Natick

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Holliston scores 41 on the Fairness Index for all state aid and 42 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

206th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	58	31	34

Rank under other weightings: 169th to 237th.

Weighting-dependent: the range crosses the 45–55 band

Holliston received less than its share of state aid on three of four measures; its blended score of 41 stays between 36 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

42 / 100

214th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	56	40	33

Rank under other weightings: 203rd to 226th.

Weighting-dependent: the range crosses the 45–55 band

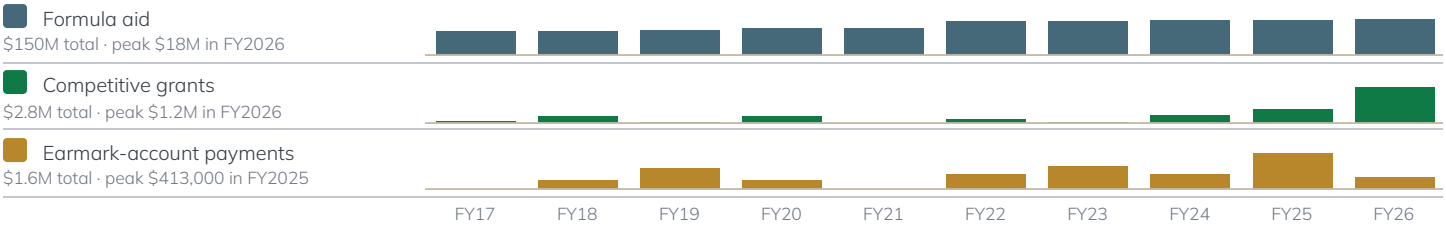
Holliston received less than its share of discretionary money on three of four measures; its blended score of 42 stays between 38 and 46 under every weighting tested.

STATE MONEY, FY2017–FY2026

Holliston's town government and school districts received $150 million in formula aid and $2.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$150M	**$2.8M**	**$1.6M**
$9,911 per resident (181st of 351) · gross	$189 per resident (258th of 351)	$106 per resident (19th of 351)

Competitive grants to Holliston peaked in FY2026 at $1.2 million, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.9 million, are not shown.

EARMARKS

Holliston received $2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2M	**$2M**	**$2M**	**Not a member**
$129 per resident (25th of 351)	$129 per resident (42nd of 351)	$129 per resident (47th of 351)	35 municipalities had none

Placed in the town: 29 clauses in nine of ten budgets; the most recent in FY2026. Every one names Holliston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$200,000	"the Holliston school substance abuse prevention program"	Enacted names the town
FY2019	$150,000	"the Holliston School Substance Abuse Prevention program"	Enacted names the town
FY2024	$125,000	"the Holliston public schools for costs associated with the purchase of a multi-function school activity bus"	Enacted names the town
FY2026	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address…"	Enacted names the town
FY2025	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Holliston received 85% of its proportional share of competitive grant awards.

Local road miles **88.4** 124th of 351 · 5.9 per 1,000 residents (197th of 351)	Town-owned bridges, replacement cost **$8.9M** scored exposure $2M · one in poor condition	Road-stream crossings **123** 72nd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **18.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,094** residents plus seasonal	Core infrastructure index **1.43** roads, culverts, dams, coast, flood, energy

Burden index 0.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$4,007** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,206** statewide $117 · FY2026	New growth per resident **$26,636** FY2017–2025 · 129th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.1% of Holliston's general-fund spending in FY2025, down from 25.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **25.8%** $11.1M of $43M · median town 14.1%	FY2016 **22.3%** $12M of $54M · median town 12.2%	FY2025 **17.1%** $12M of $70.4M · median town 11.5%	Net of state charges, FY2025 **16.1%** FY2010: 20.5% · median town 10.0%

Holliston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $465,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Holliston's state aid did not keep pace with either price measure: FY2025 aid was 29.9% below its FY2006 aid grown by Boston-area consumer prices and 37.7% below grown by the government price index.

Gross state aid went from $11.1 million in FY2006 to $12 million in FY2025, +8.7% in dollars. Flag: in FY2010, $2.3 million of Holliston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+10.4%** $4.9M to $5.4M · all towns +54.0%	All fixed costs, FY2016–25 **+48.6%** $6.6M to $9.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Holliston's health insurance would have been $6.11 million in FY2025; it was $5.41 million, $708,000 below the path. Its fixed costs would have been $8.20 million in FY2025; it was $9.76 million, $1.56 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Holliston came to $1.8 million, 3.6 times the $510,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.8M	3.6 times	28.2%
Placed in the town	$1.8M	3.6 times	42.3%
Everything placed	$1.8M	3.6 times	45.2%

SCHOOLS

Holliston's required school contribution is 3.1% of median household income, 57th highest of 351.

Chapter 70 aid, FY2026 **$9.9M** to the town's district	Required local contribution **$27.9M** FY2026
Share of household income **3.1%** 57th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Holliston runs its own school district and also belongs to South Middlesex; Holliston accounts for 8% of that district's foundation budget.

EXPECTED AND ACTUAL

Holliston received $4.8 million in earmarks placed in the town and competitive grants over ten years, 94% of the $5.1 million its size, need and institutions predict.

PEERS

Holliston ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Holliston this town	**41**	**$9,911**	**$189**	**$129**	**0.85**	**3.1%**
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Westford peer	45	$10,874	$400	$41.76	1.34	2.9%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Medway peer · best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Norfolk peer	38	$8,835	$264	$53.87	0.87	2.7%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Holyoke

City · Hampden County · 37,813 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
5th Hampden · Patricia A. Duffy	**Hampden and Hampshire** · John C. Velis	**Holyoke Public Schools**, the city's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

Holyoke scores 78 on the Fairness Index for all state aid and 74 for discretionary money. Fifty is a fair share.

ALL STATE AID

78 / 100

4th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
80	71	77	84

Rank under other weightings: 4th to 5th.

Stable high: above 55 under every weighting

Holyoke received more than its share of state aid on all four measures; its blended score of 78 stays between 76 and 80 under every weighting tested.

DISCRETIONARY MONEY ONLY

74 / 100

90th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	66	75	80

Rank under other weightings: 87th to 101st.

Stable high: above 55 under every weighting

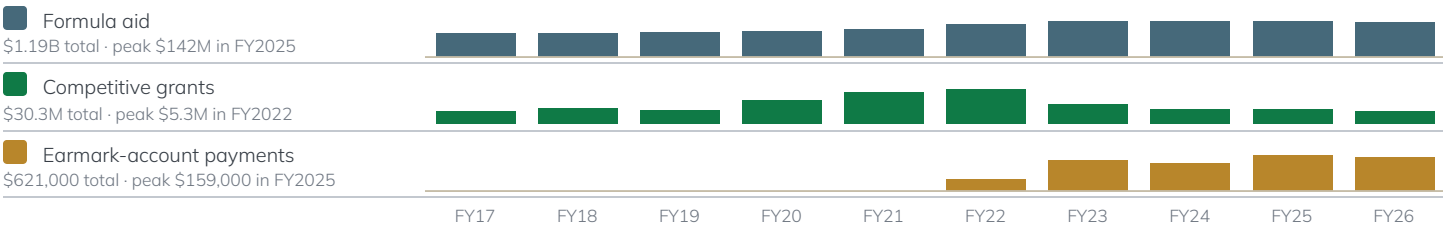
Holyoke received more than its share of discretionary money on all four measures; its blended score of 74 stays between 72 and 76 under every weighting tested.

STATE MONEY, FY2017–FY2026

Holyoke's town government and school districts received $1.19 billion in formula aid and $30.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.19B	**$30.3M**	**$621,000**
$31,543 per resident (5th of 351) · gross	$801 per resident (94th of 351)	$16.42 per resident (223rd of 351)

Competitive grants to Holyoke were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $54.2 million, are not shown.

EARMARKS

Holyoke received $3.3 million in local earmarks naming the town, $3.5 million placed in the town and $4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.3M	**$3.5M**	**$4M**	**Not a member**
$86.48 per resident (64th of 351)	$93.22 per resident (81st of 351)	$105 per resident (71st of 351)	35 municipalities had none

Placed in the town: 56 clauses in ten of ten budgets; the most recent in FY2026. $2.8 million came in clauses that name Holyoke; the other $700,000 went to organizations based in Holyoke, some of which serve a wider area.

Names the town includes $445,000 in clauses that name Holyoke but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $445,000 in seven clauses for state facilities located in Holyoke (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$250,000	"the Greater Holyoke Chamber of Commerce, Inc. for building restorations and upgrades in the city of Holyoke"	Enacted names the town
FY2022	$200,000	"the continued operation of an ombudsman's office at the Soldiers' Home in Holyoke to act as an independent, impartial and confidential resource for..."	Enacted names the town
FY2021	$200,000	"the creation of an ombudsman's office at the Soldiers' Home in Holyoke to act as an independent, impartial and confidential resource for the community"	Enacted names the town
FY2021	$200,000	"the Soldiers' Home in Holyoke to ensure the best quality of resources for patients and staff"	Enacted names the town
FY2019	$200,000	"support the operation of the Eureka program in the Holyoke, Lynn and Worcester chapters of Girls Inc"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Holyoke received 1.95 times its proportional share of competitive grant awards.

Local road miles **133.0** 46th of 351 · 3.5 per 1,000 residents (300th of 351)	Town-owned bridges, replacement cost **$50M** scored exposure $15.3M · none in poor condition	Road-stream crossings **113** 89th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **21.2 sq mi** 16% state-owned	Seasonal homes **0%** share of housing units	Peak service population **37,855** residents plus seasonal	Core infrastructure index **1.43** roads, culverts, dams, coast, flood, energy

Burden index 1.95; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **824 acres** 6.1% of land area · FY2026	State-owned land PILOT, FY2026 **$139,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$169** statewide $117 · FY2026	New growth per resident **$5,220** FY2017–2025 · 350th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

The Division of Local Services shows no FY2025 general-fund spending for Holyoke; in FY2016 state aid covered 57.9% of it.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **62.2%** $81M of $130M · median town 14.1%	FY2016 **57.9%** $82.4M of $142M · median town 12.2%	FY2025 not reported aid $118M; spending not reported · median town 11.5%	Net of state charges, FY2025 not reported FY2010: 50.8% · median town 10.0%

Holyoke's state aid did not keep pace with either price measure: FY2025 aid was 6.4% below its FY2006 aid grown by Boston-area consumer prices and 16.8% below grown by the government price index.

Gross state aid went from $81 million in FY2006 to $118 million in FY2025, +45.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +53.0%	Years squeezed **3 of 7** fixed costs grew faster than allowed levy growth · two years not reported	Health insurance **5 of 7** years it grew faster than allowed levy growth · two years not reported

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Holyoke's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3M	not reported	28.2%
Placed in the town	$3.3M	not reported	42.3%
Everything placed	$3.7M	not reported	45.2%

SCHOOLS

Holyoke's required school contribution is 1.7% of median household income, 326th highest of 351.

Chapter 70 aid, FY2026 **$107M** to the town's district	Required local contribution **$14M** FY2026
Share of household income **1.7%** 326th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Holyoke runs its own school district.

EXPECTED AND ACTUAL

Holyoke received $45 million in earmarks placed in the town and competitive grants over ten years, 89% of the $50.6 million its size, need and institutions predict.

PEERS

Holyoke ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Holyoke this town	**78**	**$31,543**	**$801**	**$93.22**	**1.95**	**1.7%**
Fitchburg peer	68	$22,494	$765	$118	2.33	2.1%
Chicopee peer · lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%
Chelsea peer	77	$32,370	$919	$147	3.69	2.6%
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
Gardner peer	60	$17,461	$784	$85.79	2.19	2.3%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Hopedale

Town · Worcester County · 6,027 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Worcester · Brian W. Murray

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Hopedale Public Schools, the town's own district

Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Mendon, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Hopedale scores 54 on the Fairness Index for all state aid and 46 for discretionary money. Fifty is a fair share.

ALL STATE AID

54 / 100

92nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	62	49	49

Rank under other weightings: 71st to 110th.

Weighting-dependent: the range crosses the 45–55 band

Hopedale received less than its share of state aid on two of four measures; its blended score of 54 stays between 51 and 56 under every weighting tested.

DISCRETIONARY MONEY ONLY

46 / 100

199th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	52	47	39

Rank under other weightings: 197th to 208th.

Weighting-dependent: the range crosses the 45–55 band

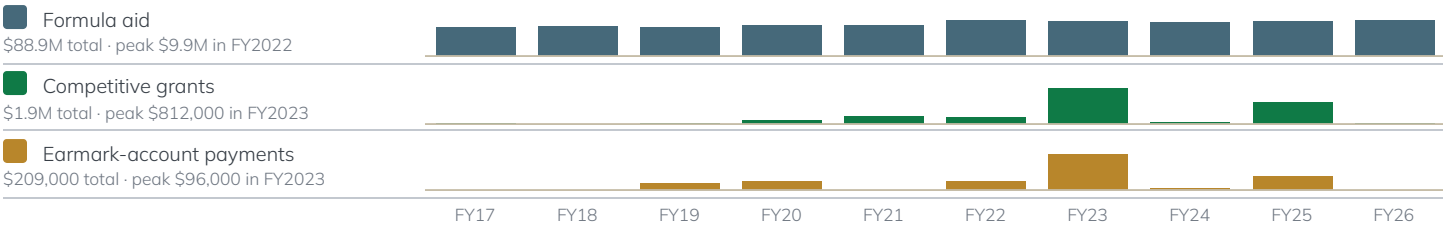
Hopedale received less than its share of discretionary money on three of four measures; its blended score of 46 stays between 44 and 48 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hopedale's town government and school districts received $88.9 million in formula aid and $1.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$88.9M	**$1.9M**	**$209,000**
$14,756 per resident (77th of 351) · gross	$309 per resident (205th of 351)	$34.76 per resident (130th of 351)

Competitive grants to Hopedale peaked in FY2023 at $812,000, 44% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

Hopedale received $402,000 in local earmarks naming the town, $852,000 placed in the town and $852,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$402,000	**$852,000**	**$852,000**	**Not a member**
$66.68 per resident (92nd of 351)	$141 per resident (33rd of 351)	$141 per resident (40th of 351)	35 municipalities had none

Placed in the town: 19 clauses in nine of ten budgets; the most recent in FY2026. $402,000 came in clauses that name Hopedale; the other $450,000 went to organizations based in Hopedale, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"improvements to the Phillips and Mellen field in the town of Hopedale"	Enacted names the town
FY2023	$65,000	"the purchase of an EMS stretcher power local system with a 6-year service agreement, for the town of Hopedale"	Enacted names the town
FY2026	$50,000	"The Serenity House, Inc"	Enacted recipient based here
FY2025	$50,000	"The Serenity House, Inc"	Enacted recipient based here
FY2024	$50,000	"The Serenity House, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Hopedale received 38% of its proportional share of competitive grant awards.

Local road miles **28.2** 326th of 351 · 4.7 per 1,000 residents (250th of 351)	Town-owned bridges, replacement cost **$3.4M** scored exposure $1.2M · one in poor condition	Road-stream crossings **20** 327th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **5.2 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **6,090** residents plus seasonal	Core infrastructure index **0.81** roads, culverts, dams, coast, flood, energy

Burden index 0.38; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$53** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$11.04** statewide $117 · FY2026	New growth per resident **$20,815** FY2017–2025 · 174th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 26.1% of Hopedale's general-fund spending in FY2025, down from 46.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **46.1%** $7.8M of $16.9M · median town 14.1%	FY2016 **38.8%** $8.4M of $21.6M · median town 12.2%	FY2025 **26.1%** $8.3M of $31.9M · median town 11.5%	Net of state charges, FY2025 **24.9%** FY2010: 40.3% · median town 10.0%

Hopedale's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $583,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hopedale's state aid did not keep pace with either price measure: FY2025 aid was 31.0% below its FY2006 aid grown by Boston-area consumer prices and 38.6% below grown by the government price index.

Gross state aid went from $7.8 million in FY2006 to $8.3 million in FY2025, +7.1% in dollars. Flag: in FY2010, $1.1 million of Hopedale's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+63.1%** $2.5M to $4.1M · all towns +54.0%	All fixed costs, FY2016–25 **+77.1%** $3.6M to $6.4M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hopedale's health insurance would have been $3.12 million in FY2025; it was $4.08 million, $957,000 above the path. Its fixed costs would have been $4.51 million in FY2025; it was $6.39 million, $1.88 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hopedale came to $367,000, 23.2% of the $1.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$367,000	23.2%	28.2%
Placed in the town	$767,000	48.6%	42.3%
Everything placed	$767,000	48.6%	45.2%

SCHOOLS

Hopedale's required school contribution is 3.2% of median household income, 40th highest of 351.

Chapter 70 aid, FY2026 **$7.1M** to the town's district	Required local contribution **$8M** FY2026
Share of household income **3.2%** 40th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–9%** after inflation

Hopedale runs its own school district and also belongs to Blackstone Valley; Hopedale accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Hopedale received $2.7 million in earmarks placed in the town and competitive grants over ten years, 69% of the $3.9 million its size, need and institutions predict.

PEERS

Hopedale ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hopedale this town	**54**	**$14,756**	**$309**	**$141**	**0.38**	**3.2%**
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Halifax peer	48	$12,543	$155	$155	0.34	2.6%
Southwick peer	56	$14,645	$652	$57.30	0.77	2.4%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Sturbridge peer	51	$13,598	$158	$56.22	0.74	2.5%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Williamsburg lowest in class of 30	41	$9,541	$578	$3.71	1.40	2.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Hopkinton

Town · Middlesex County · 19,358 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
8th Middlesex · James C. Arena-DeRosa

STATE SENATE
Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS
Hopkinton Public Schools, the town's own district
South Middlesex Regional Vocational Technical School District, vocational, shared with Ashland, Framingham, Holliston and Natick

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Hopkinton scores 31 on the Fairness Index for all state aid and 51 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

296th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	52	17	27

Rank under other weightings: 263rd to 335th.

Stable low: below 45 under every weighting

Hopkinton received less than its share of state aid on three of four measures; its blended score of 31 stays between 26 and 37 under every weighting tested.

DISCRETIONARY MONEY ONLY

51 / 100

183rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	69	45	44

Rank under other weightings: 164th to 196th.

Near fair: between 45 and 55 under every weighting

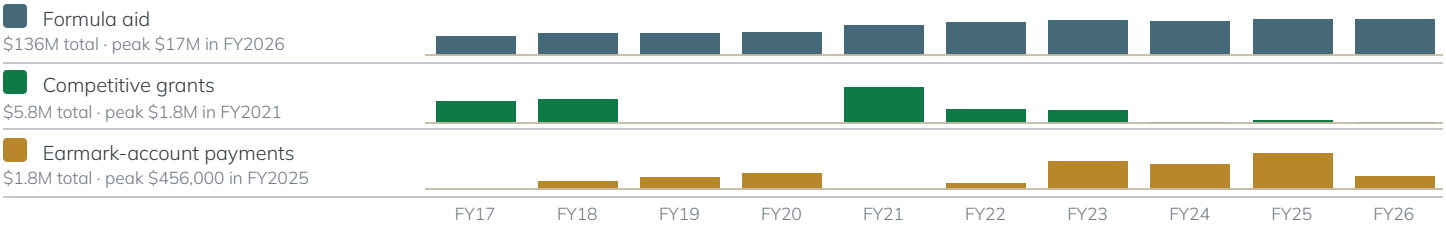
Hopkinton received less than its share of discretionary money on three of four measures; its blended score of 51 stays between 47 and 55 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hopkinton's town government and school districts received $136 million in formula aid and $5.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$136M	$5.8M	$1.8M
$7,048 per resident (288th of 351) · gross	$297 per resident (211th of 351)	$93.59 per resident (28th of 351)

Competitive grants to Hopkinton peaked in FY2021 at $1.8 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.4 million, are not shown.

EARMARKS

Hopkinton received $1.6 million in local earmarks naming the town, $1.8 million placed in the town and $1.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.6M	$1.8M	$1.8M	Not a member
$84.01 per resident (68th of 351)	$94.08 per resident (79th of 351)	$94.08 per resident (90th of 351)	35 municipalities had none

Placed in the town: 31 clauses in nine of ten budgets; the most recent in FY2026. $1.6 million came in clauses that name Hopkinton; the other $195,000 went to organizations based in Hopkinton, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$130,000	"the STEAMMATES program for at-risk students at Hopkinton High School"	Enacted names the town
FY2020	$125,000	"improvements to the fire department in the town of Hopkinton"	Enacted names the town
FY2026	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address..."	Enacted names the town
FY2025	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address..."	Enacted names the town
FY2026	$100,000	"Project Just Because, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Hopkinton received 33% of its proportional share of competitive grant awards.

Local road miles **116.8** 66th of 351 · 6.0 per 1,000 residents (188th of 351)	Town-owned bridges, replacement cost **$8.9M** scored exposure $1.5M · one in poor condition	Road-stream crossings **128** 65th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **26.2 sq mi** 13% state-owned	Seasonal homes **0%** share of housing units	Peak service population **19,358** residents plus seasonal	Core infrastructure index **0.83** roads, culverts, dams, coast, flood, energy

Burden index 0.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,748 acres** 10.4% of land area · FY2026	State-owned land PILOT, FY2026 **$656,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$375** statewide $117 · FY2026	New growth per resident **$71,310** FY2017–2025 · 15th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.9% of Hopkinton's general-fund spending in FY2025, down from 18.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.2%** $9.2M of $50.4M · median town 14.1%	FY2016 **12.7%** $8.6M of $67.5M · median town 12.2%	FY2025 **10.9%** $12M of $110M · median town 11.5%	Net of state charges, FY2025 **10.5%** FY2010: 14.8% · median town 10.0%

Hopkinton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $107,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hopkinton's state aid did not keep pace with either price measure: FY2025 aid was 15.7% below its FY2006 aid grown by Boston-area consumer prices and 25.1% below grown by the government price index.

Gross state aid went from $9.2 million in FY2006 to $12 million in FY2025, +30.7% in dollars. Flag: in FY2010, $2.2 million of Hopkinton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+89.4%** $5.6M to $10.7M · all towns +54.0%	All fixed costs, FY2016–25 **+76.8%** $8.5M to $15.1M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hopkinton's health insurance would have been $7.03 million in FY2025; it was $10.7 million, $3.64 million above the path. Its fixed costs would have been $10.7 million in FY2025; it was $15.1 million, $4.43 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2018 (+60%) and FY2025 (+66%); fixed costs changed by more than 30% in one year in FY2025 (+43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hopkinton came to $1.4 million, 28.8% of the $5.04 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	28.8%	28.2%
Placed in the town	$1.5M	30.7%	42.3%
Everything placed	$1.5M	30.7%	45.2%

SCHOOLS

Hopkinton's required school contribution is 3.1% of median household income, 47th highest of 351.

Chapter 70 aid, FY2026 **$11M** to the town's district	Required local contribution **$46.2M** FY2026
Share of household income **3.1%** 47th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Hopkinton runs its own school district and also belongs to South Middlesex; Hopkinton accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

Hopkinton received $7.6 million in earmarks placed in the town and competitive grants over ten years, 43% more than the $5.3 million its size, need and institutions predict.

PEERS

Hopkinton ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hopkinton this town	**31**	**$7,048**	**$297**	**$94.08**	**0.33**	**3.1%**
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Norwell peer	35	$7,878	$687	$57.61	1.24	3.4%
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Medfield peer	38	$8,137	$388	$46.47	2.14	2.3%
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Hubbardston

Town · Worcester County · 4,371 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Quabbin Regional School District, shared with Barre, Hardwick, New Braintree and Oakham

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Hubbardston scores 59 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

55th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	64	50	61

Rank under other weightings: 43rd to 66th.

Stable high: above 55 under every weighting

Hubbardston received more than its share of state aid on all four measures; its blended score of 59 stays between 56 and 61 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100

226th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	46	29	42

Rank under other weightings: 218th to 235th.

Stable low: below 45 under every weighting

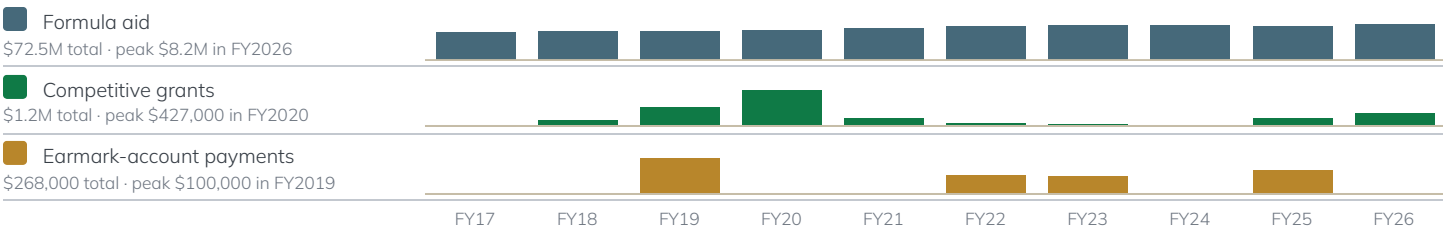
Hubbardston received less than its share of discretionary money on all four measures; its blended score of 40 stays between 37 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hubbardston's town government and school districts received $72.5 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$72.5M	**$1.2M**	**$268,000**
$16,583 per resident (51st of 351) · gross	$264 per resident (224th of 351)	$61.39 per resident (52nd of 351)

Competitive grants to Hubbardston peaked in FY2020 at $427,000, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

Hubbardston received $291,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$291,000	**$291,000**	**$291,000**	**Not a member**
$66.58 per resident (93rd of 351)	$66.58 per resident (121st of 351)	$66.58 per resident (127th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2025. Every one names Hubbardston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"the town of Hubbardston for repairs to the Hubbardston public library"	Enacted names the town
FY2025	$66,000	"the purchase of a replacement boiler at the Hubbardston Center school in the town of Hubbardston"	Enacted names the town
FY2023	$50,000	"the improvement of public works equipment and facilities in the town of Hubbardston"	Enacted names the town
FY2022	$50,000	"elevator improvements at the Hubbardston center school in the town of Hubbardston"	Enacted names the town
FY2023	$25,000	"the Hubbardston senior center in the town of Hubbardston"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hubbardston received 33% of its proportional share of competitive grant awards.

Local road miles **84.1** 141st of 351 · 19.2 per 1,000 residents (61st of 351)	Town-owned bridges, replacement cost **$13.5M** scored exposure $3.8M · one in poor condition	Road-stream crossings **76** 179th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **41.1 sq mi** 39% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,371** residents plus seasonal	Core infrastructure index **0.25** roads, culverts, dams, coast, flood, energy

Burden index 0.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,423 acres** 5.4% of land area · FY2026	State-owned land PILOT, FY2026 **$122,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$86.03** statewide $117 · FY2026	New growth per resident **$11,943** FY2017–2025 · 293rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.3% of Hubbardston's general-fund spending in FY2025, down from 8.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.0%** $488,000 of $6.1M · median town 14.1%	FY2016 **6.5%** $523,000 of $8M · median town 12.2%	FY2025 **6.3%** $712,000 of $11.4M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 7.4% · median town 10.0%

Hubbardston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $4.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hubbardston's state aid did not keep pace with either price measure: FY2025 aid was 5.9% below its FY2006 aid grown by Boston-area consumer prices and 16.4% below grown by the government price index.

Gross state aid went from $488,000 in FY2006 to $712,000 in FY2025, +45.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+0.7%** $156,000 to $158,000 · all towns +54.0%	All fixed costs, FY2016–25 **+71.8%** $470,000 to $808,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hubbardston's health insurance would have been $195,000 in FY2025; it was $158,000, $38,000 below the path. Its fixed costs would have been $587,000 in FY2025; it was $808,000, $221,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (+40%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hubbardston came to $291,000, 265.3 times the $1,097 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$291,000	265.3 times	28.2%
Placed in the town	$291,000	265.3 times	42.3%
Everything placed	$291,000	265.3 times	45.2%

SCHOOLS

Hubbardston's required school contribution is 2.3% of median household income, 275th highest of 351.

Chapter 70 aid, FY2026 **$4.9M** attributed to the town	Required local contribution **$4.8M** FY2026
Share of household income **2.3%** 275th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Hubbardston has no school district of its own. Its pupils attend Quabbin and Montachusett; Hubbardston accounts for 29% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Hubbardston received $1.4 million in earmarks placed in the town and competitive grants over ten years, 63% of the $2.3 million its size, need and institutions predict.

PEERS

Hubbardston ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hubbardston this town	**59**	**$16,583**	**$264**	**$66.58**	**0.33**	**2.3%**
Avon peer	46	$10,665	$1,049	$101	3.02	3.0%
Ashby peer	56	$15,057	$337	$62.29	0.63	2.3%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Shutesbury lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Hudson

Town · Middlesex County · 20,077 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Middlesex · Kate Hogan

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Hudson Public Schools, the town's own district

Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Marlborough, Maynard, Northborough, Southborough and Westborough

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Hudson scores 42 on the Fairness Index for all state aid and 36 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

196th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	45	43	37

Rank under other weightings: 179th to 208th.

Stable low: below 45 under every weighting

Hudson received less than its share of state aid on all four measures; its blended score of 42 stays between 41 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

36 / 100

241st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	37	40	30

Rank under other weightings: 229th to 250th.

Stable low: below 45 under every weighting

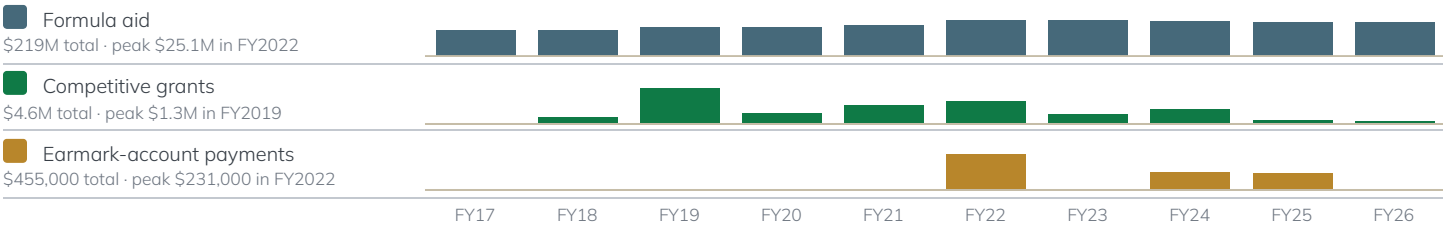
Hudson received less than its share of discretionary money on all four measures; its blended score of 36 stays between 34 and 37 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hudson's town government and school districts received $219 million in formula aid and $4.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$219M	$4.6M	$455,000
$10,896 per resident (149th of 351) · gross	$229 per resident (238th of 351)	$22.65 per resident (187th of 351)

Competitive grants to Hudson peaked in FY2019 at $1.3 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $26.4 million, are not shown.

EARMARKS

Hudson received $1.3 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	$1.3M	$1.3M	Not a member
$66.49 per resident (94th of 351)	$66.49 per resident (122nd of 351)	$66.49 per resident (128th of 351)	35 municipalities had none

Placed in the town: 19 clauses in nine of ten budgets; the most recent in FY2026. Every one names Hudson directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$230,000	"the town of Hudson to purchase the Hudson Armory located at the intersection of Park street and Washington street in the town of Hudson"	Enacted names the town
FY2023	$150,000	"the Hudson council on aging for general improvements to the Hudson Senior Center"	Enacted names the town
FY2026	$100,000	"Hudson Cultural Alliance, Inc. for the planning, construction, renovation, property management and maintenance work at the Hudson Armory located at…"	Enacted names the town
FY2022	$100,000	"Fresh Start Furniture Bank, Inc. in the town of Hudson"	Enacted names the town
FY2025	$75,000	"the Fresh Start Furniture Bank, Inc. of Hudson"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hudson received 91% of its proportional share of competitive grant awards.

Local road miles **87.7** 127th of 351 · 4.4 per 1,000 residents (266th of 351)	Town-owned bridges, replacement cost **$15.7M** scored exposure $3.9M · one in poor condition	Road-stream crossings **113** 89th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **11.5 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **20,120** residents plus seasonal	Core infrastructure index **1.64** roads, culverts, dams, coast, flood, energy

Burden index 0.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **110 acres** 1.5% of land area · FY2026	State-owned land PILOT, FY2026 **$94,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$857** statewide $117 · FY2026	New growth per resident **$16,430** FY2017–2025 · 234th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

The Division of Local Services shows no FY2025 general-fund spending for Hudson; in FY2016 state aid covered 19.9% of it.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.6%** $9M of $50.9M · median town 14.1%	FY2016 **19.9%** $14.6M of $73.3M · median town 12.2%	FY2025 not reported aid $18.9M; spending not reported · median town 11.5%	Net of state charges, FY2025 not reported FY2010: 16.2% · median town 10.0%

Hudson's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Hudson's state aid kept pace with both price measures: FY2025 aid was 35.9% above its FY2006 aid grown by Boston-area consumer prices and 20.7% above grown by the government price index.

Gross state aid went from $9 million in FY2006 to $18.9 million in FY2025, +110.7% in dollars. Flag: in FY2010, $443,000 of Hudson's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +53.0%	Years squeezed **3 of 7** fixed costs grew faster than allowed levy growth · two years not reported	Health insurance **2 of 7** years it grew faster than allowed levy growth · two years not reported

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Hudson's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.2M	not reported	28.2%
Placed in the town	$1.2M	not reported	42.3%
Everything placed	$1.2M	not reported	45.2%

SCHOOLS

Hudson's required school contribution is 3.1% of median household income, 63rd highest of 351.

Chapter 70 aid, FY2026 **$15.6M** to the town's district	Required local contribution **$26.4M** FY2026
Share of household income **3.1%** 63rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+0%** after inflation

Hudson runs its own school district and also belongs to Assabet Valley; Hudson accounts for 18% of that district's foundation budget.

EXPECTED AND ACTUAL

Hudson received $5.9 million in earmarks placed in the town and competitive grants over ten years, 70% of the $8.5 million its size, need and institutions predict.

PEERS

Hudson ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hudson this town	**42**	**$10,896**	**$229**	**$66.49**	**0.91**	**3.1%**
Winthrop peer · best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Amesbury peer	39	$9,706	$676	$64.69	2.17	2.8%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Hull

Town · Plymouth County · 10,138 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Plymouth · Joan Meschino

STATE SENATE
First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS
Hull Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Hull scores 42 on the Fairness Index for all state aid and 66 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

197th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	44	52	34

Rank under other weightings: 158th to 229th.

Weighting-dependent: the range crosses the 45–55 band

Hull received less than its share of state aid on three of four measures; its blended score of 42 stays between 38 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

66 / 100

124th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	72	64	63

Rank under other weightings: 119th to 127th.

Stable high: above 55 under every weighting

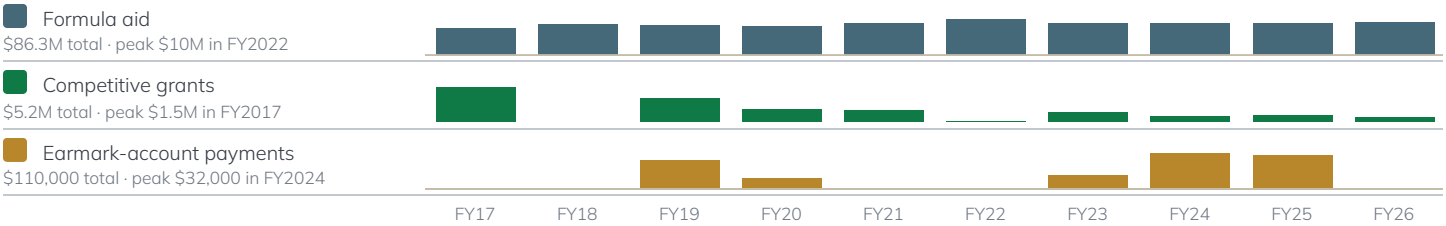
Hull received more than its share of discretionary money on all four measures; its blended score of 66 stays between 64 and 67 under every weighting tested.

STATE MONEY, FY2017–FY2026

Hull's town government and school districts received $86.3 million in formula aid and $5.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$86.3M	**$5.2M**	**$110,000**
$8,515 per resident (234th of 351) · gross	$509 per resident (137th of 351)	$10.83 per resident (256th of 351)

Competitive grants to Hull peaked in FY2017 at $1.5 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.3 million, are not shown.

EARMARKS

Hull received $1.1 million in local earmarks naming the town, $623,000 placed in the town and $1.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$623,000**	**$1.1M**	**Not a member**
$112 per resident (35th of 351)	$61.46 per resident (138th of 351)	$112 per resident (63rd of 351)	35 municipalities had none

Placed in the town: 18 clauses in nine of ten budgets; the most recent in FY2026. Every one names Hull directly.

Names the town includes $514,000 in clauses that name Hull but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $514,000 in four clauses for state facilities located in Hull (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$114,000	"establish a school resource officer position for the town of Hull public schools, including school resource officer salary and benefits, school…"	Enacted names the town
FY2024	$75,000	"the Hull Lifesaving Museum for a full-time maritime director position to operationalize new rowing programs for students, senior citizens and…"	Enacted names the town
FY2017	$75,000 (split two ways)	"a behavioral health pilot program in the towns of Quincy and Hull to be developed and run by the Manet Community Health Center, Incorporated"	Enacted names the town
FY2026	$40,000	"Hull Lifesaving Museum Inc. in the town of Hull to promote tourism in the south shore region"	Enacted names the town
FY2024	$35,000	"the purchase of a light duty truck for the animal control office in the town of Hull"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Hull received 1.65 times its proportional share of competitive grant awards.

Local road miles **50.8** 247th of 351 · 5.0 per 1,000 residents (231st of 351)	Town-owned bridges, replacement cost **$2.1M** scored exposure $190,000 · none in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **2.9 sq mi** 13% state-owned	Seasonal homes **13%** share of housing units	Peak service population **11,750** residents plus seasonal	Core infrastructure index **2.42** roads, culverts, dams, coast, flood, energy

Burden index 1.65; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **81 acres** 4.4% of land area · FY2026	State-owned land PILOT, FY2026 **$42,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$514** statewide $117 · FY2026	New growth per resident **$27,353** FY2017–2025 · 121st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.1% of Hull's general-fund spending in FY2025, down from 21.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.1%** $6.5M of $30.6M · median town 14.1%	FY2016 **16.7%** $6.2M of $36.9M · median town 12.2%	FY2025 **14.1%** $7M of $49.8M · median town 11.5%	Net of state charges, FY2025 **12.4%** FY2010: 16.2% · median town 10.0%

Hull's state aid did not keep pace with either price measure: FY2025 aid was 29.9% below its FY2006 aid grown by Boston-area consumer prices and 37.7% below grown by the government price index.

Gross state aid went from $6.5 million in FY2006 to $7 million in FY2025, +8.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+50.0%** $3.6M to $5.5M · all towns +54.0%	All fixed costs, FY2016–25 **+42.0%** $7.7M to $11M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Hull's health insurance would have been $4.55 million in FY2025; it was $5.47 million, $914,000 above the path. Its fixed costs would have been $9.66 million in FY2025; it was $11 million, $1.32 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Hull came to $959,000, 52.6% of the $1.82 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$959,000	52.6%	28.2%
Placed in the town	$573,000	31.5%	42.3%
Everything placed	$959,000	52.6%	45.2%

SCHOOLS

Hull's required school contribution is 1.6% of median household income, 332nd highest of 351.

Chapter 70 aid, FY2026 **$4.2M** to the town's district	Required local contribution **$8.6M** FY2026
Share of household income **1.6%** 332nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Hull runs its own school district.

EXPECTED AND ACTUAL

Hull received $6.1 million in earmarks placed in the town and competitive grants over ten years, 7% more than the $5.7 million its size, need and institutions predict.

PEERS

Hull ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Hull this town	**42**	**$8,515**	**$509**	**$61.46**	**1.65**	**1.6%**
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Wrentham peer	39	$9,318	$289	$48.99	0.85	3.0%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Seekonk peer	31	$7,825	$53.68	$16.99	1.67	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Huntington

Town · Hampshire County · 2,220 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Gateway Regional School District**, shared with Blandford, Chester, Middlefield, Montgomery and Russell	Pioneer Valley Planning Commission

FAIRNESS INDEX

Huntington scores 63 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

63 / 100

32nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	58	62	65

Rank under other weightings: 27th to 39th.

Stable high: above 55 under every weighting

Huntington received more than its share of state aid on all four measures; its blended score of 63 stays between 61 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100

26th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
95	93	95	94

Rank under other weightings: 16th to 31st.

Stable high: above 55 under every weighting

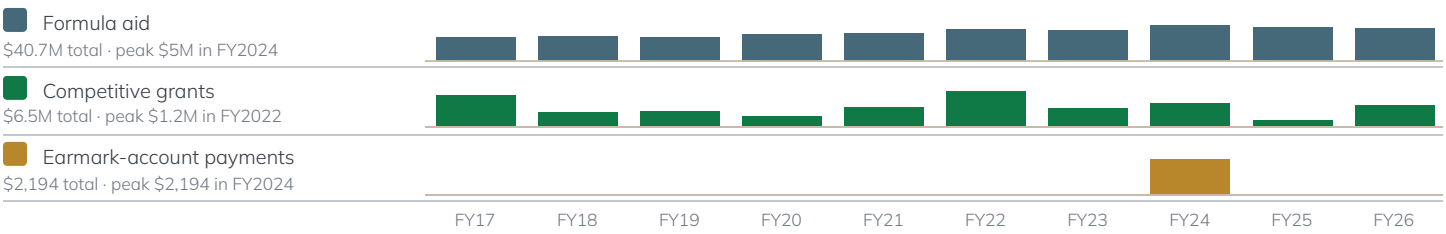
Huntington received more than its share of discretionary money on all four measures; its blended score of 94 stays between 94 and 95 under every weighting tested.

STATE MONEY, FY2017–FY2026

Huntington's town government and school districts received $40.7 million in formula aid and $6.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$40.7M	**$6.5M**	**$2,194**
$18,322 per resident (42nd of 351) · gross	$2,918 per resident (34th of 351)	$0.99 per resident (327th of 351)

Competitive grants to Huntington were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.1 million, are not shown.

EARMARKS

Huntington received $75,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$75,000	**$75,000**	**$75,000**	**Not a member**
$33.78 per resident (210th of 351)	$33.78 per resident (222nd of 351)	$33.78 per resident (225th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2026. Every one names Huntington directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$25,000	"It Takes A Village in the town of Huntington for postpartum and early parenting support for families in the western region of the commonwealth"	Enacted names the town
FY2025	$25,000	"It Takes A Village in the town of Huntington for postpartum and early parenting support for families in western Massachusetts"	Enacted names the town
FY2024	$25,000	"It Takes A Village in the town of Huntington for postpartum and early parenting support for families in the western Massachusetts"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Huntington received 25% of its proportional share of competitive grant awards.

Local road miles **36.6** 304th of 351 · 16.5 per 1,000 residents (67th of 351)	Town-owned bridges, replacement cost **$5M** scored exposure $842,000 · none in poor condition	Road-stream crossings **42** 288th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **26.3 sq mi** 14% state-owned	Seasonal homes **13%** share of housing units	Peak service population **2,547** residents plus seasonal	Core infrastructure index **0.18** roads, culverts, dams, coast, flood, energy

Burden index 0.25; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,033 acres** 12.1% of land area · FY2026	State-owned land PILOT, FY2026 **$73,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$35.93** statewide $117 · FY2026	New growth per resident **$7,755** FY2017–2025 · 341st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.6% of Huntington's general-fund spending in FY2025, up from 13.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.8%** $438,000 of $3.2M · median town 14.1%	FY2016 **15.2%** $654,000 of $4.3M · median town 12.2%	FY2025 **14.6%** $947,000 of $6.5M · median town 11.5%	Net of state charges, FY2025 **14.5%** FY2010: 14.5% · median town 10.0%

Huntington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Huntington's state aid kept pace with both price measures: FY2025 aid was 39.5% above its FY2006 aid grown by Boston-area consumer prices and 24.0% above grown by the government price index.

Gross state aid went from $438,000 in FY2006 to $947,000 in FY2025, +116.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–38.1%** $89,000 to $55,000 · all towns +54.0%	All fixed costs, FY2016–25 **+11.0%** $192,000 to $213,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Huntington's health insurance would have been $111,000 in FY2025; it was $55,000, $56,000 below the path. Its fixed costs would have been $240,000 in FY2025; it was $213,000, $27,000 below the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+32%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Huntington's reported health insurance fell from $89,000 in FY2016 to $55,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	no increase	28.2%
Placed in the town	$50,000	no increase	42.3%
Everything placed	$50,000	no increase	45.2%

SCHOOLS

Huntington's required school contribution is 2.5% of

EXPECTED AND ACTUAL

Huntington received $6.6 million in earmarks placed in the town and competitive grants over ten years,

median household income, 225th highest of 351.

Chapter 70 aid, FY2026 **$3M** attributed to the town	Required local contribution **$2M** FY2026
Share of household income **2.5%** 225th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Huntington has no school district of its own. Its pupils attend Huntington and Gateway; Huntington accounts for 100% and 34% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

about the $6.4 million its size, need and institutions predict.

PEERS

Huntington ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Huntington this town	**63**	**$18,322**	**$2,918**	**$33.78**	**0.25**	**2.5%**
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Ipswich

Town · Essex County · 13,930 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Essex · Kristin E. Kassner

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Ipswich Public Schools, the town's own district

Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Merrimac, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Ipswich scores 28 on the Fairness Index for all state aid and 33 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

325th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	36	28	22

Rank under other weightings: 314th to 329th.

Stable low: below 45 under every weighting

Ipswich received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

33 / 100

257th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	47	19	31

Rank under other weightings: 240th to 269th.

Stable low: below 45 under every weighting

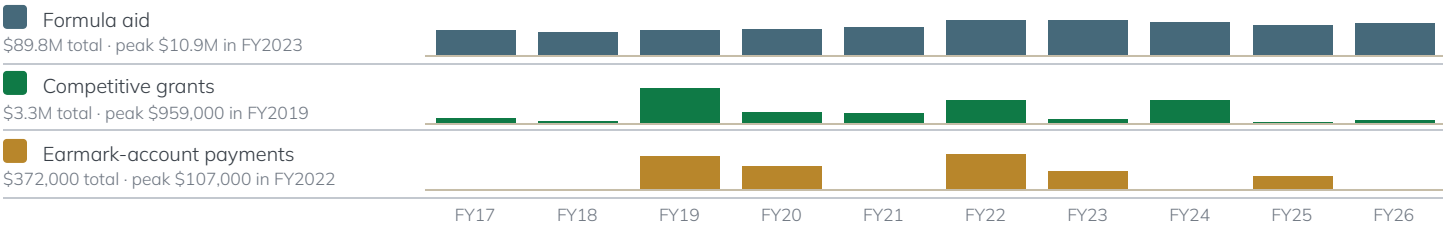
Ipswich received less than its share of discretionary money on all four measures; its blended score of 33 stays between 28 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ipswich's town government and school districts received $89.8 million in formula aid and $3.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$89.8M	$3.3M	$372,000
$6,449 per resident (321st of 351) · gross	$237 per resident (230th of 351)	$26.73 per resident (164th of 351)

Competitive grants to Ipswich peaked in FY2019 at $959,000, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.9 million, are not shown.

EARMARKS

Ipswich received $693,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$693,000	$693,000	$693,000	Not a member
$49.75 per resident (150th of 351)	$49.75 per resident (172nd of 351)	$49.75 per resident (176th of 351)	35 municipalities had none

Placed in the town: 18 clauses in eight of ten budgets; the most recent in FY2026. Every one names Ipswich directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$150,000	"the metropolitan area planning council for efforts to promote drinking water sustainability and aquifer protection in the Ipswich river watershed"	Enacted names the town
FY2019	$100,000	"public safety improvements in the town of Ipswich"	Enacted names the town
FY2026	$90,000	"a feasibility study for a new elementary school on the site of the current Doyon elementary school in the town of Ipswich"	Enacted names the town
FY2020	$50,000	"public safety improvements in Ipswich"	Enacted names the town
FY2022	$45,000	"water infrastructure improvements in the town of Ipswich"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ipswich received 55% of its proportional share of competitive grant awards.

Local road miles **74.5** 176th of 351 · 5.3 per 1,000 residents (216th of 351)	Town-owned bridges, replacement cost **$15.1M** scored exposure $6.8M · 1.5 in poor condition	Road-stream crossings **123** 72nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **32.1 sq mi** 13% state-owned	Seasonal homes **5%** share of housing units	Peak service population **14,637** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.55; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,194 acres** 10.7% of land area · FY2026	State-owned land PILOT, FY2026 **$667,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$304** statewide $117 · FY2026	New growth per resident **$24,171** FY2017–2025 · 143rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.8% of Ipswich's general-fund spending in FY2025, down from 21.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.0%** $6.8M of $32.6M · median town 14.1%	FY2016 **15.2%** $7M of $45.9M · median town 12.2%	FY2025 **11.8%** $7.6M of $63.9M · median town 11.5%	Net of state charges, FY2025 **11.3%** FY2010: 17.0% · median town 10.0%

Ipswich's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $107,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ipswich's state aid did not keep pace with either price measure: FY2025 aid was 28.5% below its FY2006 aid grown by Boston-area consumer prices and 36.5% below grown by the government price index.

Gross state aid went from $6.8 million in FY2006 to $7.6 million in FY2025, +10.8% in dollars. Flag: in FY2010, $1.4 million of Ipswich's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+342.4%** $1.2M to $5.3M · all towns +54.0%	All fixed costs, FY2016–25 **+252.2%** $2.9M to $10.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ipswich's health insurance would have been $1.51 million in FY2025; it was $5.34 million, $3.84 million above the path. Its fixed costs would have been $3.65 million in FY2025; it was $10.3 million, $6.64 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+128%); health insurance changed by more than 30% in one year in FY2024 (+225%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ipswich came to $576,000, 13.9% of the $4.14 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$576,000	13.9%	28.2%
Placed in the town	$576,000	13.9%	42.3%
Everything placed	$576,000	13.9%	45.2%

SCHOOLS

Ipswich's required school contribution is 2.3% of median household income, 276th highest of 351.

Chapter 70 aid, FY2026 **$4.7M** to the town's district	Required local contribution **$18.3M** FY2026
Share of household income **2.3%** 276th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Ipswich runs its own school district and also belongs to Whittier; Ipswich accounts for 2% of that district's foundation budget.

EXPECTED AND ACTUAL

Ipswich received $4.3 million in earmarks placed in the town and competitive grants over ten years, 72% of the $5.9 million its size, need and institutions predict.

PEERS

Ipswich ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ipswich this town	**28**	**$6,449**	**$237**	**$49.75**	**0.55**	**2.3%**
Lynnfield peer	30	$7,167	$206	$147	0.81	3.0%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Hanover peer	38	$9,140	$220	$18.83	0.60	2.8%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Kingston

Town · Plymouth County · 14,027 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Plymouth · Kathleen R. LaNatra

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Kingston Public Schools, the town's own district

Silver Lake Regional School District, shared with Halifax and Plympton

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Kingston scores 44 on the Fairness Index for all state aid and 74 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

175th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	54	38	38

Rank under other weightings: 157th to 201st.

Weighting-dependent: the range crosses the 45–55 band

Kingston received less than its share of state aid on three of four measures; its blended score of 44 stays between 40 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

74 / 100

92nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
73	80	73	68

Rank under other weightings: 87th to 100th.

Stable high: above 55 under every weighting

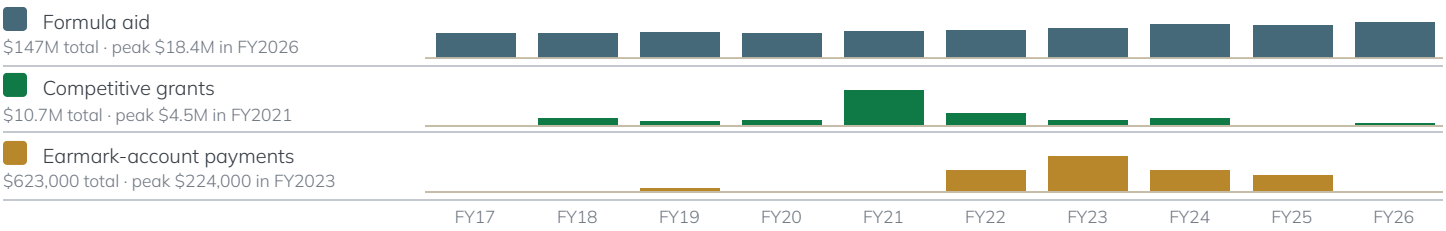
Kingston received more than its share of discretionary money on all four measures; its blended score of 74 stays between 72 and 75 under every weighting tested.

STATE MONEY, FY2017–FY2026

Kingston's town government and school districts received $147 million in formula aid and $10.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$147M	**$10.7M**	**$623,000**
$10,470 per resident (169th of 351) · gross	$762 per resident (102nd of 351)	$44.38 per resident (92nd of 351)

Competitive grants to Kingston peaked in FY2021 at $4.5 million, 42% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.5 million, are not shown.

EARMARKS

Kingston received $580,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$580,000	**$580,000**	**$580,000**	**Not a member**
$41.35 per resident (179th of 351)	$41.35 per resident (198th of 351)	$41.35 per resident (201st of 351)	35 municipalities had none

Placed in the town: 17 clauses in eight of ten budgets; the most recent in FY2026. Every one names Kingston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the town of Kingston for the construction of a veterans memorial"	Enacted names the town
FY2026	$50,000	"Kingston 300, Inc. to print and design a book to support the town of Kingston's 300th Anniversary Celebration"	Enacted names the town
FY2025	$50,000	"Kingston to support Kingston's 300th anniversary celebration events"	Enacted names the town
FY2025	$50,000	"the town of Kingston for public safety efforts"	Enacted names the town
FY2023	$50,000	"the Kingston recreation department for improvements to fields and playgrounds"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Kingston received 2.68 times its proportional share of competitive grant awards.

Local road miles **69.2** 191st of 351 · 4.9 per 1,000 residents (238th of 351)	Town-owned bridges, replacement cost **$3M** scored exposure $278,000 · none in poor condition	Road-stream crossings **79** 170th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **18.6 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **14,161** residents plus seasonal	Core infrastructure index **3.70** roads, culverts, dams, coast, flood, energy

Burden index 2.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **110 acres** 0.9% of land area · FY2026	State-owned land PILOT, FY2026 **$57,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$520** statewide $117 · FY2026	New growth per resident **$33,537** FY2017–2025 · 88th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.9% of Kingston's general-fund spending in FY2025, down from 20.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.6%** $6.1M of $29.5M · median town 14.1%	FY2016 **15.7%** $6.7M of $42.4M · median town 12.2%	FY2025 **11.9%** $7.2M of $60.3M · median town 11.5%	Net of state charges, FY2025 **11.0%** FY2010: 17.5% · median town 10.0%

Kingston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Kingston's state aid did not keep pace with either price measure: FY2025 aid was 23.4% below its FY2006 aid grown by Boston-area consumer prices and 32.0% below grown by the government price index.

Gross state aid went from $6.1 million in FY2006 to $7.2 million in FY2025, +18.7% in dollars. Flag: in FY2010, $1.2 million of Kingston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+65.6%** $2.2M to $3.6M · all towns +54.0%	All fixed costs, FY2016–25 **+80.7%** $4.8M to $8.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Kingston's health insurance would have been $2.73 million in FY2025; it was $3.62 million, $890,000 above the path. Its fixed costs would have been $6.03 million in FY2025; it was $8.72 million, $2.69 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Kingston came to $492,000, 34.3% of the $1.43 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$492,000	34.3%	28.2%
Placed in the town	$492,000	34.3%	42.3%
Everything placed	$492,000	34.3%	45.2%

SCHOOLS

Kingston's required school contribution is 3.0% of median household income, 77th highest of 351.

Chapter 70 aid, FY2026 **$12M** to the town's district	Required local contribution **$20.4M** FY2026
Share of household income **3.0%** 77th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Kingston runs its own district for some grades and belongs to Silver Lake for others; Kingston accounts for 57% of that district's foundation budget.

EXPECTED AND ACTUAL

Kingston received $11.8 million in earmarks placed in the town and competitive grants over ten years, 60% more than the $7.4 million its size, need and institutions predict.

PEERS

Kingston ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Kingston this town	**44**	**$10,470**	**$762**	**$41.35**	**2.68**	**3.0%**
Sutton peer	44	$10,223	$840	$107	1.91	3.1%
Wrentham peer	39	$9,318	$289	$48.99	0.85	3.0%
Seekonk peer	31	$7,825	$53.68	$16.99	1.67	3.0%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Lakeville

Town · Plymouth County · 11,944 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Bristol · Norman J. Orrall

STATE SENATE

First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS

Freetown-Lakeville Regional School District, shared with Freetown
Old Colony Regional Vocational Technical School District, vocational, shared with Acushnet, Carver, Mattapoisett and Rochester

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Lakeville scores 44 on the Fairness Index for all state aid and 21 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

167th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	54	39	42

Rank under other weightings: 155th to 187th.

Weighting-dependent: the range crosses the 45–55 band

Lakeville received less than its share of state aid on three of four measures; its blended score of 44 stays between 42 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

21 / 100

307th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
20	28	17	20

Rank under other weightings: 304th to 313th.

Stable low: below 45 under every weighting

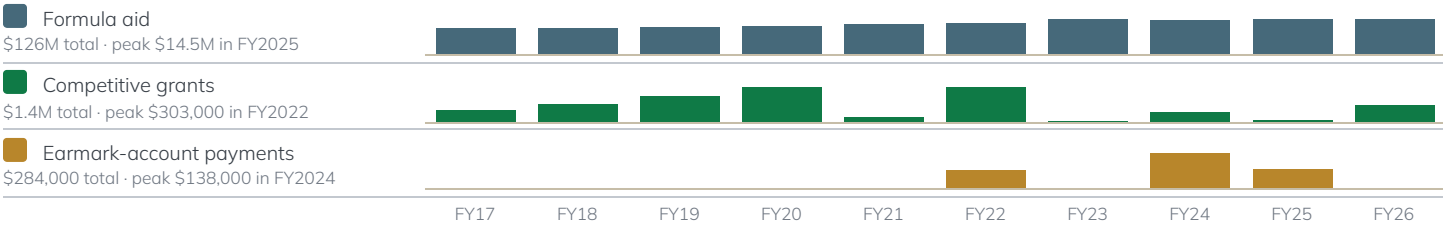
Lakeville received less than its share of discretionary money on all four measures; its blended score of 21 stays between 19 and 23 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lakeville's town government and school districts received $126 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$126M	**$1.4M**	**$284,000**
$10,579 per resident (166th of 351) · gross	$119 per resident (314th of 351)	$23.80 per resident (179th of 351)

Competitive grants to Lakeville peaked in FY2022 at $303,000, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.6 million, are not shown.

EARMARKS

Lakeville received $612,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$612,000	**$612,000**	**$612,000**	**Not a member**
$51.28 per resident (144th of 351)	$51.28 per resident (168th of 351)	$51.28 per resident (173rd of 351)	35 municipalities had none

Placed in the town: 13 clauses in seven of ten budgets; the most recent in FY2026. Every one names Lakeville directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the town of Lakeville for improvements to the Assawompset elementary school playground"	Enacted names the town
FY2025	$75,000	"the town of Lakeville for ADA-compliant improvements to enhance and improve accessibility at the Lakeville public library"	Enacted names the town
FY2024	$75,000	"as a grant to the town of Lakeville for improvements to the Peach Barn and associated properties on Betty's Neck"	Enacted names the town
FY2026	$60,000	"as a grant to the Long Pond Association, Inc. in the town of Lakeville for the management and eradication of invasive weeds in Long pond"	Enacted names the town
FY2025	$60,000	"as a grant to the Long Pond Association, Inc. in the town of Lakeville for the management and eradication of invasive weeds in Long Pond"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lakeville received 46% of its proportional share of competitive grant awards.

Local road miles **78.1** 163rd of 351 · 6.5 per 1,000 residents (175th of 351)	Town-owned bridges, replacement cost **$4.2M** scored exposure $1.3M · none in poor condition	Road-stream crossings **81** 161st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **29.6 sq mi** 3% state-owned	Seasonal homes **4%** share of housing units	Peak service population **12,429** residents plus seasonal	Core infrastructure index **0.21** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **89 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$25,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$278** statewide $117 · FY2026	New growth per resident **$23,148** FY2017–2025 · 151st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

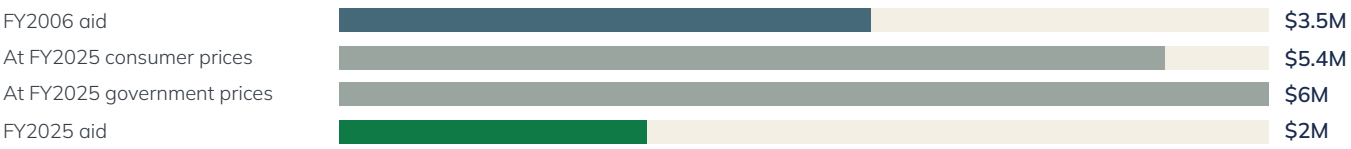
State aid covered 5.7% of Lakeville's general-fund spending in FY2025, down from 17.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.8%** $3.5M of $19.4M · median town 14.1%	FY2016 **5.3%** $1.2M of $23.4M · median town 12.2%	FY2025 **5.7%** $2M of $35.1M · median town 11.5%	Net of state charges, FY2025 **5.1%** FY2010: 14.2% · median town 10.0%

Lakeville's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lakeville's state aid did not keep pace with either price measure: FY2025 aid was 62.7% below its FY2006 aid grown by Boston-area consumer prices and 66.8% below grown by the government price index.



Gross state aid went from $3.5 million in FY2006 to $2 million in FY2025, −42.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+41.9%** $1.4M to $1.9M · all towns +54.0%	All fixed costs, FY2016–25 **+65.2%** $2.5M to $4.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lakeville's health insurance would have been $1.71 million in FY2025; it was $1.94 million, $232,000 above the path. Its fixed costs would have been $3.07 million in FY2025; it was $4.06 million, $991,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lakeville came to $552,000, 96.7% of the $572,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$552,000	96.7%	28.2%
Placed in the town	$552,000	96.7%	42.3%
Everything placed	$552,000	96.7%	45.2%

SCHOOLS

Lakeville's required school contribution is 3.0% of median household income, 66th highest of 351.

Chapter 70 aid, FY2026 **$8.3M** attributed to the town	Required local contribution **$17.2M** FY2026
Share of household income **3.0%** 66th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Lakeville has no school district of its own. Its pupils attend Lakeville, Freetown-Lakeville and Old Colony; Lakeville accounts for 100%, 58% and 25% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Lakeville received $3.6 million in earmarks placed in the town and competitive grants over ten years, 77% of the $4.7 million its size, need and institutions predict.

PEERS

Lakeville ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lakeville this town	**44**	**$10,579**	**$119**	**$51.28**	**0.46**	**3.0%**
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Lancaster

Town · Worcester County · 8,606 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
12th Worcester · Meghan K. Kilcoyne

STATE SENATE
Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS
Nashoba Regional School District, shared with Bolton and Stow
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Concord, Dover, Lexington, Needham and Stow

REGIONAL PLANNING AGENCY
Montachusett Regional Planning Commission

FAIRNESS INDEX

Lancaster scores 36 on the Fairness Index for all state aid and 41 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

248th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	45	36	28

Rank under other weightings: 240th to 261st.

Stable low: below 45 under every weighting

Lancaster received less than its share of state aid on all four measures; its blended score of 36 stays between 34 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

41 / 100

220th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	51	38	33

Rank under other weightings: 212th to 227th.

Stable low: below 45 under every weighting

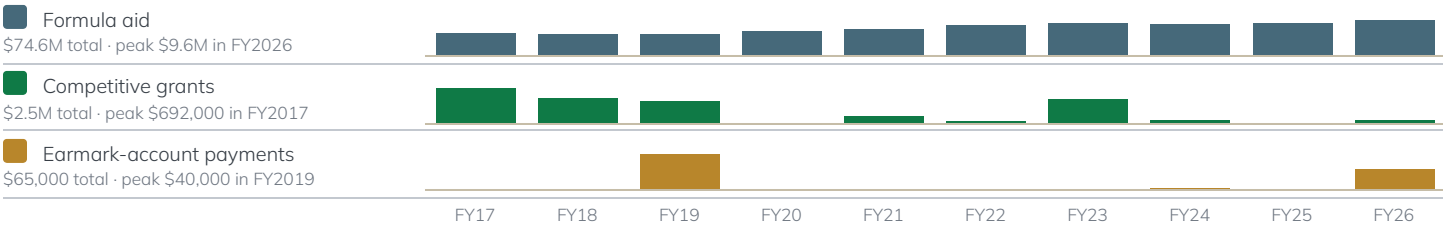
Lancaster received less than its share of discretionary money on three of four measures; its blended score of 41 stays between 37 and 44 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lancaster's town government and school districts received $74.6 million in formula aid and $2.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$74.6M	$2.5M	$65,000
$8,666 per resident (231st of 351) · gross	$286 per resident (215th of 351)	$7.51 per resident (271st of 351)

Competitive grants to Lancaster peaked in FY2017 at $692,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.6 million, are not shown.

EARMARKS

Lancaster received $420,000 in local earmarks naming the town, $545,000 placed in the town and $545,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$420,000	$545,000	$545,000	Not a member
$48.80 per resident (154th of 351)	$63.33 per resident (134th of 351)	$63.33 per resident (139th of 351)	35 municipalities had none

Placed in the town: ten clauses in six of ten budgets; the most recent in FY2026. $420,000 came in clauses that name Lancaster; the other $125,000 went to organizations based in Lancaster, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$100,000	"World Farmers, Inc. to improve its agricultural production"	Enacted recipient based here
FY2024	$100,000	"World Farmers, Inc. in the town of Lancaster for its farming operations and farmers markets"	Enacted names the town
FY2024	$80,000	"infrastructure improvements to the Lancaster Community Center in the town of Lancaster"	Enacted names the town
FY2017	$65,000	"the Thayer Field Foundation, Incorporated to build a playground in the town of Lancaster"	Enacted names the town
FY2025	$50,000	"Lancaster for library improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lancaster received 91% of its proportional share of competitive grant awards.

Local road miles **63.4** 209th of 351 · 7.4 per 1,000 residents (148th of 351)	Town-owned bridges, replacement cost **$22.4M** scored exposure $5.3M · none in poor condition	Road-stream crossings **89** 142nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **27.5 sq mi** 5% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,606** residents plus seasonal	Core infrastructure index **0.92** roads, culverts, dams, coast, flood, energy

Burden index 0.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,377 acres** 7.8% of land area · FY2026	State-owned land PILOT, FY2026 **$218,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$158** statewide $117 · FY2026	New growth per resident **$16,407** FY2017–2025 · 235th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.4% of Lancaster's general-fund spending in FY2025, down from 7.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.6%** $1M of $13.3M · median town 14.1%	FY2016 **5.9%** $1.1M of $18.6M · median town 12.2%	FY2025 **5.4%** $1.5M of $27.6M · median town 11.5%	Net of state charges, FY2025 **4.8%** FY2010: 5.7% · median town 10.0%

Lancaster's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lancaster's state aid did not keep pace with either price measure: FY2025 aid was 5.7% below its FY2006 aid grown by Boston-area consumer prices and 16.2% below grown by the government price index.

Gross state aid went from $1 million in FY2006 to $1.5 million in FY2025, +46.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.2%** $524,000 to $745,000 · all towns +54.0%	All fixed costs, FY2016–25 **+68.8%** $1.2M to $1.9M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lancaster's health insurance would have been $654,000 in FY2025; it was $745,000, $90,000 above the path. Its fixed costs would have been $1.44 million in FY2025; it was $1.94 million, $505,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2019 (+43%) and FY2025 (+31%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lancaster came to $375,000, 169.8% of the $221,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$375,000	169.8%	28.2%
Placed in the town	$475,000	2.2 times	42.3%
Everything placed	$475,000	2.2 times	45.2%

SCHOOLS

Lancaster's required school contribution is 2.5% of median household income, 218th highest of 351.

Chapter 70 aid, FY2026 **$5M** attributed to the town	Required local contribution **$10M** FY2026
Share of household income **2.5%** 218th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Lancaster has no school district of its own. Its pupils attend Lancaster, Nashoba and Minuteman; Lancaster accounts for 100%, 33% and 9% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Lancaster received $3.4 million in earmarks placed in the town and competitive grants over ten years, 84% of the $4 million its size, need and institutions predict.

PEERS

Lancaster ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lancaster this town	**36**	**$8,666**	**$286**	**$63.33**	**0.91**	**2.5%**
Rutland peer	59	$17,290	$124	$22.03	0.61	2.2%
Dighton peer	56	$15,030	$168	$76.89	0.53	2.4%
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Hanson peer	51	$12,622	$231	$52.67	0.66	2.6%
Berkley peer	51	$12,903	$95.35	$13.91	0.18	2.7%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Lanesborough

Town · Berkshire County · 3,028 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Berkshire · John Barrett, III

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mount Greylock Regional School District, shared with Williamstown

Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Florida, Monroe, North Adams, Savoy and Williamstown

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Lanesborough scores 40 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

213th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	42	40	33

Rank under other weightings: 197th to 241st.

Stable low: below 45 under every weighting

Lanesborough received less than its share of state aid on all four measures; its blended score of 40 stays between 38 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

185th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	52	52	43

Rank under other weightings: 169th to 195th.

Near fair: between 45 and 55 under every weighting

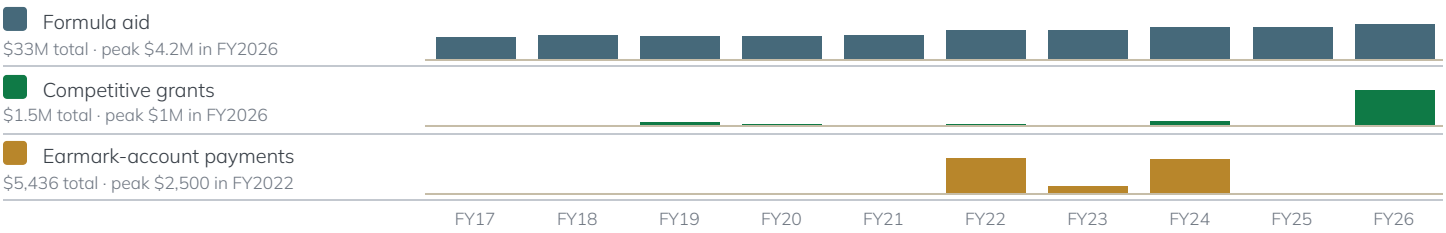
Lanesborough received more than its share of discretionary money on three of four measures; its blended score of 50 stays between 49 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lanesborough's town government and school districts received $33 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$33M	**$1.5M**	**$5,436**
$10,886 per resident (150th of 351) · gross	$484 per resident (142nd of 351)	$1.80 per resident (317th of 351)

Competitive grants to Lanesborough peaked in FY2026 at $1 million, 69% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.8 million, are not shown.

EARMARKS

No local earmark was placed in Lanesborough in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $5,436 in payments to Lanesborough's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Lanesborough.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Lanesborough's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
East Brookfield	$205,000	$205,000	$205,000	$94.64
Bernardston	$0	$0	$0	$0
Phillipston	$150,000	$150,000	$150,000	$79.16
Holland	$100,000	$100,000	$100,000	$38.71
Ashfield	$62,000	$92,000	$92,000	$48.86

WHAT THE TOWN CARRIES

Measured against what it maintains, Lanesborough received 1.16 times its proportional share of competitive grant awards.

Local road miles **48.3** 261st of 351 · 15.9 per 1,000 residents (70th of 351)	Town-owned bridges, replacement cost **$10.1M** scored exposure $3.7M · two in poor condition	Road-stream crossings **89** 142nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **28.9 sq mi** 20% state-owned	Seasonal homes **10%** share of housing units	Peak service population **3,354** residents plus seasonal	Core infrastructure index **3.18** roads, culverts, dams, coast, flood, energy

Burden index 1.16; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,785 acres** 15.1% of land area · FY2026	State-owned land PILOT, FY2026 **$187,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$67.19** statewide $117 · FY2026	New growth per resident **$19,566** FY2017–2025 · 193rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

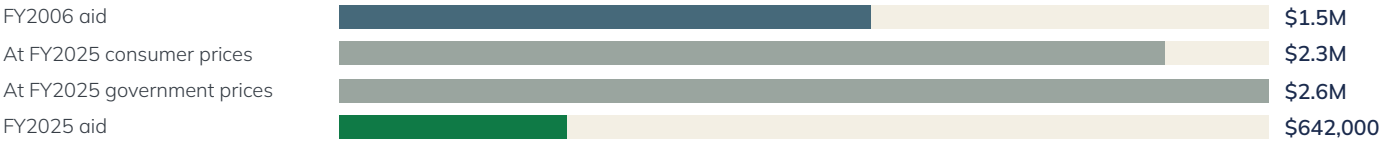
State aid covered 5.3% of Lanesborough's general-fund spending in FY2025, down from 18.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.6%** $1.5M of $8M · median town 14.1%	FY2016 **17.3%** $1.8M of $10.3M · median town 12.2%	FY2025 **5.3%** $642,000 of $12.2M · median town 11.5%	Net of state charges, FY2025 **4.8%** FY2010: 18.4% · median town 10.0%

Lanesborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lanesborough's state aid did not keep pace with either price measure: FY2025 aid was 72.3% below its FY2006 aid grown by Boston-area consumer prices and 75.4% below grown by the government price index.



Gross state aid went from $1.5 million in FY2006 to $642,000 in FY2025, –57.1% in dollars. Flag: in FY2010, $463,000 of Lanesborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–40.1%** $1.2M to $738,000 · all towns +54.0%	All fixed costs, FY2016–25 **–30.2%** $1.7M to $1.2M · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lanesborough's health insurance would have been $1.54 million in FY2025; it was $738,000, $800,000 below the path. Its fixed costs would have been $2.09 million in FY2025; it was $1.17 million, $923,000 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (–39%); health insurance changed by more than 30% in one year in FY2019 (–48%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Lanesborough's reported health insurance fell from $1.2 million in FY2016 to $738,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Lanesborough's required school contribution is 2.8% of median household income, 114th highest of 351.

Chapter 70 aid, FY2026 **$2.6M** attributed to the town	Required local contribution **$3.3M** FY2026
Share of household income **2.8%** 114th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Lanesborough has no school district of its own. Its pupils attend Mount Greylock and Northern Berkshire; Lanesborough accounts for 34% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Lanesborough received $1.5 million in earmarks placed in the town and competitive grants over ten years, 54% of the $2.7 million its size, need and institutions predict.

PEERS

Lanesborough is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lanesborough this town	**40**	**$10,886**	**$484**	**$0**	**1.16**	**2.8%**
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Holland peer	45	$10,480	$1,150	$38.71	0.46	2.7%
Ashfield peer	45	$10,211	$1,970	$48.86	1.85	2.4%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Lawrence

City · Essex County · 88,736 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

16th Essex · Francisco E. Paulino 39% of residents
17th Essex · Frank A. Moran 37% of residents
4th Essex · Estela A. Reyes 24% of residents

Lawrence is split among three House districts. Shares are of 2020 residents.

STATE SENATE

First Essex · Pavel M. Payano

SCHOOL DISTRICTS

Lawrence Public Schools, the city's own district
Greater Lawrence Regional Vocational Technical School District, vocational, shared with Andover, Methuen and North Andover

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Lawrence scores 81 on the Fairness Index for all state aid and 54 for discretionary money. Fifty is a fair share.

ALL STATE AID

81 / 100

2nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	75	76	91

Rank under other weightings: 1st to 2nd.

Stable high: above 55 under every weighting

Lawrence received more than its share of state aid on all four measures; its blended score of 81 stays between 78 and 85 under every weighting tested.

DISCRETIONARY MONEY ONLY

54 / 100

167th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	39	54	69

Rank under other weightings: 141st to 192nd.

Weighting-dependent: the range crosses the 45–55 band

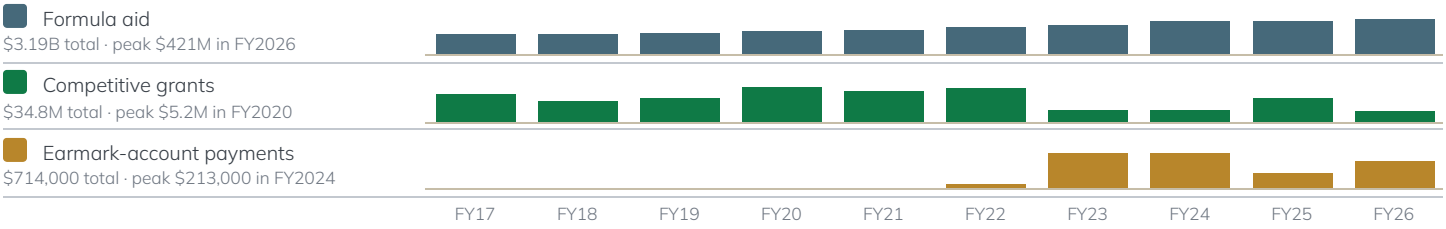
Lawrence received more than its share of discretionary money on three of four measures; its blended score of 54 stays between 49 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lawrence's town government and school districts received $3.19 billion in formula aid and $34.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$3.19B	$34.8M	$714,000
$35,983 per resident (1st of 351) · gross	$392 per resident (173rd of 351)	$8.05 per resident (269th of 351)

Competitive grants to Lawrence were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $106 million, are not shown.

EARMARKS

Lawrence received $4.7 million in local earmarks naming the town, $6.5 million placed in the town and $6.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.7M	$6.5M	$6.5M	Not a member
$53.35 per resident (137th of 351)	$72.86 per resident (108th of 351)	$73.42 per resident (114th of 351)	35 municipalities had none

Placed in the town: 160 clauses in ten of ten budgets; the most recent in FY2026. $4.7 million came in clauses that name Lawrence; the other $1.8 million went to organizations based in Lawrence, some of which serve a wider area.

Names the town includes $50,000 in clauses that name Lawrence but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Lawrence (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$250,000	"Greater Lawrence Family Health Center, Inc. to expand and sustain its mobile health program in communities throughout the Merrimack Valley"	Enacted names the town
FY2018	$200,000	"the Greater Lawrence Family Health Center, Inc"	Enacted names the town
FY2026	$153,000	"Family Services of the Merrimack Valley, Inc. for their court appointed special advocate program in Essex county"	Enacted recipient based here
FY2021	$150,000	"Lazarus House, Inc. for its Holly street shelter and its soup kitchen for the costs incurred to provide extra support to the city of Lawrence during..."	Enacted names the town
FY2024	$125,000	"Greater Lawrence Family Health Center, Inc. to address unmet acute patient health needs including, but not limited to, medical and behavioral health..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lawrence received 1.09 times its proportional share of competitive grant awards.

Local road miles **123.2** 59th of 351 · 1.4 per 1,000 residents (346th of 351)	Town-owned bridges, replacement cost **$186M** scored exposure $88.3M · four in poor condition	Road-stream crossings **60** 230th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **6.9 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **88,736** residents plus seasonal	Core infrastructure index **1.24** roads, culverts, dams, coast, flood, energy

Burden index 1.09; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$15,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$7,254** statewide $117 · FY2026	New growth per resident **$10,277** FY2017–2025 · 317th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 72.2% of Lawrence's general-fund spending in FY2025, up from 65.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **65.0%** $147M of $227M · median town 14.1%	FY2016 **73.3%** $205M of $279M · median town 12.2%	FY2025 **72.2%** $320M of $444M · median town 11.5%	Net of state charges, FY2025 **62.1%** FY2010: 54.5% · median town 10.0%

Lawrence's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $31.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lawrence's state aid kept pace with both price measures: FY2025 aid was 40.2% above its FY2006 aid grown by Boston-area consumer prices and 24.6% above grown by the government price index.

Gross state aid went from $147 million in FY2006 to $320 million in FY2025, +117.4% in dollars. Flag: in FY2010, $7 million of Lawrence's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.5%** $14.1M to $19.4M · all towns +54.0%	All fixed costs, FY2016–25 **+27.6%** $24.5M to $31.2M · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lawrence's health insurance would have been $17.6 million in FY2025; it was $19.4 million, $1.78 million above the path. Its fixed costs would have been $30.6 million in FY2025; it was $31.2 million, $658,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lawrence came to $4.1 million, 77.5% of the $5.29 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.1M	77.5%	28.2%
Placed in the town	$5.4M	102.7%	42.3%
Everything placed	$5.5M	103.6%	45.2%

SCHOOLS

Lawrence's required school contribution is 1.0% of median household income, the seventh-lowest of 351.

Chapter 70 aid, FY2026 **$351M** to the town's district	Required local contribution **$18M** FY2026
Share of household income **1.0%** 345th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+29%** after inflation

Lawrence runs its own school district and also belongs to Greater Lawrence; Lawrence accounts for 70% of that district's foundation budget.

EXPECTED AND ACTUAL

Lawrence received $55 million in earmarks placed in the town and competitive grants over ten years, 76% of the $72.8 million its size, need and institutions predict.

PEERS

Lawrence ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lawrence this town	**81**	**$35,983**	**$392**	**$72.86**	**1.09**	**1.0%**
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Chicopee peer · lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%
Lynn peer	72	$27,652	$300	$97.57	1.51	2.5%
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Lee

Town · Berkshire County · 5,719 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Lee Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Lee scores 38 on the Fairness Index for all state aid and 84 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100
233rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	34	42	42

Rank under other weightings: 200th to 269th.

Stable low: below 45 under every weighting

Lee received less than its share of state aid on all four measures; its blended score of 39 stays between 36 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

84 / 100
60th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
85	84	80	88

Rank under other weightings: 57th to 62nd.

Stable high: above 55 under every weighting

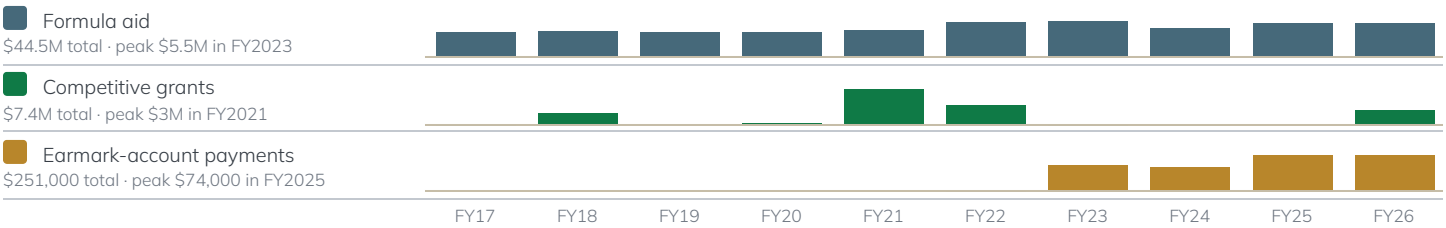
Lee received more than its share of discretionary money on all four measures; its blended score of 84 stays between 83 and 86 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lee's town government and school districts received $44.5 million in formula aid and $7.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$44.5M	**$7.4M**	**$251,000**
$7,783 per resident (265th of 351) · gross	$1,292 per resident (63rd of 351)	$43.92 per resident (94th of 351)

Competitive grants to Lee peaked in FY2021 at $3 million, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.5 million, are not shown.

EARMARKS

Lee received $125,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$125,000	**$125,000**	**$125,000**	**Not a member**
$21.86 per resident (261st of 351)	$21.86 per resident (270th of 351)	$21.86 per resident (271st of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2023. Every one names Lee directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"renovations to the Park Street Bridge in Lee"	Enacted names the town
FY2023	$25,000 (split two ways)	"trail linkages and trail projects, including design and construction of infrastructure, for the development of the Highlands footpath between the…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lee received 2.91 times its proportional share of competitive grant awards.

Local road miles **54.7** 231st of 351 · 9.6 per 1,000 residents (112th of 351)	Town-owned bridges, replacement cost **$29.6M** scored exposure $16M · six in poor condition	Road-stream crossings **75** 180th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.1 sq mi** 15% state-owned	Seasonal homes **10%** share of housing units	Peak service population **6,392** residents plus seasonal	Core infrastructure index **1.76** roads, culverts, dams, coast, flood, energy

Burden index 2.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,636 acres** 15.8% of land area · FY2026	State-owned land PILOT, FY2026 **$114,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$43.38** statewide $117 · FY2026	New growth per resident **$28,739** FY2017–2025 · 113th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.1% of Lee's general-fund spending in FY2025, down from 25.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **25.9%** $3.7M of $14.2M · median town 14.1%	FY2016 **22.5%** $4M of $17.8M · median town 12.2%	FY2025 **17.1%** $4.2M of $24.4M · median town 11.5%	Net of state charges, FY2025 **14.3%** FY2010: 21.8% · median town 10.0%

Lee's state aid did not keep pace with either price measure: FY2025 aid was 26.8% below its FY2006 aid grown by Boston-area consumer prices and 34.9% below grown by the government price index.

Gross state aid went from $3.7 million in FY2006 to $4.2 million in FY2025, +13.5% in dollars. Flag: in FY2010, $610,000 of Lee's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+11.0%** $2.9M to $3.2M · all towns +54.0%	All fixed costs, FY2016–25 **+21.5%** $4M to $4.9M · all towns +53.0%	Years squeezed **1 of 9** fixed costs grew faster than allowed levy growth	Health insurance **1 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lee's health insurance would have been $3.65 million in FY2025; it was $3.24 million, $406,000 below the path. Its fixed costs would have been $4.99 million in FY2025; it was $4.86 million, $135,000 below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lee came to $125,000, 39.0% of the $321,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$125,000	39.0%	28.2%
Placed in the town	$125,000	39.0%	42.3%
Everything placed	$125,000	39.0%	45.2%

SCHOOLS

Lee's required school contribution is 3.1% of median household income, 51st highest of 351.

Chapter 70 aid, FY2026 **$2.3M** to the town's district	Required local contribution **$7.3M** FY2026
Share of household income **3.1%** 51st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

EXPECTED AND ACTUAL

Lee received $7.7 million in earmarks placed in the town and competitive grants over ten years, 19% more than the $6.5 million its size, need and institutions predict.

Lee runs its own school district.

PEERS

Lee ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lee this town	**38**	**$7,783**	**$1,292**	**$21.86**	**2.91**	**3.1%**
Great Barrington peer	42	$9,461	$2,113	$175	2.92	3.7%
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Chatham peer · best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Leicester

Town · Worcester County · 11,113 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

17th Worcester · David Henry Argosky LeBoeuf 50% of residents

5th Worcester · Donald R. Berthiaume, Jr. 25% of residents

7th Worcester · Paul K. Frost 25% of residents

Leicester is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Leicester Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Leicester scores 55 on the Fairness Index for all state aid and 73 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

88th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	54	54	57

Rank under other weightings: 74th to 94th.

Weighting-dependent: the range crosses the 45–55 band

Leicester received more than its share of state aid on all four measures; its blended score of 55 stays between 54 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

73 / 100

93rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	73	73	75

Rank under other weightings: 90th to 100th.

Stable high: above 55 under every weighting

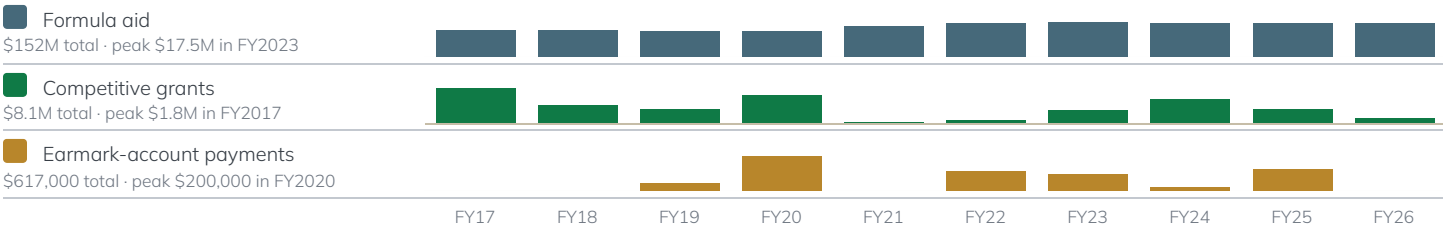
Leicester received more than its share of discretionary money on all four measures; its blended score of 73 stays between 73 and 74 under every weighting tested.

STATE MONEY, FY2017–FY2026

Leicester's town government and school districts received $152 million in formula aid and $8.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$152M	**$8.1M**	**$617,000**
$13,695 per resident (102nd of 351) · gross	$728 per resident (108th of 351)	$55.56 per resident (66th of 351)

Competitive grants to Leicester peaked in FY2017 at $1.8 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.2 million, are not shown.

EARMARKS

Leicester received $631,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$631,000	**$631,000**	**$631,000**	**Not a member**
$56.82 per resident (126th of 351)	$56.82 per resident (148th of 351)	$56.82 per resident (156th of 351)	35 municipalities had none

Placed in the town: 16 clauses in nine of ten budgets; the most recent in FY2026. Every one names Leicester directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$100,000	"the development of a water and sewer economic infrastructure feasibility study and master plan in the town of Leicester"	Enacted names the town
FY2023	$85,000	"repairs to the boiler system at the Leicester elementary school in the town of Leicester"	Enacted names the town
FY2022	$75,000	"the fire department in the town of Leicester for the purchase of extrication tools"	Enacted names the town
FY2025	$50,000	"firefighter turnout gear and emergency preparedness enhancements for the Leicester fire department"	Enacted names the town
FY2024	$50,000	"the purchase of turnout gear for the fire department in the town of Leicester"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Leicester received 1.36 times its proportional share of competitive grant awards.

Local road miles **83.9** 142nd of 351 · 7.6 per 1,000 residents (144th of 351)	Town-owned bridges, replacement cost **$13.7M** scored exposure $6M · two in poor condition	Road-stream crossings **111** 93rd of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **23.3 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **11,223** residents plus seasonal	Core infrastructure index **2.13** roads, culverts, dams, coast, flood, energy

Burden index 1.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **111 acres** 0.7% of land area · FY2026	State-owned land PILOT, FY2026 **$19,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$172** statewide $117 · FY2026	New growth per resident **$16,365** FY2017–2025 · 236th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 35.3% of Leicester's general-fund spending in FY2025, down from 45.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **45.9%** $11.2M of $24.4M · median town 14.1%	FY2016 **43.2%** $12M of $27.6M · median town 12.2%	FY2025 **35.3%** $14.1M of $39.8M · median town 11.5%	Net of state charges, FY2025 **32.5%** FY2010: 46.3% · median town 10.0%

Leicester's state aid did not keep pace with either price measure: FY2025 aid was 19.1% below its FY2006 aid grown by Boston-area consumer prices and 28.1% below grown by the government price index.

Gross state aid went from $11.2 million in FY2006 to $14.1 million in FY2025, +25.4% in dollars. Flag: in FY2010, $622,000 of Leicester's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.3%** $2.4M to $3.1M · all towns +54.0%	All fixed costs, FY2016–25 **+64.2%** $3.9M to $6.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Leicester's health insurance would have been $2.94 million in FY2025; it was $3.13 million, $198,000 above the path. Its fixed costs would have been $4.83 million in FY2025; it was $6.35 million, $1.52 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Leicester came to $601,000, 76.8% of the $784,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$601,000	76.8%	28.2%
Placed in the town	$601,000	76.8%	42.3%
Everything placed	$601,000	76.8%	45.2%

SCHOOLS

Leicester's required school contribution is 2.8% of median household income, 133rd highest of 351.

Chapter 70 aid, FY2026 **$11.4M** to the town's district	Required local contribution **$11.9M** FY2026
Share of household income **2.8%** 133rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Leicester runs its own school district.

EXPECTED AND ACTUAL

Leicester received $8.8 million in earmarks placed in the town and competitive grants over ten years, 50% more than the $5.9 million its size, need and institutions predict.

PEERS

Leicester ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Leicester this town	**55**	**$13,695**	**$728**	**$56.82**	**1.36**	**2.8%**
Granby peer	49	$12,582	$104	$26.32	0.31	2.4%
East Longmeadow peer · lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
Pepperell peer	51	$13,867	$271	$56.38	1.79	2.6%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Lenox

Town · Berkshire County · 5,079 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Berkshire · Leigh Davis

The author was a candidate for this seat in 2024.

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Lenox Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Lenox scores 32 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

289th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	33	36	30

Rank under other weightings: 262nd to 307th.

Stable low: below 45 under every weighting

Lenox received less than its share of state aid on all four measures; its blended score of 32 stays between 30 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

115th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	73	60	70

Rank under other weightings: 107th to 118th.

Stable high: above 55 under every weighting

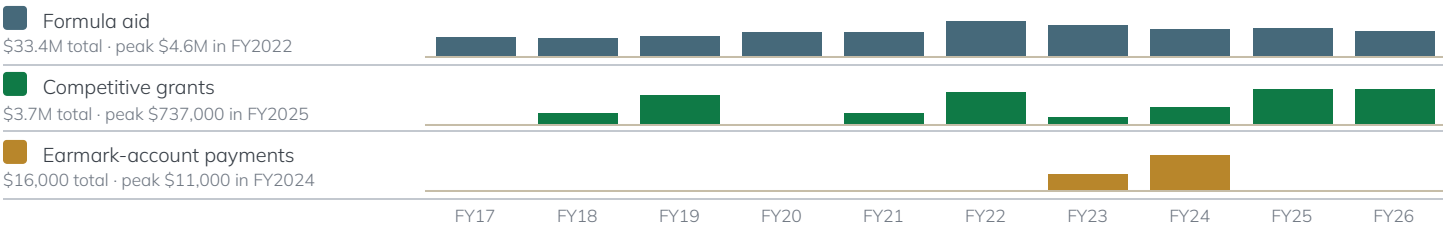
Lenox received more than its share of discretionary money on all four measures; its blended score of 69 stays between 67 and 71 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lenox's town government and school districts received $33.4 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$33.4M	**$3.7M**	**$16,000**
$6,580 per resident (313th of 351) · gross	$735 per resident (106th of 351)	$3.15 per resident (306th of 351)

Competitive grants to Lenox were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $36 million, are not shown.

EARMARKS

Lenox received $75,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$75,000	**$75,000**	**$75,000**	**Not a member**
$14.77 per resident (285th of 351)	$14.77 per resident (293rd of 351)	$14.77 per resident (294th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2025. Every one names Lenox directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$75,000	"the Berkshire County Gold Star Family Memorial in Lenox"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lenox received 1.89 times its proportional share of competitive grant

awards.

Local road miles **51.5** 245th of 351 · 10.1 per 1,000 residents (105th of 351)	Town-owned bridges, replacement cost **$14.4M** scored exposure $4.2M · none in poor condition	Road-stream crossings **75** 180th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **21.2 sq mi** 8% state-owned	Seasonal homes **16%** share of housing units	Peak service population **6,045** residents plus seasonal	Core infrastructure index **1.88** roads, culverts, dams, coast, flood, energy

Burden index 1.89; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,279 acres** 9.4% of land area · FY2026	State-owned land PILOT, FY2026 **$68,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$52.96** statewide $117 · FY2026	New growth per resident **$43,633** FY2017–2025 · 49th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.7% of Lenox's general-fund spending in FY2025, down from 21.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.4%** $3.2M of $14.9M · median town 14.1%	FY2016 **19.5%** $4M of $20.3M · median town 12.2%	FY2025 **13.7%** $3.9M of $28.6M · median town 11.5%	Net of state charges, FY2025 **12.6%** FY2010: 21.2% · median town 10.0%

Lenox's state aid did not keep pace with either price measure: FY2025 aid was 20.4% below its FY2006 aid grown by Boston-area consumer prices and 29.3% below grown by the government price index.

Gross state aid went from $3.2 million in FY2006 to $3.9 million in FY2025, +23.4% in dollars. Flag: in FY2010, $1.3 million of Lenox's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+31.1%** $3.4M to $4.5M · all towns +54.0%	All fixed costs, FY2016–25 **+57.1%** $3.6M to $5.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lenox's health insurance would have been $4.30 million in FY2025; it was $4.52 million, $215,000 above the path. Its fixed costs would have been $4.55 million in FY2025; it was $5.72 million, $1.17 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+36%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lenox came to $75,000, 7.0% of the $1.07 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$75,000	7.0%	28.2%
Placed in the town	$75,000	7.0%	42.3%
Everything placed	$75,000	7.0%	45.2%

SCHOOLS

Lenox's required school contribution is 2.1% of median household income, 300th highest of 351.

Chapter 70 aid, FY2026 **$1.5M** to the town's district	Required local contribution **$5.4M** FY2026
Share of household income **2.1%** 300th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+5%** after inflation

Lenox runs its own school district.

EXPECTED AND ACTUAL

Lenox received $4.6 million in earmarks placed in the town and competitive grants over ten years, 91% of the $5.1 million its size, need and institutions predict.

PEERS

Lenox ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lenox this town	**32**	**$6,580**	**$735**	**$14.77**	**1.89**	**2.1%**
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%
Orleans peer	26	$4,954	$820	$115	1.26	1.7%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Tisbury peer · lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

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WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Leominster

City · Worcester County · 43,909 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
4th Worcester · Natalie M. Higgins	Worcester and Middlesex · John J. Cronin	Leominster Public Schools, the city's own district	Montachusett Regional Planning Commission

FAIRNESS INDEX

Leominster scores 58 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100

61st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	51	57	63

Rank under other weightings: 49th to 76th.

Stable high: above 55 under every weighting

Leominster received more than its share of state aid on all four measures; its blended score of 58 stays between 56 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

189th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	42	53	54

Rank under other weightings: 173rd to 195th.

Near fair: between 45 and 55 under every weighting

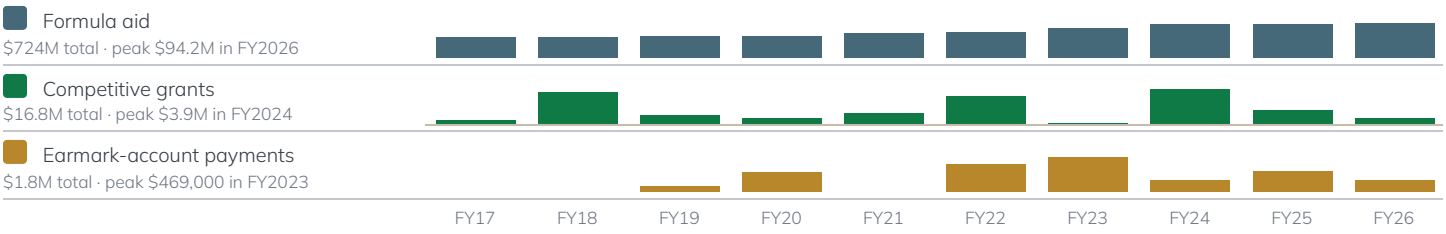
Leominster received more than its share of discretionary money on three of four measures; its blended score of 50 stays between 48 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Leominster's town government and school districts received $724 million in formula aid and $16.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$724M	$16.8M	$1.8M
$16,497 per resident (54th of 351) · gross	$382 per resident (179th of 351)	$41.75 per resident (104th of 351)

Competitive grants to Leominster peaked in FY2024 at $3.9 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $32.3 million, are not shown.

EARMARKS

Leominster received $2.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.4M	$2.4M	$2.4M	Not a member
$54.84 per resident (130th of 351)	$54.84 per resident (154th of 351)	$54.84 per resident (161st of 351)	35 municipalities had none

Placed in the town: 42 clauses in nine of ten budgets; the most recent in FY2026. Every one names Leominster directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$500,000	"the United Way of North Central Massachusetts for the Leominster Flood Relief Fund to reimburse Leominster residents for damages related to severe..."	Enacted names the town
FY2025	$150,000	"NewVue Communities, Inc. and RCAP Solutions, Inc. for the purposes of launching a pilot program to address systemic challenges to accessing..."	Enacted names the town
FY2026	$100,000	"Friends of Sholan Farms, Inc. in the city of Leominster for on-farm infrastructure, land management and maintenance costs"	Enacted names the town
FY2021	$100,000	"renovations and updates to the Leominster senior center in the town of Leominster"	Enacted names the town
FY2020	$83,000 (split three ways)	"not less than $250,000 shall be obligated for contracts with the Veteran Homestead, Inc. in the cities of Leominster, Gardner and Fitchburg"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Leominster received 1.58 times its proportional share of competitive grant awards.

Local road miles **163.8** 26th of 351 · 3.7 per 1,000 residents (290th of 351)	Town-owned bridges, replacement cost **$46.2M** scored exposure $18.6M · two in poor condition	Road-stream crossings **110** 98th of 351 · culverts and small crossings	Town-owned hazard dams **8** high or significant hazard
Land area **28.8 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **44,057** residents plus seasonal	Core infrastructure index **1.22** roads, culverts, dams, coast, flood, energy

Burden index 1.58; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,453 acres** 7.9% of land area · FY2026	State-owned land PILOT, FY2026 **$269,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$185** statewide $117 · FY2026	New growth per resident **$13,549** FY2017–2025 · 274th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 44.4% of Leominster's general-fund spending in FY2025, up from 44.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **44.2%** $41.4M of $93.7M · median town 14.1%	FY2016 **42.4%** $51.1M of $121M · median town 12.2%	FY2025 **44.4%** $76.9M of $173M · median town 11.5%	Net of state charges, FY2025 **42.1%** FY2010: 41.2% · median town 10.0%

Leominster's state aid kept pace with both price measures: FY2025 aid was 19.9% above its FY2006 aid grown by Boston-area consumer prices and 6.6% above grown by the government price index.

Gross state aid went from $41.4 million in FY2006 to $76.9 million in FY2025, +86.0% in dollars. Flag: in FY2010, $1.7 million of Leominster's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+71.3%** $21.2M to $36.4M · all towns +54.0%	All fixed costs, FY2016–25 **+41.0%** $25.3M to $35.7M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Leominster's health insurance would have been $26.5 million in FY2025; it was $36.4 million, $9.86 million above the path. Its fixed costs would have been $31.6 million in FY2025; it was $35.7 million, $4.09 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+31%); health insurance changed by more than 30% in one year in FY2024 (+35%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2022, FY2023, FY2024 and FY2025 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Leominster came to $2.1 million, 13.9% of the $15.1 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.1M	13.9%	28.2%
Placed in the town	$2.1M	13.9%	42.3%
Everything placed	$2.1M	13.9%	45.2%

SCHOOLS

Leominster's required school contribution is 2.5% of median household income, 229th highest of 351.

Chapter 70 aid, FY2026 **$72.7M** to the town's district	Required local contribution **$38.6M** FY2026
Share of household income **2.5%** 229th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Leominster runs its own school district.

EXPECTED AND ACTUAL

Leominster received $19.7 million in earmarks placed in the town and competitive grants over ten years, 95% of the $20.8 million its size, need and institutions predict.

PEERS

Leominster ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Leominster this town	**58**	**$16,497**	**$382**	**$54.84**	**1.58**	**2.5%**
Westfield peer	52	$14,111	$235	$64.11	0.63	2.6%
Taunton peer	59	$17,881	$149	$94.33	0.82	2.7%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Belchertown lowest in class of 30	49	$13,722	$401	$15.27	2.92	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Leverett

Town · Franklin County · 1,608 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Leverett Public Schools, the town's own district
Amherst-Pelham Regional School District, shared with Amherst, Pelham and Shutesbury

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Leverett scores 47 on the Fairness Index for all state aid and 87 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

148th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	50	49	38

Rank under other weightings: 122nd to 166th.

Near fair: between 45 and 55 under every weighting

Leverett received less than its share of state aid on three of four measures; its blended score of 47 stays between 45 and 49 under every weighting tested.

DISCRETIONARY MONEY ONLY

87 / 100

50th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
89	89	85	83

Rank under other weightings: 47th to 58th.

Stable high: above 55 under every weighting

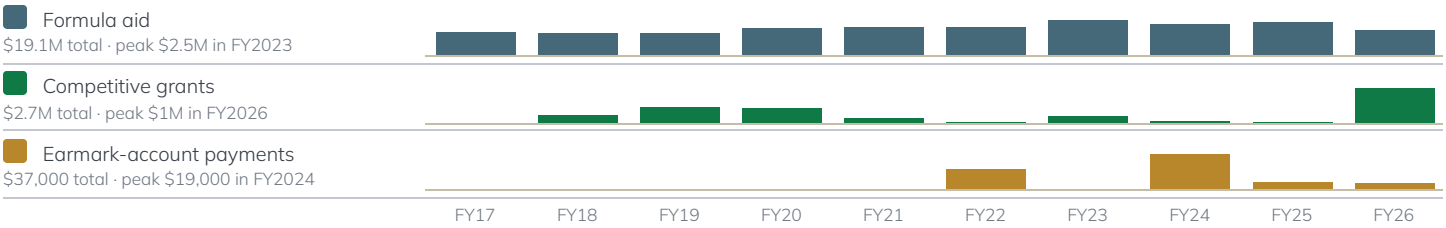
Leverett received more than its share of discretionary money on all four measures; its blended score of 87 stays between 85 and 88 under every weighting tested.

STATE MONEY, FY2017–FY2026

Leverett's town government and school districts received $19.1 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$19.1M	**$2.7M**	**$37,000**
$11,884 per resident (130th of 351) · gross	$1,674 per resident (54th of 351)	$23.23 per resident (183rd of 351)

Competitive grants to Leverett peaked in FY2026 at $1 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

Leverett received $215,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$215,000	**$215,000**	**$215,000**	**Not a member**
$134 per resident (22nd of 351)	$134 per resident (38th of 351)	$134 per resident (42nd of 351)	35 municipalities had none

Placed in the town: three clauses in two of ten budgets; the most recent in FY2023. Every one names Leverett directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"the Friends of Leverett Pond for the repair, design, permitting and construction of the Leverett Pond dam"	Enacted names the town
FY2019	$100,000	"the town of Leverett for rehabilitation of the Leverett Crafts and Arts Building"	Enacted names the town
FY2023	$15,000	"the town of Leverett for its 250th anniversary"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Leverett received 1.95 times its proportional share of competitive grant awards.

Local road miles **33.7** 320th of 351 · 20.9 per 1,000 residents (55th of 351)	Town-owned bridges, replacement cost **$8.9M** scored exposure $3.8M · three in poor condition	Road-stream crossings **67** 206th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.8 sq mi** 4% state-owned	Seasonal homes **4%** share of housing units	Peak service population **1,677** residents plus seasonal	Core infrastructure index **5.86** roads, culverts, dams, coast, flood, energy

Burden index 1.95; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **672 acres** 4.6% of land area · FY2026	State-owned land PILOT, FY2026 **$29,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$42.67** statewide $117 · FY2026	New growth per resident **$30,491** FY2017–2025 · 104th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.4% of Leverett's general-fund spending in FY2025, up from 11.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $514,000 of $4.6M · median town 14.1%	FY2016 **12.1%** $661,000 of $5.5M · median town 12.2%	FY2025 **11.4%** $857,000 of $7.5M · median town 11.5%	Net of state charges, FY2025 **11.2%** FY2010: 11.3% · median town 10.0%

Leverett's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $827,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Leverett's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 7.5% above its FY2006 aid grown by Boston-area consumer prices and 4.4% below grown by the government price index.

Gross state aid went from $514,000 in FY2006 to $857,000 in FY2025, +66.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+185.0%** $71,000 to $202,000 · all towns +54.0%	All fixed costs, FY2016–25 **+79.1%** $217,000 to $389,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Leverett's health insurance would have been $88,000 in FY2025; it was $202,000, $113,000 above the path. Its fixed costs would have been $271,000 in FY2025; it was $389,000, $118,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2021 (+41%) and FY2023 (+52%); fixed costs changed by more than 30% in one year in FY2023 (+49%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Leverett came to $215,000, 164.1% of the $131,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$215,000	164.1%	28.2%
Placed in the town	$215,000	164.1%	42.3%
Everything placed	$215,000	164.1%	45.2%

SCHOOLS

Leverett's required school contribution is 2.9% of

EXPECTED AND ACTUAL

Leverett received $3 million in earmarks placed in the town and competitive grants over ten years, 53% of the $5.8 million its size, need and institutions predict.

median household income, 90th highest of 351.

Chapter 70 aid, FY2026 **$1.1M** to the town's district	Required local contribution **$2.2M** FY2026
Share of household income **2.9%** 90th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–0%** after inflation

Leverett runs its own district for some grades and belongs to Amherst-Pelham for others; Leverett accounts for 7% of that district's foundation budget.

PEERS

Leverett ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Leverett this town	**47**	**$11,884**	**$1,674**	**$134**	**1.95**	**2.9%**
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Lexington

Town · Middlesex County · 34,295 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

15th Middlesex · Michelle L. Ciccolo
89% of residents
21st Middlesex · Kenneth I. Gordon
11% of residents

Lexington is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fourth Middlesex · Cindy F. Friedman 66% of residents
Third Middlesex · Michael J. Barrett 34% of residents

SCHOOL DISTRICTS

Lexington Public Schools, the town's own district
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Concord, Dover, Lancaster, Needham and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Lexington scores 36 on the Fairness Index for all state aid and 12 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100
250th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	58	24	28

Rank under other weightings: 205th to 282nd.

Stable low: below 45 under every weighting

Lexington received less than its share of state aid on three of four measures; its blended score of 36 stays between 30 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

12 / 100
342nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
10	21	10	7

Rank under other weightings: 337th to 345th.

Stable low: below 45 under every weighting

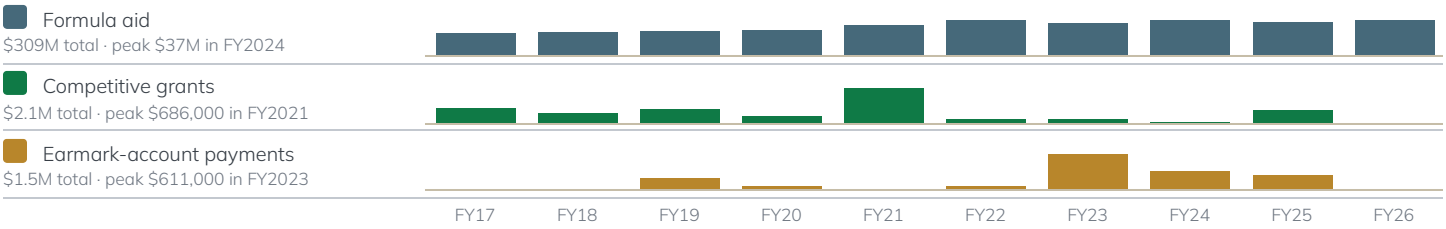
Lexington received less than its share of discretionary money on all four measures; its blended score of 12 stays between 10 and 14 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lexington's town government and school districts received $309 million in formula aid and $2.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$309M	$2.1M	$1.5M
$9,001 per resident (222nd of 351) · gross	$61.92 per resident (345th of 351)	$44.46 per resident (91st of 351)

Competitive grants to Lexington peaked in FY2021 at $686,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $23.1 million, are not shown.

EARMARKS

Lexington received $1.4 million in local earmarks naming the town, $3.9 million placed in the town and $3.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.4M	$3.9M	$3.9M	Not a member
$40.50 per resident (185th of 351)	$113 per resident (55th of 351)	$113 per resident (61st of 351)	35 municipalities had none

Placed in the town: 32 clauses in ten of ten budgets; the most recent in FY2026. $1.4 million came in clauses that name Lexington; the other $2.5 million went to organizations based in Lexington, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$350,000	"the NAN Project in the town of Lexington to increase mental health awareness and suicide prevention programming in schools and communities"	Enacted names the town
FY2026	$250,000	"not less than $250,000 for the assisted outpatient treatment program at Eliot Community Human Services, Inc. to treat residents who suffer from..."	Enacted recipient based here
FY2025	$250,000	"not less than $250,000 for the assisted outpatient treatment program at Eliot Community Human Services, Inc. to treat residents who suffer from..."	Enacted recipient based here
FY2024	$250,000	"not less than $250,000 for the assisted outpatient treatment program at Eliot Community Human Services, Inc. to treat residents who suffer from..."	Enacted recipient based here
FY2023	$250,000	"not less than $250,000 for the assisted outpatient treatment program at Eliot Community Human Services, Inc. to treat residents who suffer from..."	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Lexington received 57% of its proportional share of competitive grant awards.

Local road miles **132.0** 48th of 351 · 3.8 per 1,000 residents (284th of 351)	Town-owned bridges, replacement cost **$4.9M** scored exposure $2.4M · none in poor condition	Road-stream crossings **95** 128th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **16.4 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **34,358** residents plus seasonal	Core infrastructure index **1.08** roads, culverts, dams, coast, flood, energy

Burden index 0.57; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$65,023** FY2017–2025 · 21st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.3% of Lexington's general-fund spending in FY2025, up from 6.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.6%** $8.6M of $131M · median town 14.1%	FY2016 **6.5%** $11.6M of $177M · median town 12.2%	FY2025 **7.3%** $20.5M of $279M · median town 11.5%	Net of state charges, FY2025 **6.9%** FY2010: 6.2% · median town 10.0%

Lexington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $309,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lexington's state aid kept pace with both price measures: FY2025 aid was 53.3% above its FY2006 aid grown by Boston-area consumer prices and 36.2% above grown by the government price index.

Gross state aid went from $8.6 million in FY2006 to $20.5 million in FY2025, +137.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+58.2%** $22.8M to $36M · all towns +54.0%	All fixed costs, FY2016–25 **+65.2%** $29.3M to $48.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lexington's health insurance would have been $28.5 million in FY2025; it was $36 million, $7.58 million above the path. Its fixed costs would have been $36.6 million in FY2025; it was $48.4 million, $11.8 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2021 (–66%) and FY2023 (+168%); health insurance changed by more than 30% in one year in FY2021 (–87%) and FY2023 (+745%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lexington came to $1.2 million, 9.1% of the $13.3 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.2M	9.1%	28.2%
Placed in the town	$3.5M	26.1%	42.3%
Everything placed	$3.5M	26.1%	45.2%

SCHOOLS

Lexington's required school contribution is 2.7% of median household income, 162nd highest of 351.

Chapter 70 aid, FY2026 **$19.7M** to the town's district	Required local contribution **$79.6M** FY2026
Share of household income **2.7%** 162nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Lexington runs its own school district and also belongs to Minuteman; Lexington accounts for 14% of that district's foundation budget.

EXPECTED AND ACTUAL

Lexington received $7.2 million in earmarks placed in the town and competitive grants over ten years, 52% of the $13.7 million its size, need and institutions predict.

PEERS

Lexington ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lexington this town	**36**	**$9,001**	**$61.92**	**$113**	**0.57**	**2.7%**
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Needham peer	28	$6,664	$33.58	$150	0.21	2.5%
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Leyden

Town · Franklin County · 637 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Pioneer Valley Regional School District, shared with Bernardston and Northfield
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Leyden scores 52 on the Fairness Index for all state aid and 93 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

107th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	54	48	49

Rank under other weightings: 96th to 118th.

Near fair: between 45 and 55 under every weighting

Leyden received less than its share of state aid on two of four measures; its blended score of 52 stays between 50 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

93 / 100

33rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	94	90	93

Rank under other weightings: 30th to 36th.

Stable high: above 55 under every weighting

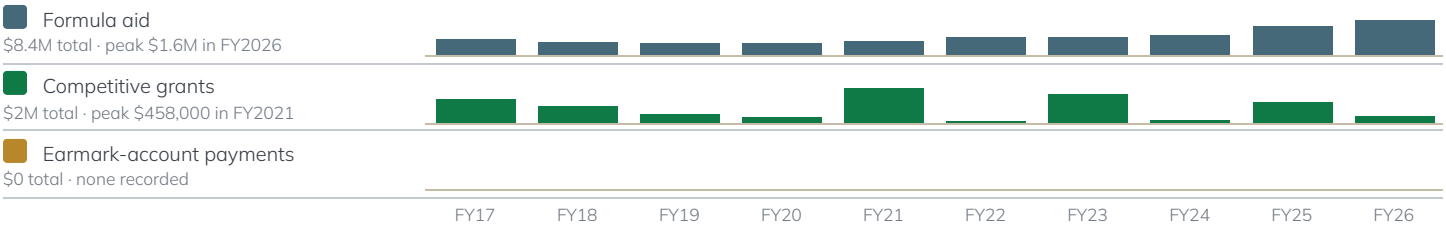
Leyden received more than its share of discretionary money on all four measures; its blended score of 93 stays between 92 and 94 under every weighting tested.

STATE MONEY, FY2017–FY2026

Leyden's town government and school districts received $8.4 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$8.4M	$2M	$0
$13,247 per resident (107th of 351) · gross	$3,201 per resident (30th of 351)	$0 per resident (339th of 351)

Competitive grants to Leyden peaked in FY2021 at $458,000, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 637 residents, a single payment moves Leyden's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.5 million, are not shown.

EARMARKS

Leyden received $100,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$100,000	$100,000	$100,000	Not a member
$157 per resident (13th of 351)	$157 per resident (18th of 351)	$157 per resident (26th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2024. Every one names Leyden directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the town of Leyden to support municipal vehicles and equipment for municipal departments"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Leyden received 2.17 times its proportional share of competitive grant awards.

Local road miles **35.1** 314th of 351 · 55.0 per 1,000 residents (21st of 351)	Town-owned bridges, replacement cost **$4.2M** scored exposure $532,000 · none in poor condition	Road-stream crossings **56** 240th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **17.9 sq mi** 8% state-owned	Seasonal homes **9%** share of housing units	Peak service population **705** residents plus seasonal	Core infrastructure index **2.90** roads, culverts, dams, coast, flood, energy

Burden index 2.17; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **868 acres** 7.6% of land area · FY2026	State-owned land PILOT, FY2026 **$47,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$54.23** statewide $117 · FY2026	New growth per resident **$13,624** FY2017–2025 · 270th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.0% of Leyden's general-fund spending in FY2025, up from 5.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.4%** $80,000 of $1.5M · median town 14.1%	FY2016 **6.6%** $109,000 of $1.7M · median town 12.2%	FY2025 **7.0%** $161,000 of $2.3M · median town 11.5%	Net of state charges, FY2025 **6.9%** FY2010: 5.2% · median town 10.0%

Leyden's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $649,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Leyden's state aid kept pace with both price measures: FY2025 aid was 28.7% above its FY2006 aid grown by Boston-area consumer prices and 14.4% above grown by the government price index.

Gross state aid went from $80,000 in FY2006 to $161,000 in FY2025, +99.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 **+56.1%** $104,000 to $162,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 3** years it grew faster than allowed levy growth · six years not reported

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Leyden's fixed costs would have been $130,000 in FY2025; it was $162,000, $32,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (–72%) and FY2021 (+340%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Leyden's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$100,000	not reported	28.2%
Placed in the town	$100,000	not reported	42.3%
Everything placed	$100,000	not reported	45.2%

SCHOOLS

Leyden's required school contribution is 2.2% of

EXPECTED AND ACTUAL

Leyden received $2.4 million in earmarks placed in the town and competitive grants over ten years, 29% more than the $1.9 million its size, need and institutions predict.

median household income, 291st highest of 351.

Chapter 70 aid, FY2026 **$761,000** attributed to the town	Required local contribution **$630,000** FY2026
Share of household income **2.2%** 291st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+103%** after inflation

Leyden has no school district of its own. Its pupils attend Pioneer and Franklin County; Leyden accounts for 13% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Leyden ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Leyden this town	**52**	**$13,247**	**$3,201**	**$157**	**2.17**	**2.2%**
Florida peer · lowest in class of 30	64	$19,543	$1,744	$0	0.14	3.2%
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
Heath peer	70	$20,313	$6,568	$65.36	0.84	1.5%
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Lincoln

Town · Middlesex County · 6,948 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Middlesex · Carmine Lawrence Gentile
50% of residents
14th Norfolk · Alice Hanlon Peisch
50% of residents
Lincoln is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Lincoln Public Schools, the town's own district
Lincoln-Sudbury Regional School District, shared with Sudbury

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Lincoln scores 41 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100
203rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	61	40	28

Rank under other weightings: 153rd to 236th.

Weighting-dependent: the range crosses the 45–55 band

Lincoln received less than its share of state aid on three of four measures; its blended score of 41 stays between 36 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100
146th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	77	58	45

Rank under other weightings: 128th to 169th.

Weighting-dependent: the range crosses the 45–55 band

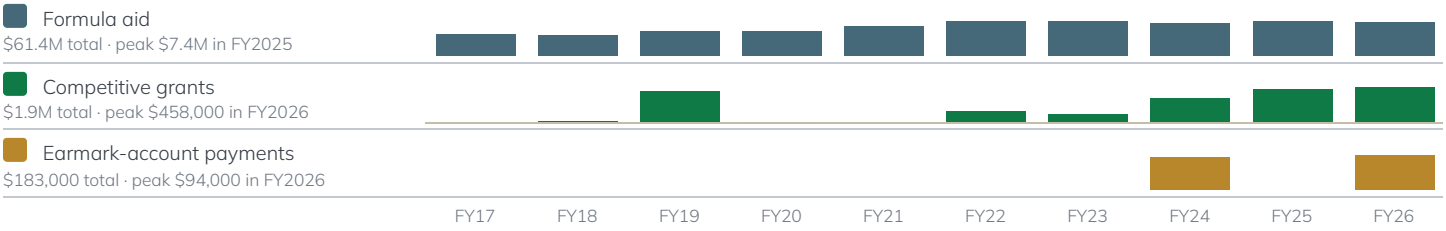
Lincoln received more than its share of discretionary money on three of four measures; its blended score of 59 stays between 54 and 64 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lincoln's town government and school districts received $61.4 million in formula aid and $1.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$61.4M	**$1.9M**	**$183,000**
$8,832 per resident (226th of 351) · gross	$272 per resident (219th of 351)	$26.29 per resident (167th of 351)

Competitive grants to Lincoln peaked in FY2026 at $458,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.1 million, are not shown.

EARMARKS

Lincoln received $1.6 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.6M	**$1.6M**	**$1.6M**	**Not a member**
$223 per resident (5th of 351)	$223 per resident (8th of 351)	$223 per resident (14th of 351)	35 municipalities had none

Placed in the town: 18 clauses in ten of ten budgets; the most recent in FY2026. Every one names Lincoln directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$150,000	"the town of Lincoln to mitigate the costs of educating the children of retired-military families"	Enacted names the town
FY2025	$150,000	"the town of Lincoln to mitigate the costs of educating the children of retired-military families"	Enacted names the town
FY2024	$150,000	"the town of Lincoln to mitigate the costs of educating the children of retired-military families"	Enacted names the town
FY2023	$150,000	"the town of Lincoln to mitigate the costs of educating the children of retired-military families"	Enacted names the town
FY2022	$150,000	"the town of Lincoln to mitigate the costs of educating the children of retired-military families"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lincoln received 1.39 times its proportional share of competitive grant awards.

Local road miles **52.4** 241st of 351 · 7.5 per 1,000 residents (145th of 351)	Town-owned bridges, replacement cost **$445,000** scored exposure $137,000 · none in poor condition	Road-stream crossings **46** 279th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.2 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **6,948** residents plus seasonal	Core infrastructure index **1.49** roads, culverts, dams, coast, flood, energy

Burden index 1.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **255 acres** 2.8% of land area · FY2026	State-owned land PILOT, FY2026 **$626,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,454** statewide $117 · FY2026	New growth per resident **$12,248** FY2017–2025 · 289th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.7% of Lincoln's general-fund spending in FY2025, down from 11.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $2.6M of $23.3M · median town 14.1%	FY2016 **5.8%** $1.8M of $31.5M · median town 12.2%	FY2025 **6.7%** $2.9M of $44M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 6.0% · median town 10.0%

Lincoln's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $491,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lincoln's state aid did not keep pace with either price measure: FY2025 aid was 28.0% below its FY2006 aid grown by Boston-area consumer prices and 36.0% below grown by the government price index.

Gross state aid went from $2.6 million in FY2006 to $2.9 million in FY2025, +11.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+28.3%** $3.2M to $4.1M · all towns +54.0%	All fixed costs, FY2016–25 **+41.0%** $5.2M to $7.4M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lincoln's health insurance would have been $4.04 million in FY2025; it was $4.15 million, $109,000 above the path. Its fixed costs would have been $6.53 million in FY2025; it was $7.37 million, $844,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lincoln came to $1.3 million, 146.1% of the $914,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.3M	146.1%	28.2%
Placed in the town	$1.3M	146.1%	42.3%
Everything placed	$1.3M	146.1%	45.2%

SCHOOLS

Lincoln's required school contribution is 1.9% of median household income, 318th highest of 351.

Chapter 70 aid, FY2026 **$2M** to the town's district	Required local contribution **$9M** FY2026
Share of household income **1.9%** 318th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Lincoln runs its own district for some grades and belongs to Lincoln-Sudbury for others; Lincoln accounts for 13% of that district's foundation budget.

EXPECTED AND ACTUAL

Lincoln received $9.6 million in earmarks placed in the town and competitive grants over ten years, 53% more than the $6.3 million its size, need and institutions predict.

PEERS

Lincoln ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lincoln this town	**41**	**$8,832**	**$272**	**$223**	**1.39**	**1.9%**
Cohasset peer · best in class of 30	33	$7,092	$383	$129	0.76	2.5%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Newbury peer	41	$8,033	$339	$38.77	0.19	1.6%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Littleton

Town · Middlesex County · 10,280 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Middlesex · James Arciero

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Littleton Public Schools, the town's own district

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Groton, Pepperell, Shirley, Townsend and Westford

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Littleton scores 37 on the Fairness Index for all state aid and 89 for discretionary money. Fifty is a fair share.

ALL STATE AID

37 / 100

246th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	51	32	28

Rank under other weightings: 217th to 263rd.

Stable low: below 45 under every weighting

Littleton received less than its share of state aid on three of four measures; its blended score of 37 stays between 33 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

89 / 100

44th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
90	94	89	85

Rank under other weightings: 38th to 48th.

Stable high: above 55 under every weighting

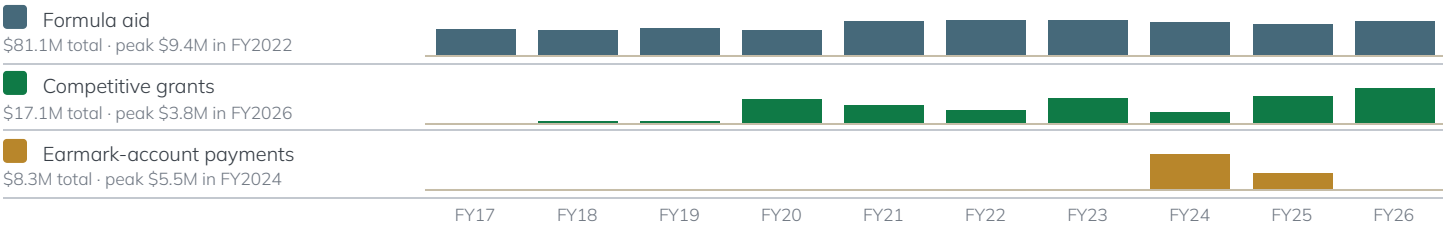
Littleton received more than its share of discretionary money on all four measures; its blended score of 89 stays between 88 and 91 under every weighting tested.

STATE MONEY, FY2017–FY2026

Littleton's town government and school districts received $81.1 million in formula aid and $17.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$81.1M	**$17.1M**	**$8.3M**
$7,885 per resident (259th of 351) · gross	$1,660 per resident (55th of 351)	$808 per resident (1st of 351)

Competitive grants to Littleton peaked in FY2026 at $3.8 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.8 million, are not shown.

EARMARKS

Littleton received $645,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$645,000	**$645,000**	**$645,000**	**Not a member**
$62.74 per resident (108th of 351)	$62.74 per resident (136th of 351)	$62.74 per resident (142nd of 351)	35 municipalities had none

Placed in the town: ten clauses in eight of ten budgets; the most recent in FY2026. Every one names Littleton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$110,000	"install solar panels on the roof of the Reuben Hoar library in the town of Littleton"	Enacted names the town
FY2025	$100,000	"the purchase and installation of solar panels for the senior center in Littleton"	Enacted names the town
FY2022	$100,000	"the installation of a sidewalk on Harwood avenue in the town of Littleton"	Enacted names the town
FY2026	$60,000	"updating the 2019 Littleton Common Revitalization Road Map"	Enacted names the town
FY2022	$50,000	"the renovation of the World War I monument at the corner of King street and Shattuck street and for the marking of veterans graves at the Westlawn…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Littleton received 5.22 times its proportional share of competitive grant awards.

Local road miles **66.0** 199th of 351 · 6.4 per 1,000 residents (179th of 351)	Town-owned bridges, replacement cost **$1.6M** scored exposure $518,000 · none in poor condition	Road-stream crossings **72** 191st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.5 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **10,381** residents plus seasonal	Core infrastructure index **2.17** roads, culverts, dams, coast, flood, energy

Burden index 5.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **96 acres** 0.9% of land area · FY2026	State-owned land PILOT, FY2026 **$10,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$105** statewide $117 · FY2026	New growth per resident **$52,342** FY2017–2025 · 32nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.5% of Littleton's general-fund spending in FY2025, down from 14.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.0%** $4M of $28.5M · median town 14.1%	FY2016 **14.1%** $5.2M of $36.9M · median town 12.2%	FY2025 **11.5%** $6.7M of $58.1M · median town 11.5%	Net of state charges, FY2025 **9.4%** FY2010: 13.6% · median town 10.0%

Littleton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $208,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Littleton's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 8.1% above its FY2006 aid grown by Boston-area consumer prices and 3.9% below grown by the government price index.

Gross state aid went from $4 million in FY2006 to $6.7 million in FY2025, +67.6% in dollars. Flag: in FY2010, $1.1 million of Littleton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.4%** $3.3M to $5.1M · all towns +54.0%	All fixed costs, FY2016–25 **+91.1%** $4.9M to $9.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Littleton's health insurance would have been $4.17 million in FY2025; it was $5.15 million, $983,000 above the path. Its fixed costs would have been $6.07 million in FY2025; it was $9.28 million, $3.21 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+45%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Littleton came to $585,000, 32.3% of the $1.81 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$585,000	32.3%	28.2%
Placed in the town	$585,000	32.3%	42.3%
Everything placed	$585,000	32.3%	45.2%

SCHOOLS

Littleton's required school contribution is 3.1% of median household income, 59th highest of 351.

Chapter 70 aid, FY2026 **$5.4M** to the town's district	Required local contribution **$17.5M** FY2026
Share of household income **3.1%** 59th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Littleton runs its own school district and also belongs to Nashoba Valley; Littleton accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Littleton received $18.1 million in earmarks placed in the town and competitive grants over ten years, 3.8 times the $4.8 million its size, need and institutions predict.

PEERS

Littleton ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Littleton this town	**37**	**$7,885**	**$1,660**	**$62.74**	**5.22**	**3.1%**
Stow peer	33	$7,771	$488	$90.02	2.17	2.4%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Freetown peer · best in class of 30	44	$10,093	$164	$147	0.30	2.8%
Rowley peer	41	$9,213	$259	$26.57	0.42	2.7%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Longmeadow

Town · Hampden County · 15,696 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
2nd Hampden · Brian M. Ashe	**Hampden, Hampshire and Worcester** · Jacob R. Oliveira	**Longmeadow Public Schools**, the town's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

Longmeadow scores 28 on the Fairness Index for all state aid and 19 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

331st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	39	23	19

Rank under other weightings: 306th to 344th.

Stable low: below 45 under every weighting

Longmeadow received less than its share of state aid on all four measures; its blended score of 28 stays between 24 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

19 / 100

318th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
18	25	22	11

Rank under other weightings: 311th to 328th.

Stable low: below 45 under every weighting

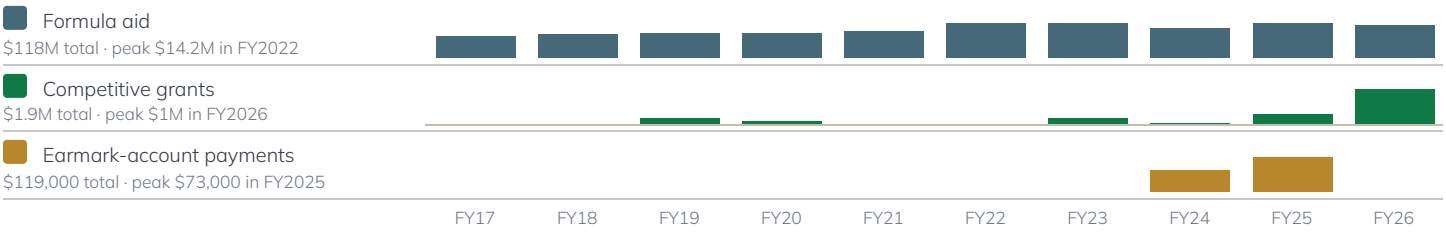
Longmeadow received less than its share of discretionary money on all four measures; its blended score of 19 stays between 16 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Longmeadow's town government and school districts received $118 million in formula aid and $1.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$118M	**$1.9M**	**$119,000**
$7,493 per resident (275th of 351) · gross	$122 per resident (310th of 351)	$7.57 per resident (270th of 351)

Competitive grants to Longmeadow peaked in FY2026 at $1 million, 53% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8 million, are not shown.

EARMARKS

Longmeadow received $582,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$582,000	**$582,000**	**$582,000**	**Not a member**
$37.08 per resident (201st of 351)	$37.08 per resident (214th of 351)	$37.08 per resident (217th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2025. Every one names Longmeadow directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"Bay Path University in the town of Longmeadow to support the introduction of the Closing Regional Workforce Gaps in Education and Healthcare Through..."	Enacted names the town
FY2019	$100,000	"the Willie Ross School for the Deaf, Inc. in the town of Longmeadow"	Enacted names the town
FY2024	$60,000	"the JGS Lifecare Corporation in the town of Longmeadow to support unit renovations and nurse call system technology"	Enacted names the town
FY2022	$50,000	"Bay Path University in the town of Longmeadow to support a college-readiness bootcamp to prepare young women for college"	Enacted names the town
FY2020	$50,000	"the town of Longmeadow for the purchase of an emergency generator for the new Longmeadow Adult Center which will also be used as an emergency shelter"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Longmeadow received 57% of its proportional share of competitive grant awards.

Local road miles **91.5** 118th of 351 · 5.8 per 1,000 residents (199th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **39** 296th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **9.1 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,696** residents plus seasonal	Core infrastructure index **0.84** roads, culverts, dams, coast, flood, energy

Burden index 0.57; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$7,354** FY2017–2025 · 344th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.8% of Longmeadow's general-fund spending in FY2025, down from 15.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.4%** $6.6M of $42.9M · median town 14.1%	FY2016 **10.8%** $6.2M of $57.7M · median town 12.2%	FY2025 **11.8%** $9.6M of $81.4M · median town 11.5%	Net of state charges, FY2025 **11.3%** FY2010: 12.4% · median town 10.0%

Longmeadow's state aid did not keep pace with either price measure: FY2025 aid was 6.3% below its FY2006 aid grown by Boston-area consumer prices and 16.8% below grown by the government price index.

Gross state aid went from $6.6 million in FY2006 to $9.6 million in FY2025, +45.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+47.7%** $6.8M to $10M · all towns +54.0%	All fixed costs, FY2016–25 **+48.1%** $7.8M to $11.6M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Longmeadow's health insurance would have been $8.45 million in FY2025; it was $10.00 million, $1.54 million above the path. Its fixed costs would have been $9.76 million in FY2025; it was $11.6 million, $1.82 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Longmeadow came to $582,000, 18.0% of the $3.23 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$582,000	18.0%	28.2%
Placed in the town	$582,000	18.0%	42.3%
Everything placed	$582,000	18.0%	45.2%

SCHOOLS

Longmeadow's required school contribution is 3.4% of median household income, 22nd highest of 351.

Chapter 70 aid, FY2026 **$7.8M** to the town's district	Required local contribution **$28.7M** FY2026
Share of household income **3.4%** 22nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+29%** after inflation

Longmeadow runs its own school district.

EXPECTED AND ACTUAL

Longmeadow received $3.1 million in earmarks placed in the town and competitive grants over ten years, 51% of the $6 million its size, need and institutions predict.

PEERS

Longmeadow ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Longmeadow this town	**28**	**$7,493**	**$122**	**$37.08**	**0.57**	**3.4%**
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Wilmington peer	42	$9,651	$202	$31.68	0.32	2.7%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Lowell

City · Middlesex County · 118,368 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

18th Middlesex · Tara T. Hong 37% of residents
17th Middlesex · Vanna Howard (until taking the First Middlesex Senate seat in March 2026; seat vacant) 35% of residents
16th Middlesex · Rodney M. Elliott 28% of residents

Lowell is split among three House districts. Shares are of 2020 residents.

STATE SENATE

First Middlesex · Vanna Howard (since March 2026) and Edward J. Kennedy (until October 2025)

SCHOOL DISTRICTS

Lowell Public Schools, the city's own district
Greater Lowell Regional Vocational Technical School District, vocational, shared with Dracut, Dunstable and Tyngsborough

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Lowell scores 70 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

70 / 100

12th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	62	68	78

Rank under other weightings: 11th to 14th.

Stable high: above 55 under every weighting

Lowell received more than its share of state aid on all four measures; its blended score of 70 stays between 67 and 73 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100

171st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	41	58	60

Rank under other weightings: 149th to 190th.

Weighting-dependent: the range crosses the 45–55 band

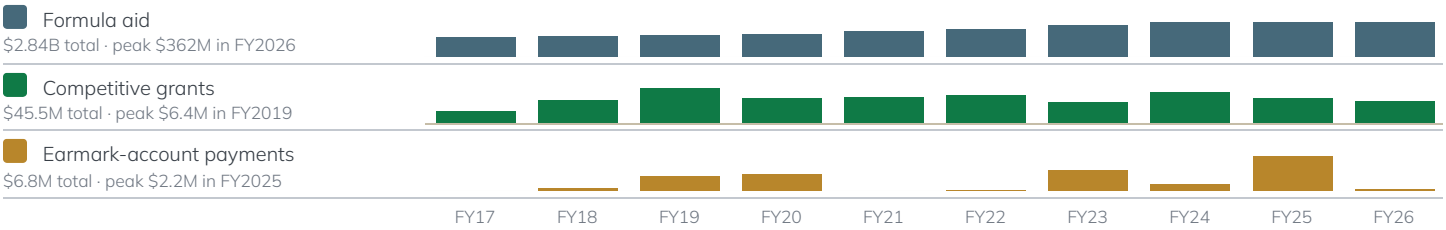
Lowell received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 49 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lowell's town government and school districts received $2.84 billion in formula aid and $45.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.84B	$45.5M	$6.8M
$24,024 per resident (12th of 351) · gross	$384 per resident (176th of 351)	$57.65 per resident (63rd of 351)

Competitive grants to Lowell were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $128 million, are not shown.

EARMARKS

Lowell received $8.3 million in local earmarks naming the town, $7.9 million placed in the town and $8.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$8.3M	$7.9M	$8.9M	Not a member
$69.74 per resident (86th of 351)	$66.99 per resident (120th of 351)	$75.02 per resident (111th of 351)	35 municipalities had none

Placed in the town: 78 clauses in ten of ten budgets; the most recent in FY2026. $7.7 million came in clauses that name Lowell; the other $250,000 went to organizations based in Lowell, some of which serve a wider area.

Names the town includes $575,000 in clauses that name Lowell but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $950,000 in six clauses for state facilities located in Lowell (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$1M	"Greater Lowell technical high school for upgrading all athletic facilities in compliance with the Americans with Disabilities Act"	Enacted names the town
FY2025	$275,000	"Greater Lowell Community Foundation, Inc. in the city of Lowell for community programs"	Enacted names the town
FY2020	$250,000	"a new veterans park in Lowell"	Enacted names the town
FY2019	$250,000	"playground and park projects in Lowell"	Enacted names the town
FY2019	$250,000	"a new veterans park in Lowell"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lowell received 82% of its proportional share of competitive grant awards.

Local road miles **188.4** 21st of 351 · 1.6 per 1,000 residents (340th of 351)	Town-owned bridges, replacement cost **$270M** scored exposure $89.4M · four in poor condition	Road-stream crossings **128** 65th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **13.6 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **118,733** residents plus seasonal	Core infrastructure index **0.63** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **343 acres** 3.9% of land area · FY2026	State-owned land PILOT, FY2026 **$408,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,190** statewide $117 · FY2026	New growth per resident **$9,183** FY2017–2025 · 329th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 54.6% of Lowell's general-fund spending in FY2025, down from 55.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **55.3%** $157M of $284M · median town 14.1%	FY2016 **52.4%** $169M of $323M · median town 12.2%	FY2025 **54.6%** $288M of $527M · median town 11.5%	Net of state charges, FY2025 **45.1%** FY2010: 47.0% · median town 10.0%

Lowell's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $31.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lowell's state aid kept pace with both price measures: FY2025 aid was 17.9% above its FY2006 aid grown by Boston-area consumer prices and 4.8% above grown by the government price index.

Gross state aid went from $157 million in FY2006 to $288 million in FY2025, +82.9% in dollars. Flag: in FY2010, $12.2 million of Lowell's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.0%** $36.7M to $48.8M · all towns +54.0%	All fixed costs, FY2016–25 **+52.8%** $46.5M to $71.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lowell's health insurance would have been $45.8 million in FY2025; it was $48.8 million, $2.99 million above the path. Its fixed costs would have been $58.1 million in FY2025; it was $71.1 million, $13 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lowell came to $7.9 million, 64.8% of the $12.1 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$7.9M	64.8%	28.2%
Placed in the town	$7.4M	61.1%	42.3%
Everything placed	$8.4M	68.9%	45.2%

SCHOOLS

Lowell's required school contribution is 2.3% of median household income, 279th highest of 351.

Chapter 70 aid, FY2026 **$293M** to the town's district	Required local contribution **$77.2M** FY2026
Share of household income **2.3%** 279th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Lowell runs its own school district and also belongs to Greater Lowell; Lowell accounts for 72% of that district's foundation budget.

EXPECTED AND ACTUAL

Lowell received $66.5 million in earmarks placed in the town and competitive grants over ten years, 16% more than the $57.4 million its size, need and institutions predict.

PEERS

Lowell ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lowell this town	**70**	**$24,024**	**$384**	**$66.99**	**0.82**	**2.3%**
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Ludlow

Town · Hampden County · 20,904 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
7th Hampden · Aaron L. Saunders

STATE SENATE
Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS
Ludlow Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Ludlow scores 42 on the Fairness Index for all state aid and 57 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

198th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	37	49	38

Rank under other weightings: 165th to 230th.

Stable low: below 45 under every weighting

Ludlow received less than its share of state aid on all four measures; its blended score of 42 stays between 39 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

57 / 100

150th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	53	64	54

Rank under other weightings: 138th to 165th.

Weighting-dependent: the range crosses the 45–55 band

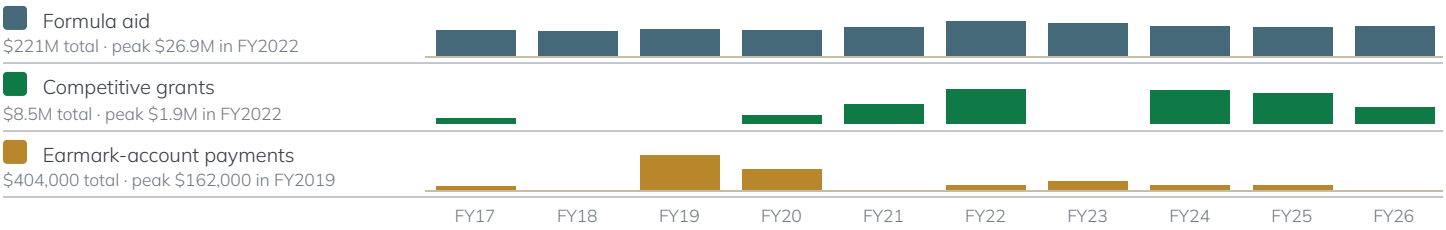
Ludlow received more than its share of discretionary money on all four measures; its blended score of 57 stays between 55 and 60 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ludlow's town government and school districts received $221 million in formula aid and $8.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$221M	**$8.5M**	**$404,000**
$10,596 per resident (163rd of 351) · gross	$407 per resident (165th of 351)	$19.31 per resident (207th of 351)

Competitive grants to Ludlow peaked in FY2022 at $1.9 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16 million, are not shown.

EARMARKS

Ludlow received $2.8 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.8M	**$2.8M**	**$2.8M**	**Not a member**
$132 per resident (23rd of 351)	$132 per resident (39th of 351)	$132 per resident (43rd of 351)	35 municipalities had none

Placed in the town: 23 clauses in nine of ten budgets; the most recent in FY2026. Every one names Ludlow directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$350,000	"the Westmass Area Development Corporation to offset and pay any and all costs incurred and related to, but not limited to, operational costs and…"	Enacted names the town
FY2025	$350,000	"the Westmass Area Development Corporation to offset and pay any and all costs incurred and related to, but not limited to, operational costs and…"	Enacted names the town
FY2024	$350,000	"offset and pay all costs incurred and related to, but not limited to, operational costs and expenses involved with the revitalization of the Ludlow…"	Enacted names the town
FY2023	$350,000	"the Westmass Area Development Corporation to offset and pay any and all costs incurred and related to, but not limited to, operational costs and…"	Enacted names the town
FY2022	$350,000	"the Westmass Area Development Corporation to offset and pay any and all costs incurred and related to, but not limited to, operational costs and…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ludlow received 1.85 times its proportional share of competitive grant awards.

Local road miles **124.0** 58th of 351 · 5.9 per 1,000 residents (193rd of 351)	Town-owned bridges, replacement cost **$18.2M** scored exposure $6.9M · one in poor condition	Road-stream crossings **177** 24th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **27.2 sq mi** 8% state-owned	Seasonal homes **1%** share of housing units	Peak service population **21,175** residents plus seasonal	Core infrastructure index **0.07** roads, culverts, dams, coast, flood, energy

Burden index 1.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,377 acres** 7.9% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$39.04** statewide $117 · FY2026	New growth per resident **$13,452** FY2017–2025 · 275th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.8% of Ludlow's general-fund spending in FY2025, down from 34.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **34.2%** $15M of $44M · median town 14.1%	FY2016 **29.0%** $17.3M of $59.5M · median town 12.2%	FY2025 **23.8%** $19.6M of $82.1M · median town 11.5%	Net of state charges, FY2025 **22.1%** FY2010: 34.1% · median town 10.0%

Ludlow's state aid did not keep pace with either price measure: FY2025 aid was 16.1% below its FY2006 aid grown by Boston-area consumer prices and 25.5% below grown by the government price index.

Gross state aid went from $15 million in FY2006 to $19.6 million in FY2025, +30.1% in dollars. Flag: in FY2010, $1.4 million of Ludlow's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+9.6%** $8.8M to $9.7M · all towns +54.0%	All fixed costs, FY2016–25 **+38.5%** $12M to $16.7M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ludlow's health insurance would have been $11 million in FY2025; it was $9.68 million, $1.35 million below the path. Its fixed costs would have been $15 million in FY2025; it was $16.7 million, $1.64 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ludlow came to $2.3 million, 2.7 times the $849,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.3M	2.7 times	28.2%
Placed in the town	$2.3M	2.7 times	42.3%
Everything placed	$2.3M	2.7 times	45.2%

SCHOOLS

Ludlow's required school contribution is 2.8% of median household income, 136th highest of 351.

Chapter 70 aid, FY2026 **$15M** to the town's district	Required local contribution **$20M** FY2026
Share of household income **2.8%** 136th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–1%** after inflation

Ludlow runs its own school district.

EXPECTED AND ACTUAL

Ludlow received $11.3 million in earmarks placed in the town and competitive grants over ten years, 47% more than the $7.7 million its size, need and institutions predict.

PEERS

Ludlow ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ludlow this town	**42**	**$10,596**	**$407**	**$132**	**1.85**	**2.8%**
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Lunenburg

Town · Worcester County · 11,902 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale
75% of residents
3rd Worcester · Michael P. Kushmerek
25% of residents
Lunenburg is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

Lunenburg Public Schools, the town's own district
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Lunenburg scores 40 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100
207th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	46	39	34

Rank under other weightings: 200th to 226th.

Stable low: below 45 under every weighting

Lunenburg received less than its share of state aid on all four measures; its blended score of 41 stays between 38 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100
287th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	28	28	19

Rank under other weightings: 281st to 298th.

Stable low: below 45 under every weighting

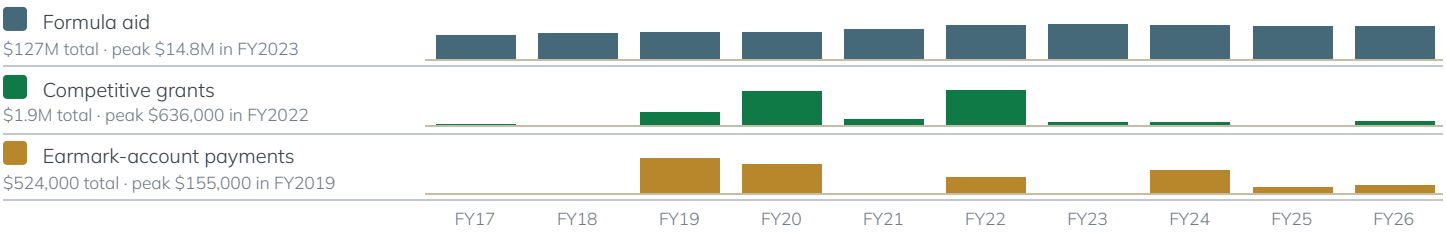
Lunenburg received less than its share of discretionary money on all four measures; its blended score of 25 stays between 24 and 27 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lunenburg's town government and school districts received $127 million in formula aid and $1.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$127M	**$1.9M**	**$524,000**
$10,667 per resident (157th of 351) · gross	$157 per resident (282nd of 351)	$44.04 per resident (93rd of 351)

Competitive grants to Lunenburg peaked in FY2022 at $636,000, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.6 million, are not shown.

EARMARKS

Lunenburg received $647,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$647,000	**$647,000**	**$647,000**	**Not a member**
$54.36 per resident (135th of 351)	$54.36 per resident (156th of 351)	$54.36 per resident (162nd of 351)	35 municipalities had none

Placed in the town: 12 clauses in seven of ten budgets; the most recent in FY2026. Every one names Lunenburg directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$165,000	"the purpose of the removal and replacement of fuel storage tanks in Lunenburg"	Enacted names the town
FY2023	$100,000	"the town of Lunenburg for improvements to the senior center in the town of Lunenburg"	Enacted names the town
FY2020	$100,000	"the Lunenburg Fire Department for the purposes of replacing the department's self-contained breathing apparatus"	Enacted names the town
FY2026	$40,000	"the town of Lunenburg for security system upgrades in the Lunenburg public schools"	Enacted names the town
FY2022	$40,000	"the town of Lunenburg for installation of light-emitting diode light fixtures at the Lunenburg Public Library"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lunenburg received 42% of its proportional share of competitive grant awards.

Local road miles **86.2** 132nd of 351 · 7.2 per 1,000 residents (151st of 351)	Town-owned bridges, replacement cost **$10M** scored exposure $3.2M · one in poor condition	Road-stream crossings **69** 200th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.4 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **11,902** residents plus seasonal	Core infrastructure index **0.59** roads, culverts, dams, coast, flood, energy

Burden index 0.42; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **129 acres** 0.8% of land area · FY2026	State-owned land PILOT, FY2026 **$49,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$376** statewide $117 · FY2026	New growth per resident **$19,157** FY2017–2025 · 199th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.0% of Lunenburg's general-fund spending in FY2025, up from 22.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **22.8%** $5.4M of $23.6M · median town 14.1%	FY2016 **23.9%** $8.1M of $33.7M · median town 12.2%	FY2025 **23.0%** $10.8M of $46.7M · median town 11.5%	Net of state charges, FY2025 **20.6%** FY2010: 21.9% · median town 10.0%

Lunenburg's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $848,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lunenburg's state aid kept pace with both price measures: FY2025 aid was 29.2% above its FY2006 aid grown by Boston-area consumer prices and 14.8% above grown by the government price index.

Gross state aid went from $5.4 million in FY2006 to $10.8 million in FY2025, +100.4% in dollars. Flag: in FY2010, $499,000 of Lunenburg's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+81.9%** $1.7M to $3M · all towns +54.0%	All fixed costs, FY2016–25 **+75.1%** $3.2M to $5.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lunenburg's health insurance would have been $2.09 million in FY2025; it was $3.04 million, $952,000 above the path. Its fixed costs would have been $3.94 million in FY2025; it was $5.52 million, $1.58 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lunenburg came to $577,000, 42.2% of the $1.37 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$577,000	42.2%	28.2%
Placed in the town	$577,000	42.2%	42.3%
Everything placed	$577,000	42.2%	45.2%

SCHOOLS

Lunenburg's required school contribution is 2.7% of median household income, 151st highest of 351.

Chapter 70 aid, FY2026 **$10.1M** to the town's district	Required local contribution **$14.6M** FY2026
Share of household income **2.7%** 151st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Lunenburg runs its own school district and also belongs to Montachusett; Lunenburg accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Lunenburg received $2.7 million in earmarks placed in the town and competitive grants over ten years, 51% of the $5.3 million its size, need and institutions predict.

PEERS

Lunenburg ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lunenburg this town	**40**	**$10,667**	**$157**	**$54.36**	**0.42**	**2.7%**
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Lynn

City · Essex County · 101,709 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Essex · Daniel Cahill 44% of residents
11th Essex · Sean Reid 42% of residents
8th Essex · Jennifer Balinsky Armini 8% of residents
9th Essex · Donald H. Wong 6% of residents

Lynn is split among four House districts. Shares are of 2020 residents.

STATE SENATE

Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS

Lynn Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Lynn scores 72 on the Fairness Index for all state aid and 46 for discretionary money. Fifty is a fair share.

ALL STATE AID

72 / 100

8th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	67	68	77

Rank under other weightings: 7th to 11th.

Stable high: above 55 under every weighting

Lynn received more than its share of state aid on all four measures; its blended score of 72 stays between 70 and 75 under every weighting tested.

DISCRETIONARY MONEY ONLY

46 / 100

198th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	36	54	48

Rank under other weightings: 186th to 220th.

Weighting-dependent: the range crosses the 45–55 band

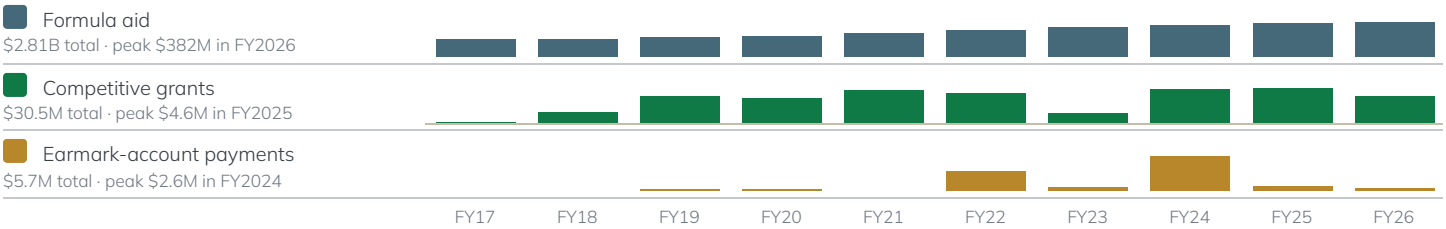
Lynn received less than its share of discretionary money on three of four measures; its blended score of 46 stays between 43 and 49 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lynn's town government and school districts received $2.81 billion in formula aid and $30.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.81B	**$30.5M**	**$5.7M**
$27,652 per resident (6th of 351) · gross	$300 per resident (209th of 351)	$56.37 per resident (65th of 351)

Competitive grants to Lynn were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $86.6 million, are not shown.

EARMARKS

Lynn received $9.6 million in local earmarks naming the town, $9.9 million placed in the town and $11.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$9.6M	**$9.9M**	**$11.8M**	**Not a member**
$94.57 per resident (58th of 351)	$97.57 per resident (74th of 351)	$116 per resident (56th of 351)	35 municipalities had none

Placed in the town: 122 clauses in ten of ten budgets; the most recent in FY2026. $7.8 million came in clauses that name Lynn; the other $2.2 million went to organizations based in Lynn, some of which serve a wider area.

Names the town includes $1.9 million in clauses that name Lynn but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $1.9 million in ten clauses for state facilities located in Lynn (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$300,000	"as a grant to the Lynn Housing Authority to provide housing stabilization services and information and referral services to households who face…"	Enacted names the town
FY2025	$300,000	"as grants to the Lynn Housing Authority to provide housing stabilization services and information and referral services to households who face…"	Enacted names the town
FY2024	$300,000	"equally as grants to Central Massachusetts Housing Alliance, Inc. and the Lynn housing authority to provide information and referral services…"	Enacted recipient based here
FY2024	$300,000	"equally as grants to Central Massachusetts Housing Alliance, Inc. and the Lynn housing authority for housing stabilization services for certain…"	Enacted recipient based here
FY2023	$300,000	"equally as grants to the Central Massachusetts Housing Alliance, Inc. and the Lynn housing authority to provide information and referral services…"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Lynn received 1.51 times its proportional share of competitive grant awards.

Local road miles **160.1** 29th of 351 · 1.6 per 1,000 residents (342nd of 351)	Town-owned bridges, replacement cost **$3.3M** scored exposure $1.3M · one in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **11** high or significant hazard
Land area **10.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **101,944** residents plus seasonal	Core infrastructure index **0.52** roads, culverts, dams, coast, flood, energy

Burden index 1.51; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$3,800** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$29,231** statewide $117 · FY2026	New growth per resident **$11,503** FY2017–2025 · 297th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 59.3% of Lynn's general-fund spending in FY2025, up from 59.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **59.1%** $137M of $231M · median town 14.1%	FY2016 **57.3%** $177M of $309M · median town 12.2%	FY2025 **59.3%** $323M of $544M · median town 11.5%	Net of state charges, FY2025 **51.6%** FY2010: 53.7% · median town 10.0%

Lynn's state aid kept pace with both price measures: FY2025 aid was 52.4% above its FY2006 aid grown by Boston-area consumer prices and 35.5% above grown by the government price index.

Gross state aid went from $137 million in FY2006 to $323 million in FY2025, +136.4% in dollars. Flag: in FY2010, $7.6 million of Lynn's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+62.5%** $50.8M to $82.6M · all towns +54.0%	All fixed costs, FY2016–25 **+56.6%** $82.6M to $129M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lynn's health insurance would have been $63.4 million in FY2025; it was $82.6 million, $19.1 million above the path. Its fixed costs would have been $103 million in FY2025; it was $129 million, $26.2 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lynn came to $8.5 million, 26.8% of the $31.8 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$8.5M	26.8%	28.2%
Placed in the town	$8.8M	27.7%	42.3%
Everything placed	$10.5M	33.2%	45.2%

SCHOOLS

Lynn's required school contribution is 2.5% of median household income, 238th highest of 351.

Chapter 70 aid, FY2026 **$317M** to the town's district	Required local contribution **$67.5M** FY2026
Share of household income **2.5%** 238th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Lynn runs its own school district.

EXPECTED AND ACTUAL

Lynn received $47.2 million in earmarks placed in the town and competitive grants over ten years, 92% of the $51.2 million its size, need and institutions predict.

PEERS

Lynn ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lynn this town	**72**	**$27,652**	**$300**	**$97.57**	**1.51**	**2.5%**
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Lynnfield

Town · Essex County · 13,064 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
20th Middlesex · Bradley H. Jones, Jr.

STATE SENATE
Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS
Lynnfield Public Schools, the town's own district
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Manchester-by-the-Sea, Marblehead and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Lynnfield scores 30 on the Fairness Index for all state aid and 36 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

307th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	44	22	24

Rank under other weightings: 288th to 331st.

Stable low: below 45 under every weighting

Lynnfield received less than its share of state aid on all four measures; its blended score of 30 stays between 26 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

36 / 100

242nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	48	34	28

Rank under other weightings: 231st to 254th.

Stable low: below 45 under every weighting

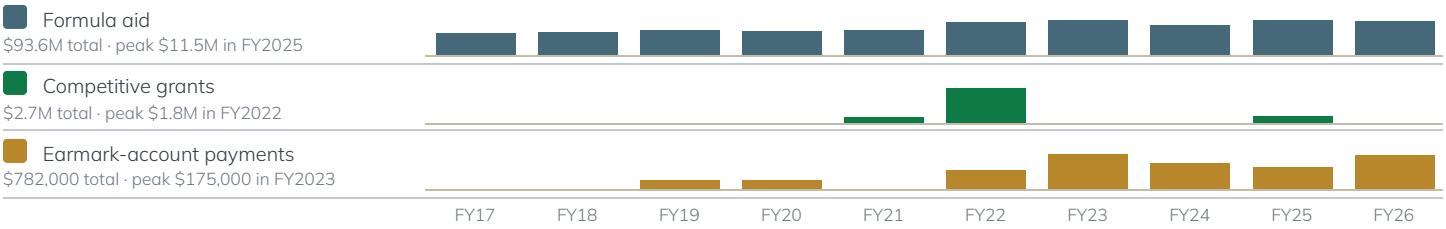
Lynnfield received less than its share of discretionary money on all four measures; its blended score of 36 stays between 32 and 39 under every weighting tested.

STATE MONEY, FY2017–FY2026

Lynnfield's town government and school districts received $93.6 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$93.6M	$2.7M	$782,000
$7,167 per resident (284th of 351) · gross	$206 per resident (247th of 351)	$59.88 per resident (56th of 351)

Competitive grants to Lynnfield peaked in FY2022 at $1.8 million, 67% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.1 million, are not shown.

EARMARKS

Lynnfield received $814,000 in local earmarks naming the town, $1.9 million placed in the town and $1.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$814,000	$1.9M	$1.9M	Not a member
$62.32 per resident (110th of 351)	$147 per resident (31st of 351)	$147 per resident (37th of 351)	35 municipalities had none

Placed in the town: 24 clauses in eight of ten budgets; the most recent in FY2026. $814,000 came in clauses that name Lynnfield; the other $1.1 million went to organizations based in Lynnfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$350,000	"the NAN Project to provide mental health awareness and suicide prevention programming in schools and communities"	Enacted recipient based here
FY2026	$250,000	"The Nan Project to increase mental health awareness and suicide prevention"	Enacted recipient based here
FY2025	$250,000	"The NAN Project to increase mental health awareness and suicide prevention"	Enacted recipient based here
FY2024	$200,000	"The NAN Project to increase mental health awareness and suicide prevention"	Enacted recipient based here
FY2026	$75,000	"converting the Lynnfield middle school fitness room in the town of Lynnfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Lynnfield received 81% of its proportional share of competitive grant awards.

Local road miles **68.8** 194th of 351 · 5.3 per 1,000 residents (219th of 351)	Town-owned bridges, replacement cost **$425,000** scored exposure $122,000 · none in poor condition	Road-stream crossings **47** 275th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **9.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **13,064** residents plus seasonal	Core infrastructure index **2.18** roads, culverts, dams, coast, flood, energy

Burden index 0.81; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **324 acres** 5.1% of land area · FY2026	State-owned land PILOT, FY2026 **$75,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$231** statewide $117 · FY2026	New growth per resident **$21,826** FY2017–2025 · 162nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.6% of Lynnfield's general-fund spending in FY2025, up from 9.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.8%** $3.3M of $33.5M · median town 14.1%	FY2016 **10.5%** $5.2M of $49.5M · median town 12.2%	FY2025 **10.6%** $7.7M of $72.8M · median town 11.5%	Net of state charges, FY2025 **9.7%** FY2010: 11.8% · median town 10.0%

Lynnfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $145,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Lynnfield's state aid kept pace with both price measures: FY2025 aid was 51.9% above its FY2006 aid grown by Boston-area consumer prices and 35.0% above grown by the government price index.

Gross state aid went from $3.3 million in FY2006 to $7.7 million in FY2025, +135.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+61.4%** $4.9M to $7.9M · all towns +54.0%	All fixed costs, FY2016–25 **+62.6%** $7.5M to $12.1M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Lynnfield's health insurance would have been $6.11 million in FY2025; it was $7.89 million, $1.78 million above the path. Its fixed costs would have been $9.31 million in FY2025; it was $12.1 million, $2.81 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Lynnfield came to $636,000, 21.2% of the $3.00 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$636,000	21.2%	28.2%
Placed in the town	$1.5M	49.5%	42.3%
Everything placed	$1.5M	49.5%	45.2%

SCHOOLS

Lynnfield's required school contribution is 3.0% of median household income, 74th highest of 351.

Chapter 70 aid, FY2026 **$6.7M** to the town's district	Required local contribution **$23.8M** FY2026
Share of household income **3.0%** 74th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Lynnfield runs its own school district and also belongs to Essex North Shore; Lynnfield accounts for 2% of that district's foundation budget.

EXPECTED AND ACTUAL

Lynnfield received $4.6 million in earmarks placed in the town and competitive grants over ten years, 16% more than the $4 million its size, need and institutions predict.

PEERS

Lynnfield ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Lynnfield this town	**30**	**$7,167**	**$206**	**$147**	**0.81**	**3.0%**
Ipswich peer	28	$6,449	$237	$49.75	0.55	2.3%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Malden

City · Middlesex County · 65,906 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

33rd Middlesex · Steven Ultrino 69% of residents
35th Middlesex · Paul J. Donato 25% of residents
32nd Middlesex · Kate Lipper-Garabedian 6% of residents

Malden is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Fifth Middlesex · Jason M. Lewis

SCHOOL DISTRICTS

Malden Public Schools, the city's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Melrose, North Reading, Reading, Revere, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Malden scores 51 on the Fairness Index for all state aid and 33 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

112th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	44	57	54

Rank under other weightings: 87th to 144th.

Near fair: between 45 and 55 under every weighting

Malden received more than its share of state aid on three of four measures; its blended score of 51 stays between 49 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

33 / 100

258th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	25	42	33

Rank under other weightings: 240th to 276th.

Stable low: below 45 under every weighting

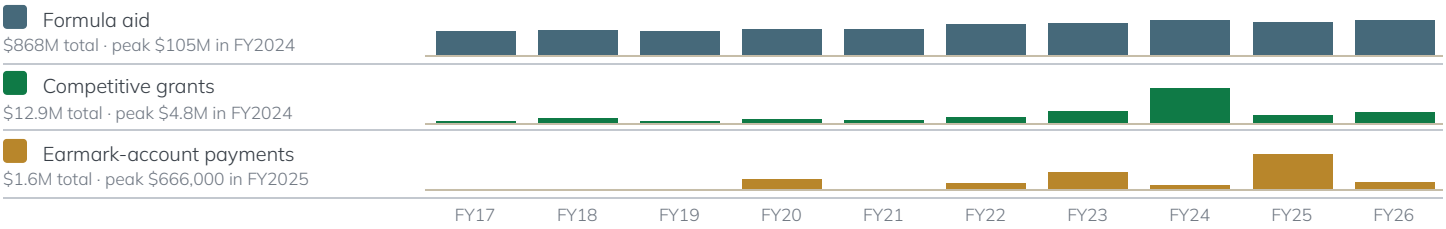
Malden received less than its share of discretionary money on all four measures; its blended score of 33 stays between 30 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Malden's town government and school districts received $868 million in formula aid and $12.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$868M	$12.9M	$1.6M
$13,164 per resident (109th of 351) · gross	$195 per resident (255th of 351)	$23.53 per resident (182nd of 351)

Competitive grants to Malden peaked in FY2024 at $4.8 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $59.9 million, are not shown.

EARMARKS

Malden received $3.6 million in local earmarks naming the town, $3.9 million placed in the town and $3.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.6M	$3.9M	$3.9M	Not a member
$54.61 per resident (133rd of 351)	$58.55 per resident (143rd of 351)	$58.55 per resident (151st of 351)	35 municipalities had none

Placed in the town: 56 clauses in ten of ten budgets; the most recent in FY2026. $3.6 million came in clauses that name Malden; the other $260,000 went to organizations based in Malden, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$250,000	"the city of Malden for improvements to parks and playgrounds to expand access to open spaces during the COVID-19 pandemic including, but not limited..."	Enacted names the town
FY2026	$100,000	"capital improvements to Linden park in the city of Malden, including, but not limited to, design, engineering and construction"	Enacted names the town
FY2026	$100,000	"Housing Families, Inc. in the city of Malden for technological infrastructure improvements to support community based health services"	Enacted names the town
FY2025	$100,000	"Malden for flood mitigation including, but not limited to, the cleaning and maintenance of the Town Line brook and Linden brook culverts"	Enacted names the town
FY2025	$100,000	"Housing Families homeless children program in Malden"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Malden received 1.64 times its proportional share of competitive grant awards.

Local road miles **94.5** 109th of 351 · 1.4 per 1,000 residents (344th of 351)	Town-owned bridges, replacement cost **$24.8M** scored exposure $7.2M · none in poor condition	Road-stream crossings **6** 342nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **5.0 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **66,128** residents plus seasonal	Core infrastructure index **3.27** roads, culverts, dams, coast, flood, energy

Burden index 1.64; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$12,457** FY2017–2025 · 286th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 36.7% of Malden's general-fund spending in FY2025, down from 43.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **43.4%** $55.9M of $129M · median town 14.1%	FY2016 **41.6%** $68.1M of $164M · median town 12.2%	FY2025 **36.7%** $81.6M of $222M · median town 11.5%	Net of state charges, FY2025 **29.4%** FY2010: 34.9% · median town 10.0%

Malden's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Malden's state aid did not keep pace with either price measure: FY2025 aid was 5.9% below its FY2006 aid grown by Boston-area consumer prices and 16.4% below grown by the government price index.

Gross state aid went from $55.9 million in FY2006 to $81.6 million in FY2025, +45.9% in dollars. Flag: in FY2010, $6.8 million of Malden's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.6%** $25.8M to $36.2M · all towns +54.0%	All fixed costs, FY2016–25 **+58.0%** $29.3M to $46.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Malden's health insurance would have been $32.2 million in FY2025; it was $36.2 million, $4.04 million above the path. Its fixed costs would have been $36.6 million in FY2025; it was $46.3 million, $9.71 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Malden came to $3.1 million, 29.9% of the $10.4 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.1M	29.9%	28.2%
Placed in the town	$3.4M	32.3%	42.3%
Everything placed	$3.4M	32.3%	45.2%

SCHOOLS

Malden's required school contribution is 2.4% of median household income, 260th highest of 351.

Chapter 70 aid, FY2026 **$72.4M** to the town's district	Required local contribution **$62.9M** FY2026
Share of household income **2.4%** 260th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Malden runs its own school district and also belongs to Northeast Metropolitan; Malden accounts for 14% of that district's foundation budget.

EXPECTED AND ACTUAL

Malden received $19.9 million in earmarks placed in the town and competitive grants over ten years, 77% of the $25.9 million its size, need and institutions predict.

PEERS

Malden ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Malden this town	**51**	**$13,164**	**$195**	**$58.55**	**1.64**	**2.4%**
Haverhill peer	58	$16,056	$523	$98.18	2.11	2.7%
Revere peer	64	$19,109	$328	$31.01	2.70	2.8%
Marlborough peer	53	$13,835	$804	$65.97	1.57	3.4%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Framingham best in class of 30	54	$14,513	$248	$157	0.72	3.1%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Manchester-by-the-Sea

Town · Essex County · 5,403 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Essex · Andrew Tarr and Ann-Margaret Ferrante (until November 2025)

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Manchester Essex Regional School District, shared with Essex
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Marblehead and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Manchester-by-the-Sea scores 34 on the Fairness Index for all state aid and 72 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

275th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	56	30	20

Rank under other weightings: 238th to 308th.

Stable low: below 45 under every weighting

Manchester-by-the-Sea received less than its share of state aid on three of four measures; its blended score of 34 stays between 28 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

72 / 100

100th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	88	70	60

Rank under other weightings: 84th to 114th.

Stable high: above 55 under every weighting

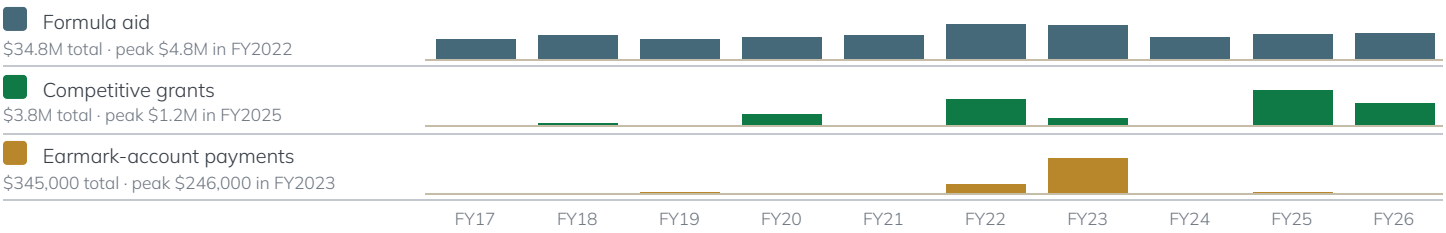
Manchester-by-the-Sea received more than its share of discretionary money on all four measures; its blended score of 72 stays between 68 and 77 under every weighting tested.

STATE MONEY, FY2017–FY2026

Manchester-by-the-Sea's town government and school districts received $34.8 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$34.8M	$3.8M	$345,000
$6,434 per resident (322nd of 351) · gross	$696 per resident (113th of 351)	$63.90 per resident (46th of 351)

Competitive grants to Manchester-by-the-Sea peaked in FY2025 at $1.2 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

Manchester-by-the-Sea received $324,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$324,000	$324,000	$324,000	Not a member
$60.01 per resident (116th of 351)	$60.01 per resident (139th of 351)	$60.01 per resident (145th of 351)	35 municipalities had none

Placed in the town: 16 clauses in seven of ten budgets; the most recent in FY2026. Every one names Manchester-by-the-Sea directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the town of Manchester-by-the-Sea for the planning and design of a senior and general municipal use center, or both"	Enacted names the town
FY2017	$50,000	"emergency repairs and design and engineering plans for the restoration of Morse Pier in the town of Manchester-By-the-Sea"	Enacted names the town
FY2025	$30,000	"Cape Ann's Energy Future comprehensive review in the town of Manchester-by-the-Sea"	Enacted names the town
FY2024	$30,000	"the town of Manchester-by-the-Sea for wastewater treatment plant floodproofing efforts"	Enacted names the town
FY2023	$25,000	"the replacement of the turf field at Manchester-Essex Regional high school in the town of Manchester"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Manchester-by-the-Sea received 2.44 times its proportional share of competitive grant awards.

Local road miles **24.3** 331st of 351 · 4.5 per 1,000 residents (260th of 351)	Town-owned bridges, replacement cost **$1.8M** scored exposure $1.2M · one in poor condition	Road-stream crossings **75** 180th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **9.2 sq mi** 0% state-owned	Seasonal homes **3%** share of housing units	Peak service population **5,578** residents plus seasonal	Core infrastructure index **1.04** roads, culverts, dams, coast, flood, energy

Burden index 2.44; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$36,828** FY2017–2025 · 74th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 0.8% of Manchester-by-the-Sea's general-fund spending in FY2025, down from 1.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **1.7%** $296,000 of $17.3M · median town 14.1%	FY2016 **0.8%** $220,000 of $26.4M · median town 12.2%	FY2025 **0.8%** $309,000 of $37.6M · median town 11.5%	Net of state charges, FY2025 **0.3%** FY2010: 0.3% · median town 10.0%

Manchester-by-the-Sea's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Manchester-by-the-Sea's state aid did not keep pace with either price measure: FY2025 aid was 32.7% below its FY2006 aid grown by Boston-area consumer prices and 40.1% below grown by the government price index.

Gross state aid went from $296,000 in FY2006 to $309,000 in FY2025, +4.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+1.1%** $1.4M to $1.4M · all towns +54.0%	All fixed costs, FY2016–25 **+36.5%** $2.6M to $3.6M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Manchester-by-the-Sea's health insurance would have been $1.78 million in FY2025; it was $1.44 million, $339,000 below the path. Its fixed costs would have been $3.29 million in FY2025; it was $3.60 million, $306,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Manchester-by-the-Sea came to $312,000, 20.3 times the $15,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$312,000	20.3 times	28.2%
Placed in the town	$312,000	20.3 times	42.3%
Everything placed	$312,000	20.3 times	45.2%

SCHOOLS

Manchester-by-the-Sea's required school contribution is 1.6% of median household income, 330th highest of 351.

Chapter 70 aid, FY2026 **$2.1M** attributed to the town	Required local contribution **$7.3M** FY2026
Share of household income **1.6%** 330th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Manchester-by-the-Sea has no school district of its own. Its pupils attend Manchester Essex and Essex North Shore; Manchester-by-the-Sea accounts for 58% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Manchester-by-the-Sea received $6.3 million in earmarks placed in the town and competitive grants over ten years, 3.7 times the $1.7 million its size, need and institutions predict.

PEERS

Manchester-by-the-Sea ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Manchester-by-the-Sea this town	**34**	**$6,434**	**$696**	**$60.01**	**2.44**	**1.6%**
Dover peer	37	$8,305	$138	$99.67	1.08	2.4%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
West Tisbury peer	52	$11,333	$312	$14.61	0.59	2.5%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Chilmark lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Mansfield

Town · Bristol County · 23,931 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Bristol · Michael S. Chaisson 51% of residents
14th Bristol · Adam J. Scanlon 32% of residents
8th Norfolk · Edward R. Philips 17% of residents

Mansfield is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Mansfield Public Schools, the town's own district
Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Foxborough, Norton, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Mansfield scores 46 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

153rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	54	42	43

Rank under other weightings: 145th to 164th.

Weighting-dependent: the range crosses the 45–55 band

Mansfield received less than its share of state aid on three of four measures; its blended score of 46 stays between 44 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

297th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	29	23	21

Rank under other weightings: 292nd to 300th.

Stable low: below 45 under every weighting

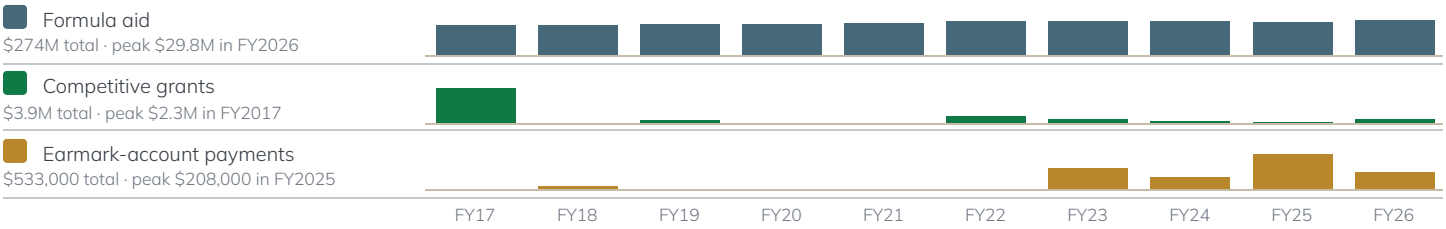
Mansfield received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

Mansfield's town government and school districts received $274 million in formula aid and $3.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$274M	**$3.9M**	**$533,000**
$11,457 per resident (138th of 351) · gross	$163 per resident (272nd of 351)	$22.28 per resident (189th of 351)

Competitive grants to Mansfield peaked in FY2017 at $2.3 million, 58% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20.3 million, are not shown.

EARMARKS

Mansfield received $727,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$727,000	**$727,000**	**$727,000**	**Not a member**
$30.37 per resident (229th of 351)	$30.37 per resident (240th of 351)	$30.37 per resident (240th of 351)	35 municipalities had none

Placed in the town: 22 clauses in ten of ten budgets; the most recent in FY2026. Every one names Mansfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$75,000	"improvements to the Massachusetts Music & Arts Society in Mansfield"	Enacted names the town
FY2026	$50,000	"the Mass Arts Center in the town of Mansfield to support its performing arts programming"	Enacted names the town
FY2026	$50,000	"the town of Mansfield for planning and implementation of Mansfield's 250th anniversary celebration"	Enacted names the town
FY2025	$50,000	"a downtown beautification project in the town of Mansfield"	Enacted names the town
FY2024	$50,000	"a downtown beautification project in the town of Mansfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Mansfield received 28% of its proportional share of competitive grant awards.

Local road miles **114.8** 67th of 351 · 4.8 per 1,000 residents (243rd of 351)	Town-owned bridges, replacement cost **$20.7M** scored exposure $6.6M · three in poor condition	Road-stream crossings **170** 28th of 351 · culverts and small crossings	Town-owned hazard dams **7** high or significant hazard
Land area **20.1 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **24,101** residents plus seasonal	Core infrastructure index **0.39** roads, culverts, dams, coast, flood, energy

Burden index 0.28; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$20,116** FY2017–2025 · 179th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 19.8% of Mansfield's general-fund spending in FY2025, down from 20.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.1%** $16.3M of $81.5M · median town 14.1%	FY2016 **26.9%** $22.5M of $84M · median town 12.2%	FY2025 **19.8%** $23.1M of $116M · median town 11.5%	Net of state charges, FY2025 **18.1%** FY2010: 26.9% · median town 10.0%

Mansfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $505,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Mansfield's state aid did not keep pace with either price measure: FY2025 aid was 9.0% below its FY2006 aid grown by Boston-area consumer prices and 19.2% below grown by the government price index.

Gross state aid went from $16.3 million in FY2006 to $23.1 million in FY2025, +41.1% in dollars. Flag: in FY2010, $2.3 million of Mansfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+55.7%** $8.5M to $13.2M · all towns +54.0%	All fixed costs, FY2016–25 **+55.3%** $14.1M to $21.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Mansfield's health insurance would have been $10.6 million in FY2025; it was $13.2 million, $2.61 million above the path. Its fixed costs would have been $17.6 million in FY2025; it was $21.9 million, $4.28 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2025 (+41%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Mansfield came to $559,000, 11.9% of the $4.71 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$559,000	11.9%	28.2%
Placed in the town	$559,000	11.9%	42.3%
Everything placed	$559,000	11.9%	45.2%

SCHOOLS

Mansfield's required school contribution is 3.4% of median household income, 24th highest of 351.

Chapter 70 aid, FY2026 **$20.7M** to the town's district	Required local contribution **$38.5M** FY2026
Share of household income **3.4%** 24th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Mansfield runs its own school district and also belongs to Southeastern and Bristol County; Mansfield accounts for 5% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Mansfield received $4.7 million in earmarks placed in the town and competitive grants over ten years, 53% of the $8.9 million its size, need and institutions predict.

PEERS

Mansfield ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Mansfield this town	**46**	**$11,457**	**$163**	**$30.37**	**0.28**	**3.4%**
Franklin peer	49	$12,355	$201	$73.18	0.69	3.1%
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Uxbridge peer · lowest in class of 30	48	$11,199	$436	$15.55	1.22	2.8%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Marblehead

Town · Essex County · 20,413 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Essex · Jennifer Balinsky Armini

STATE SENATE

Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS

Marblehead Public Schools, the town's own district

Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Marblehead scores 29 on the Fairness Index for all state aid and 31 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

317th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	41	25	26

Rank under other weightings: 300th to 334th.

Stable low: below 45 under every weighting

Marblehead received less than its share of state aid on all four measures; its blended score of 29 stays between 26 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

31 / 100

264th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	42	32	27

Rank under other weightings: 250th to 268th.

Stable low: below 45 under every weighting

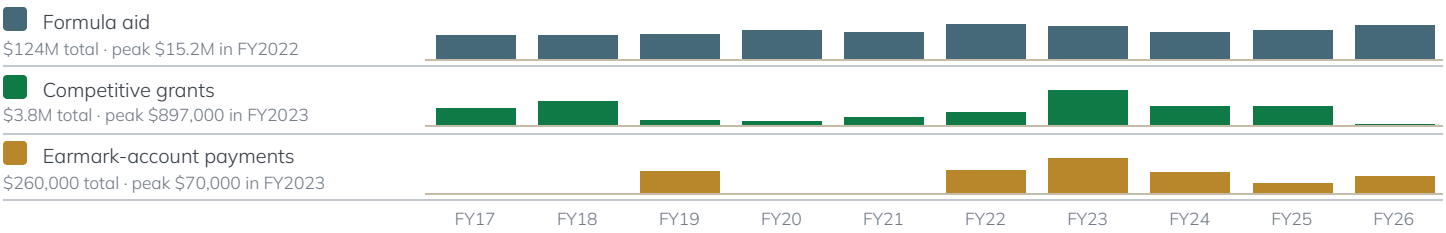
Marblehead received less than its share of discretionary money on all four measures; its blended score of 31 stays between 28 and 35 under every weighting tested.

STATE MONEY, FY2017–FY2026

Marblehead's town government and school districts received $124 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$124M	**$3.8M**	**$260,000**
$6,094 per resident (332nd of 351) · gross	$187 per resident (260th of 351)	$12.73 per resident (241st of 351)

Competitive grants to Marblehead peaked in FY2023 at $897,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.3 million, are not shown.

EARMARKS

Marblehead received $442,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$442,000	**$442,000**	**$442,000**	**Not a member**
$21.64 per resident (263rd of 351)	$21.64 per resident (273rd of 351)	$21.64 per resident (273rd of 351)	35 municipalities had none

Placed in the town: 12 clauses in six of ten budgets; the most recent in FY2026. Every one names Marblehead directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$100,000	"renovations needed for the Marblehead Council on Aging's kitchen in the town of Marblehead"	Enacted names the town
FY2026	$50,000	"the town of Marblehead for repairs to the irrigation system and deteriorating structures at Marblehead cemeteries"	Enacted names the town
FY2022	$50,000	"the town of Marblehead for facility updates and improvements"	Enacted names the town
FY2022	$50,000	"renovations needed for the public restrooms and property surrounding the restrooms at the State street landing in the town of Marblehead"	Enacted names the town
FY2019	$45,000	"maintenance and repair of Goldthwait marsh in the town of Marblehead"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Marblehead received 50% of its proportional share of competitive grant awards.

Local road miles **69.0** 192nd of 351 · 3.4 per 1,000 residents (305th of 351)	Town-owned bridges, replacement cost **$2.3M** scored exposure $2.5M · one in poor condition	Road-stream crossings **20** 327th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.4 sq mi** 0% state-owned	Seasonal homes **4%** share of housing units	Peak service population **21,408** residents plus seasonal	Core infrastructure index **0.94** roads, culverts, dams, coast, flood, energy

Burden index 0.50; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$15,867** FY2017–2025 · 241st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.4% of Marblehead's general-fund spending in FY2025, down from 9.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.5%** $6.1M of $63.9M · median town 14.1%	FY2016 **9.5%** $6.9M of $72.8M · median town 12.2%	FY2025 **8.4%** $8.8M of $105M · median town 11.5%	Net of state charges, FY2025 **6.0%** FY2010: 7.5% · median town 10.0%

Marblehead's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $88,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Marblehead's state aid did not keep pace with either price measure: FY2025 aid was 6.0% below its FY2006 aid grown by Boston-area consumer prices and 16.4% below grown by the government price index.

Gross state aid went from $6.1 million in FY2006 to $8.8 million in FY2025, +45.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.5%** $9.7M to $13M · all towns +54.0%	All fixed costs, FY2016–25 **+46.3%** $13.3M to $19.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Marblehead's health insurance would have been $12.2 million in FY2025; it was $13 million, $843,000 above the path. Its fixed costs would have been $16.6 million in FY2025; it was $19.5 million, $2.86 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Marblehead came to $348,000, 10.7% of the $3.27 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$348,000	10.7%	28.2%
Placed in the town	$348,000	10.7%	42.3%
Everything placed	$348,000	10.7%	45.2%

SCHOOLS

Marblehead's required school contribution is 1.9% of median household income, 320th highest of 351.

Chapter 70 aid, FY2026 **$7.1M** to the town's district	Required local contribution **$28.1M** FY2026
Share of household income **1.9%** 320th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

Marblehead runs its own school district and also belongs to Essex North Shore; Marblehead accounts for 2% of that district's foundation budget.

EXPECTED AND ACTUAL

Marblehead received $4.7 million in earmarks placed in the town and competitive grants over ten years, 72% of the $6.6 million its size, need and institutions predict.

PEERS

Marblehead ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Marblehead this town	**29**	**$6,094**	**$187**	**$21.64**	**0.50**	**1.9%**
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Marion

Town · Plymouth County · 5,310 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
10th Bristol · Mark D. Sylvia

STATE SENATE
Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS
Marion Public Schools, the town's own district
Old Rochester Regional School District, shared with Mattapoisett and Rochester
Upper Cape Cod Regional Vocational Technical School District, vocational, shared with Bourne, Falmouth, Sandwich and Wareham

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Marion scores 30 on the Fairness Index for all state aid and 63 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

303rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	36	27	29

Rank under other weightings: 292nd to 312th.

Stable low: below 45 under every weighting

Marion received less than its share of state aid on all four measures; its blended score of 30 stays between 29 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

63 / 100

131st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	73	47	66

Rank under other weightings: 122nd to 145th.

Stable high: above 55 under every weighting

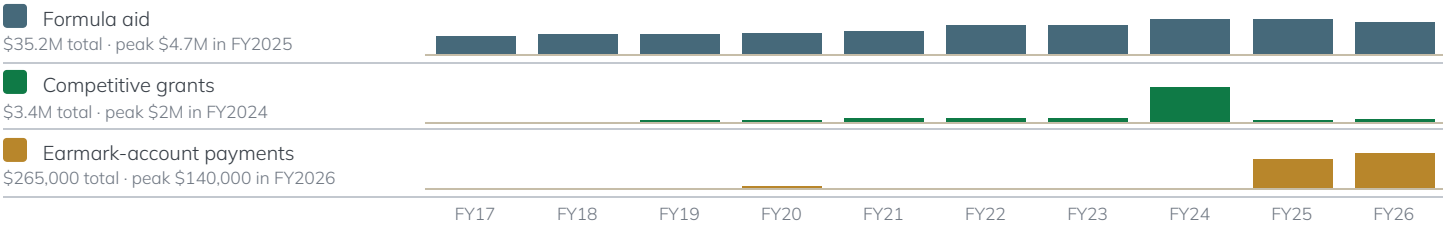
Marion received more than its share of discretionary money on three of four measures; its blended score of 63 stays between 59 and 67 under every weighting tested.

STATE MONEY, FY2017–FY2026

Marion's town government and school districts received $35.2 million in formula aid and $3.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$35.2M	**$3.4M**	**$265,000**
$6,631 per resident (310th of 351) · gross	$643 per resident (119th of 351)	$49.95 per resident (79th of 351)

Competitive grants to Marion peaked in FY2024 at $2 million, 57% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.6 million, are not shown.

EARMARKS

Marion received $65,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$65,000	**$65,000**	**$65,000**	**Not a member**
$12.24 per resident (293rd of 351)	$12.24 per resident (302nd of 351)	$12.24 per resident (303rd of 351)	35 municipalities had none

Placed in the town: four clauses in three of ten budgets; the most recent in FY2023. Every one names Marion directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$25,000	"the renovation of and utility tie-ins at the council on aging Cushing Community Center in the town of Marion"	Enacted names the town
FY2023	$20,000	"enhance services at the Marion council on aging"	Enacted names the town
FY2020	$10,000	"enhance services at the Marion council on aging"	Enacted names the town
FY2019	$10,000	"enhance services at the Marion Council on Aging"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Marion received 43% of its proportional share of competitive grant awards.

Local road miles **28.7** 325th of 351 · 5.4 per 1,000 residents (215th of 351)	Town-owned bridges, replacement cost **$1.1M** scored exposure $604,000 · none in poor condition	Road-stream crossings **47** 275th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.1 sq mi** 6% state-owned	Seasonal homes **11%** share of housing units	Peak service population **5,977** residents plus seasonal	Core infrastructure index **0.49** roads, culverts, dams, coast, flood, energy

Burden index 0.43; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **490 acres** 5.4% of land area · FY2026	State-owned land PILOT, FY2026 **$41,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$83.82** statewide $117 · FY2026	New growth per resident **$30,867** FY2017–2025 · 101st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

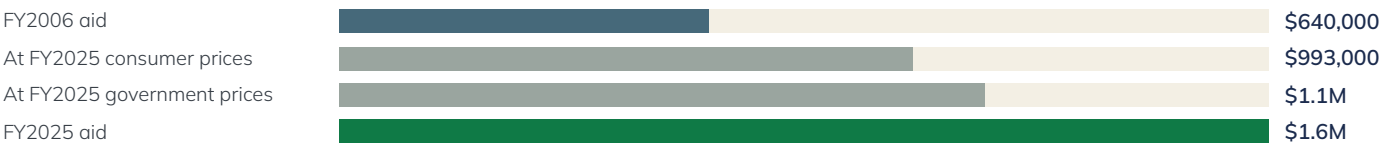
State aid covered 5.1% of Marion's general-fund spending in FY2025, up from 4.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.2%** $640,000 of $15.1M · median town 14.1%	FY2016 **4.8%** $955,000 of $19.9M · median town 12.2%	FY2025 **5.1%** $1.6M of $31.5M · median town 11.5%	Net of state charges, FY2025 **4.8%** FY2010: 3.9% · median town 10.0%

Marion's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Marion's state aid kept pace with both price measures: FY2025 aid was 62.1% above its FY2006 aid grown by Boston-area consumer prices and 44.0% above grown by the government price index.



Gross state aid went from $640,000 in FY2006 to $1.6 million in FY2025, +151.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+26.6%** $843,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+60.0%** $2.4M to $3.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Marion's health insurance would have been $1.05 million in FY2025; it was $1.07 million, $14,000 above the path. Its fixed costs would have been $2.98 million in FY2025; it was $3.82 million, $838,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (–37%) and FY2024 (+72%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Marion came to $65,000, 29.0% of the $224,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$65,000	29.0%	28.2%
Placed in the town	$65,000	29.0%	42.3%
Everything placed	$65,000	29.0%	45.2%

SCHOOLS

Marion's required school contribution is 2.7% of median household income, 152nd highest of 351.

Chapter 70 aid, FY2026 **$2.5M** to the town's district	Required local contribution **$8.2M** FY2026
Share of household income **2.7%** 152nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+48%** after inflation

Marion runs its own district for some grades and belongs to Old Rochester and Upper Cape Cod for others; Marion accounts for 32% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Marion received $3.5 million in earmarks placed in the town and competitive grants over ten years, 76% of the $4.6 million its size, need and institutions predict.

PEERS

Marion ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Marion this town	**30**	**$6,631**	**$643**	**$12.24**	**0.43**	**2.7%**
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Essex peer · best in class of 30	32	$7,261	$477	$208	0.75	2.6%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Hinsdale lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Marlborough

City · Middlesex County · 41,647 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Middlesex · Danielle W. Gregoire
87% of residents

13th Middlesex · Carmine Lawrence Gentile
13% of residents

Marlborough is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Marlborough Public Schools, the city's own district

Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Hudson, Maynard, Northborough, Southborough and Westborough

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Marlborough scores 53 on the Fairness Index for all state aid and 74 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

100th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	49	51	57

Rank under other weightings: 89th to 119th.

Near fair: between 45 and 55 under every weighting

Marlborough received more than its share of state aid on three of four measures; its blended score of 53 stays between 51 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

74 / 100

91st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
75	71	72	78

Rank under other weightings: 88th to 98th.

Stable high: above 55 under every weighting

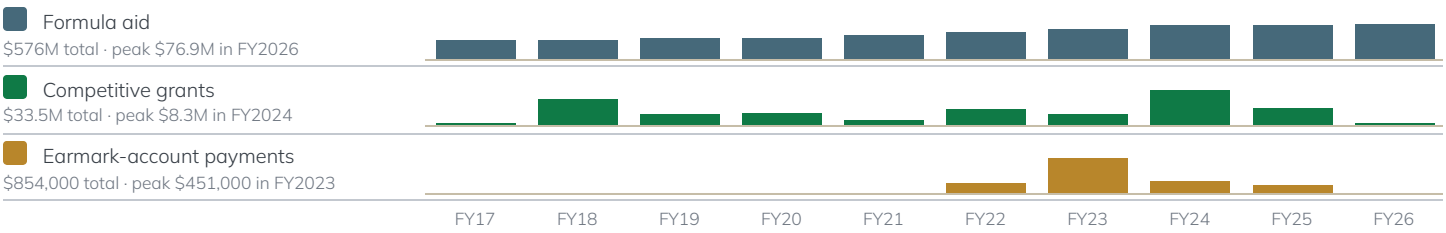
Marlborough received more than its share of discretionary money on all four measures; its blended score of 74 stays between 73 and 76 under every weighting tested.

STATE MONEY, FY2017–FY2026

Marlborough's town government and school districts received $576 million in formula aid and $33.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$576M	**$33.5M**	**$854,000**
$13,835 per resident (98th of 351) · gross	$804 per resident (93rd of 351)	$20.51 per resident (200th of 351)

Competitive grants to Marlborough peaked in FY2024 at $8.3 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $55.7 million, are not shown.

EARMARKS

Marlborough received $2.5 million in local earmarks naming the town, $2.7 million placed in the town and $2.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.5M	**$2.7M**	**$2.7M**	**Not a member**
$61.17 per resident (115th of 351)	$65.97 per resident (125th of 351)	$65.97 per resident (131st of 351)	35 municipalities had none

Placed in the town: 32 clauses in ten of ten budgets; the most recent in FY2026. $2.5 million came in clauses that name Marlborough; the other $200,000 went to organizations based in Marlborough, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$300,000	"the Marlborough Public Library Foundation, Inc. to purchase equipment including, but not limited to, furniture, bookshelves, computers, printers and…"	Enacted names the town
FY2024	$250,000	"the Marlborough police station for the reconstruction of curbing and resurfacing of the parking lot"	Enacted names the town
FY2025	$200,000	"the Marlborough economic development council's commuter shuttle service"	Enacted names the town
FY2024	$175,000	"the Marlborough fire department to replace CAD software and provide technology upgrades, computers, wiring, cable and television screens at all 3…"	Enacted names the town
FY2026	$100,000	"rehabilitation of the women veterans park in the city of Marlborough"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Marlborough received 1.57 times its proportional share of competitive grant awards.

Local road miles **138.4** 43rd of 351 · 3.3 per 1,000 residents (308th of 351)	Town-owned bridges, replacement cost **$11.6M** scored exposure $1.7M · none in poor condition	Road-stream crossings **128** 65th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **20.9 sq mi** 8% state-owned	Seasonal homes **1%** share of housing units	Peak service population **41,910** residents plus seasonal	Core infrastructure index **0.61** roads, culverts, dams, coast, flood, energy

Burden index 1.57; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **507 acres** 3.8% of land area · FY2026	State-owned land PILOT, FY2026 **$144,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$284** statewide $117 · FY2026	New growth per resident **$28,546** FY2017–2025 · 115th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

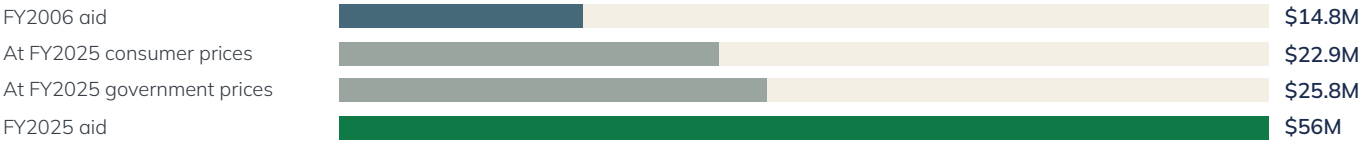
State aid covered 27.3% of Marlborough's general-fund spending in FY2025, up from 15.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.0%** $14.8M of $98.1M · median town 14.1%	FY2016 **21.9%** $29.5M of $135M · median town 12.2%	FY2025 **27.3%** $56M of $205M · median town 11.5%	Net of state charges, FY2025 **22.4%** FY2010: 14.4% · median town 10.0%

Marlborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $6.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Marlborough's state aid kept pace with both price measures: FY2025 aid was 144.7% above its FY2006 aid grown by Boston-area consumer prices and 117.5% above grown by the government price index.



Gross state aid went from $14.8 million in FY2006 to $56 million in FY2025, +279.6% in dollars. Flag: in FY2010, $1.6 million of Marlborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+71.4%** $19.5M to $33.5M · all towns +54.0%	All fixed costs, FY2016–25 **+61.9%** $29.3M to $47.5M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Marlborough's health insurance would have been $24.4 million in FY2025; it was $33.5 million, $9.10 million above the path. Its fixed costs would have been $36.6 million in FY2025; it was $47.5 million, $10.9 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Marlborough came to $2.4 million, 17.3% of the $14 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.4M	17.3%	28.2%
Placed in the town	$2.6M	18.8%	42.3%
Everything placed	$2.6M	18.8%	45.2%

SCHOOLS

Marlborough's required school contribution is 3.4% of median household income, 21st highest of 351.

Chapter 70 aid, FY2026 **$59.8M** to the town's district	Required local contribution **$52.5M** FY2026
Share of household income **3.4%** 21st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+49%** after inflation

Marlborough runs its own school district and also belongs to Assabet Valley; Marlborough accounts for 57% of that district's foundation budget.

EXPECTED AND ACTUAL

Marlborough received $38.8 million in earmarks placed in the town and competitive grants over ten years, 72% more than the $22.5 million its size, need and institutions predict.

PEERS

Marlborough ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Marlborough this town	**53**	**$13,835**	**$804**	**$65.97**	**1.57**	**3.4%**
Revere peer	64	$19,109	$328	$31.01	2.70	2.8%
Malden peer	51	$13,164	$195	$58.55	1.64	2.4%
Haverhill peer	58	$16,056	$523	$98.18	2.11	2.7%
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Framingham best in class of 30	54	$14,513	$248	$157	0.72	3.1%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Marshfield

Town · Plymouth County · 25,879 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Plymouth · Patrick Joseph Kearney
84% of residents
6th Plymouth · Kenneth P. Sweezey
16% of residents
Marshfield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS

Marshfield Public Schools, the town's own district
South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Hanson, Norwell, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Marshfield scores 38 on the Fairness Index for all state aid and 48 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100
238th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	44	35	35

Rank under other weightings: 227th to 247th.

Stable low: below 45 under every weighting

Marshfield received less than its share of state aid on all four measures; its blended score of 38 stays between 36 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

48 / 100
196th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	54	45	45

Rank under other weightings: 183rd to 199th.

Near fair: between 45 and 55 under every weighting

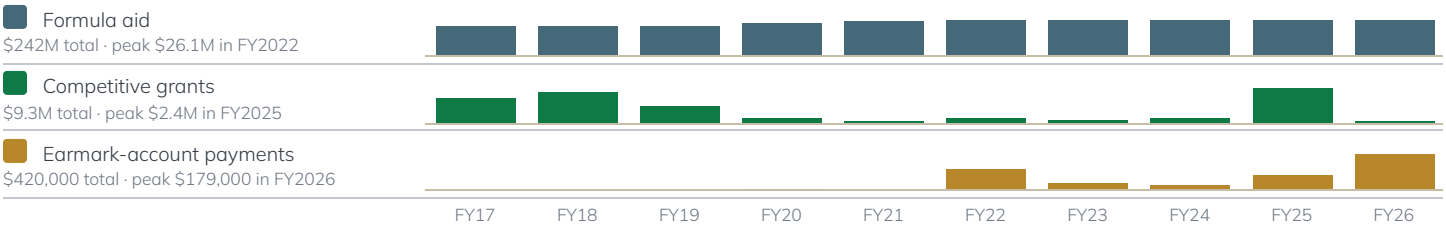
Marshfield received less than its share of discretionary money on three of four measures; its blended score of 48 stays between 46 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

Marshfield's town government and school districts received $242 million in formula aid and $9.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$242M	$9.3M	$420,000
$9,344 per resident (202nd of 351) · gross	$361 per resident (184th of 351)	$16.22 per resident (227th of 351)

Competitive grants to Marshfield peaked in FY2025 at $2.4 million, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20.2 million, are not shown.

EARMARKS

Marshfield received $1.2 million in local earmarks naming the town, $4.2 million placed in the town and $4.2 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$4.2M	$4.2M	Not a member
$46.58 per resident (157th of 351)	$162 per resident (16th of 351)	$162 per resident (25th of 351)	35 municipalities had none

Placed in the town: 35 clauses in ten of ten budgets; the most recent in FY2026. $1.2 million came in clauses that name Marshfield; the other $3 million went to organizations based in Marshfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$350,000	"the Talking Information Center, Incorporated to provide human voiced broadcasts of local news, articles and items of interest to visually-impaired…"	Enacted recipient based here
FY2025	$350,000	"the Talking Information Center, Incorporated to provide human voiced broadcasts of local news, articles and items of interest to visually-impaired…"	Enacted recipient based here
FY2024	$350,000	"the Talking Information Center, Incorporated to provide human voiced broadcasts of local news, articles and items of interest to visually-impaired…"	Enacted recipient based here
FY2023	$350,000	"the Talking Information Center, Incorporated to provide human voiced broadcasts of local news, articles and items of interest to visually-impaired…"	Enacted recipient based here
FY2022	$350,000	"the Talking Information Center, Incorporated to provide human voiced broadcasts of local news, articles and items of interest to visually impaired…"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Marshfield received 1.35 times its proportional share of competitive grant awards.

Local road miles **132.0** 49th of 351 · 5.1 per 1,000 residents (226th of 351)	Town-owned bridges, replacement cost **$32.5M** scored exposure $5.4M · one in poor condition	Road-stream crossings **71** 194th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **28.6 sq mi** 2% state-owned	Seasonal homes **10%** share of housing units	Peak service population **28,887** residents plus seasonal	Core infrastructure index **2.40** roads, culverts, dams, coast, flood, energy

Burden index 1.35; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **179 acres** 1.0% of land area · FY2026	State-owned land PILOT, FY2026 **$5,952** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$33.25** statewide $117 · FY2026	New growth per resident **$19,982** FY2017–2025 · 183rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 16.1% of Marshfield's general-fund spending in FY2025, down from 25.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **25.5%** $16.4M of $64.4M · median town 14.1%	FY2016 **20.7%** $17.6M of $85.2M · median town 12.2%	FY2025 **16.1%** $18.9M of $117M · median town 11.5%	Net of state charges, FY2025 **15.0%** FY2010: 24.7% · median town 10.0%

Marshfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $12,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Marshfield's state aid did not keep pace with either price measure: FY2025 aid was 25.8% below its FY2006 aid grown by Boston-area consumer prices and 34.1% below grown by the government price index.

Gross state aid went from $16.4 million in FY2006 to $18.9 million in FY2025, +15.0% in dollars. Flag: in FY2010, $1.2 million of Marshfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+35.1%** $5.6M to $7.6M · all towns +54.0%	All fixed costs, FY2016–25 **+48.6%** $12.3M to $18.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Marshfield's health insurance would have been $7.01 million in FY2025; it was $7.59 million, $573,000 above the path. Its fixed costs would have been $15.4 million in FY2025; it was $18.3 million, $2.92 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Marshfield came to $850,000, 43.1% of the $1.97 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$850,000	43.1%	28.2%
Placed in the town	$3.5M	177.6%	42.3%
Everything placed	$3.5M	177.6%	45.2%

SCHOOLS

Marshfield's required school contribution is 3.2% of median household income, 33rd highest of 351.

Chapter 70 aid, FY2026 **$16.3M** to the town's district	Required local contribution **$42.6M** FY2026
Share of household income **3.2%** 33rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Marshfield runs its own school district and also belongs to South Shore; Marshfield accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Marshfield received $13.7 million in earmarks placed in the town and competitive grants over ten years, 7% more than the $12.8 million its size, need and institutions predict.

PEERS

Marshfield ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Marshfield this town	**38**	**$9,344**	**$361**	**$162**	**1.35**	**3.2%**
Sandwich peer	30	$7,257	$332	$24.72	0.71	2.7%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Bourne peer	30	$6,777	$185	$55.96	0.51	2.9%
Dartmouth best in class of 30	29	$6,506	$296	$157	0.73	3.6%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Mashpee

Town · Barnstable County · 15,384 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Barnstable · David T. Vieira

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Mashpee Public Schools, the town's own district

Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Orleans, Provincetown and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Mashpee scores 26 on the Fairness Index for all state aid and 22 for discretionary money. Fifty is a fair share.

ALL STATE AID

26 / 100

342nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	29	30	22

Rank under other weightings: 331st to 343rd.

Stable low: below 45 under every weighting

Mashpee received less than its share of state aid on all four measures; its blended score of 26 stays between 24 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

22 / 100

306th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	27	19	20

Rank under other weightings: 303rd to 309th.

Stable low: below 45 under every weighting

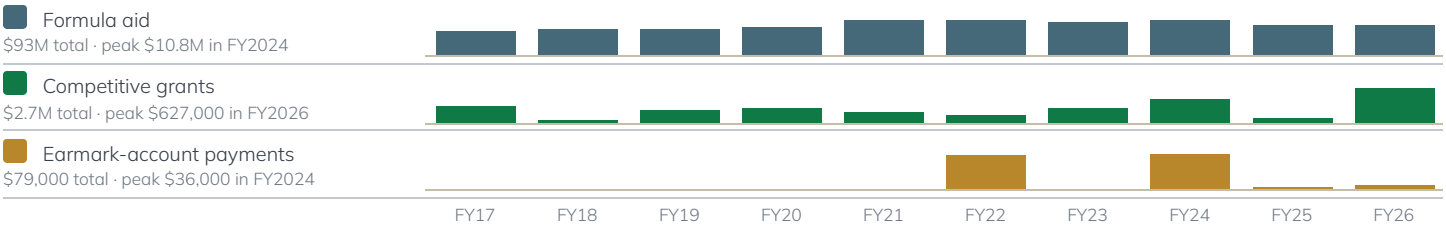
Mashpee received less than its share of discretionary money on all four measures; its blended score of 22 stays between 20 and 23 under every weighting tested.

STATE MONEY, FY2017–FY2026

Mashpee's town government and school districts received $93 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$93M	**$2.7M**	**$79,000**
$6,045 per resident (334th of 351) · gross	$173 per resident (268th of 351)	$5.12 per resident (285th of 351)

Competitive grants to Mashpee peaked in FY2026 at $627,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.8 million, are not shown.

EARMARKS

Mashpee received $192,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$192,000	**$192,000**	**$192,000**	**Not a member**
$12.51 per resident (292nd of 351)	$12.51 per resident (301st of 351)	$12.51 per resident (302nd of 351)	35 municipalities had none

Placed in the town: eight clauses in seven of ten budgets; the most recent in FY2026. Every one names Mashpee directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$35,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to..."	Enacted names the town
FY2025	$30,000	"the Friends of the Mashpee National Wildlife Refuge, Inc. for design and construction plans of a new visitor center on land provided by Mashpee for..."	Enacted names the town
FY2023	$25,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to..."	Enacted names the town
FY2022	$25,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to..."	Enacted names the town
FY2020	$25,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction programs in school districts including, but not limited to, Monomoy regional..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Mashpee received 72% of its proportional share of competitive grant awards.

Local road miles **114.6** 68th of 351 · 7.4 per 1,000 residents (147th of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $408,000 · none in poor condition	Road-stream crossings **44** 284th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **23.4 sq mi** 7% state-owned	Seasonal homes **30%** share of housing units	Peak service population **22,243** residents plus seasonal	Core infrastructure index **1.41** roads, culverts, dams, coast, flood, energy

Burden index 0.72; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,139 acres** 7.6% of land area · FY2026	State-owned land PILOT, FY2026 **$1.1M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$954** statewide $117 · FY2026	New growth per resident **$51,408** FY2017–2025 · 35th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.1% of Mashpee's general-fund spending in FY2025, down from 15.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.2%** $6.3M of $41.8M · median town 14.1%	FY2016 **12.0%** $6.7M of $56.1M · median town 12.2%	FY2025 **10.1%** $7.6M of $76M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 11.9% · median town 10.0%

Mashpee's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $256,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Mashpee's state aid did not keep pace with either price measure: FY2025 aid was 22.2% below its FY2006 aid grown by Boston-area consumer prices and 30.9% below grown by the government price index.

Gross state aid went from $6.3 million in FY2006 to $7.6 million in FY2025, +20.7% in dollars. Flag: in FY2010, $944,000 of Mashpee's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+43.7%** $5.9M to $8.5M · all towns +54.0%	All fixed costs, FY2016–25 **+51.3%** $9.6M to $14.6M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Mashpee's health insurance would have been $7.37 million in FY2025; it was $8.48 million, $1.11 million above the path. Its fixed costs would have been $12 million in FY2025; it was $14.6 million, $2.54 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Mashpee came to $188,000, 7.3% of the $2.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$188,000	7.3%	28.2%
Placed in the town	$188,000	7.3%	42.3%
Everything placed	$188,000	7.3%	45.2%

SCHOOLS

Mashpee's required school contribution is 2.8% of median household income, 124th highest of 351.

Chapter 70 aid, FY2026 **$5.5M** to the town's district	Required local contribution **$19.2M** FY2026
Share of household income **2.8%** 124th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Mashpee runs its own school district and also belongs to Cape Cod; Mashpee accounts for 8% of that district's foundation budget.

EXPECTED AND ACTUAL

Mashpee received $3.4 million in earmarks placed in the town and competitive grants over ten years, 35% of the $9.8 million its size, need and institutions predict.

PEERS

Mashpee ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Mashpee this town	**26**	**$6,045**	**$173**	**$12.51**	**0.72**	**2.8%**
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Bourne peer	30	$6,777	$185	$55.96	0.51	2.9%
Harwich peer	24	$5,502	$93.86	$4.93	0.59	2.8%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Mattapoisett

Town · Plymouth County · 6,634 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
10th Bristol · Mark D. Sylvia

STATE SENATE
Second Bristol and Plymouth · Mark C. Montigny

SCHOOL DISTRICTS
Mattapoisett Public Schools, the town's own district
Old Rochester Regional School District, shared with Marion and Rochester
Old Colony Regional Vocational Technical School District, vocational, shared with Acushnet, Carver, Lakeville and Rochester

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Mattapoisett scores 33 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

282nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	44	33	25

Rank under other weightings: 271st to 294th.

Stable low: below 45 under every weighting

Mattapoisett received less than its share of state aid on all four measures; its blended score of 33 stays between 30 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100

52nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
88	93	81	84

Rank under other weightings: 47th to 57th.

Stable high: above 55 under every weighting

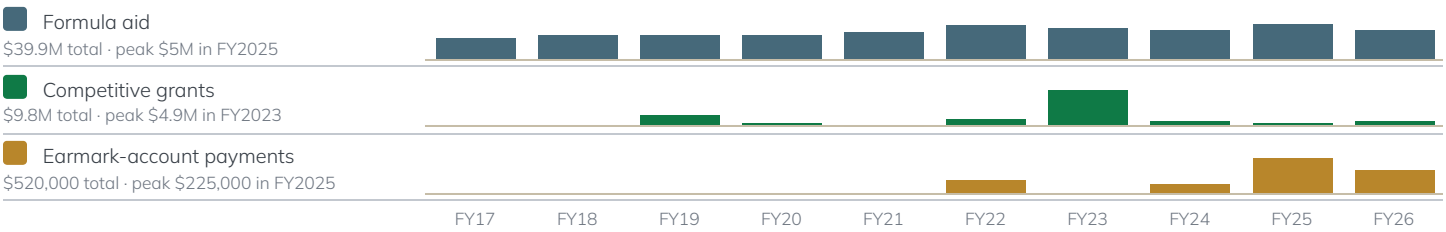
Mattapoisett received more than its share of discretionary money on all four measures; its blended score of 86 stays between 84 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Mattapoisett's town government and school districts received $39.9 million in formula aid and $9.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$39.9M	**$9.8M**	**$520,000**
$6,007 per resident (336th of 351) · gross	$1,477 per resident (57th of 351)	$78.34 per resident (35th of 351)

Competitive grants to Mattapoisett peaked in FY2023 at $4.9 million, 50% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.5 million, are not shown.

EARMARKS

Mattapoisett received $120,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$120,000	**$120,000**	**$120,000**	**Not a member**
$18.09 per resident (272nd of 351)	$18.09 per resident (282nd of 351)	$18.09 per resident (282nd of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Mattapoisett directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$70,000	"preliminary design and engineering work for the replacement of the Pine Island brook culvert on Pine Island road in the town of Mattapoisett"	Enacted names the town
FY2023	$50,000	"the installation of fire suppression systems at the Mattapoisett highway equipment facility"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Mattapoisett received 2.08 times its proportional share of competitive grant awards.

Local road miles **43.0** 277th of 351 · 6.5 per 1,000 residents (177th of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $528,000 · none in poor condition	Road-stream crossings **55** 244th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.3 sq mi** 16% state-owned	Seasonal homes **18%** share of housing units	Peak service population **8,173** residents plus seasonal	Core infrastructure index **3.06** roads, culverts, dams, coast, flood, energy

Burden index 2.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,772 acres** 16.0% of land area · FY2026	State-owned land PILOT, FY2026 **$308,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$174** statewide $117 · FY2026	New growth per resident **$38,111** FY2017–2025 · 65th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.3% of Mattapoisett's general-fund spending in FY2025, up from 6.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.1%** $1.1M of $17.6M · median town 14.1%	FY2016 **5.9%** $1.4M of $23.6M · median town 12.2%	FY2025 **6.3%** $2M of $32.5M · median town 11.5%	Net of state charges, FY2025 **5.8%** FY2010: 4.5% · median town 10.0%

Mattapoisett's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Mattapoisett's state aid kept pace with both price measures: FY2025 aid was 23.7% above its FY2006 aid grown by Boston-area consumer prices and 10.0% above grown by the government price index.

Gross state aid went from $1.1 million in FY2006 to $2 million in FY2025, +91.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+5.7%** $1.9M to $2M · all towns +54.0%	All fixed costs, FY2016–25 **+37.5%** $3.2M to $4.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Mattapoisett's health insurance would have been $2.32 million in FY2025; it was $1.96 million, $357,000 below the path. Its fixed costs would have been $3.98 million in FY2025; it was $4.39 million, $402,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Mattapoisett came to $120,000, 113.8% of the $105,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$120,000	113.8%	28.2%
Placed in the town	$120,000	113.8%	42.3%
Everything placed	$120,000	113.8%	45.2%

SCHOOLS

Mattapoisett's required school contribution is 2.2% of

EXPECTED AND ACTUAL

Mattapoisett received $10.2 million in earmarks placed in the town and competitive grants over ten

median household income, 292nd highest of 351.

Chapter 70 aid, FY2026 **$2.2M** to the town's district	Required local contribution **$8.4M** FY2026
Share of household income **2.2%** 292nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Mattapoisett runs its own district for some grades and belongs to Old Rochester and Old Colony for others; Mattapoisett accounts for 34% and 6% of their foundation budgets, in that order.

years, 2.4 times the $4.2 million its size, need and institutions predict.

PEERS

Mattapoisett ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Mattapoisett this town	**33**	**$6,007**	**$1,477**	**$18.09**	**2.08**	**2.2%**
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Boxborough peer	34	$8,257	$231	$43.67	0.36	2.8%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Edgartown peer · lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%
Lynnfield peer	30	$7,167	$206	$147	0.81	3.0%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Maynard

Town · Middlesex County · 10,712 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Middlesex · Kate Hogan

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Maynard Public Schools, the town's own district

Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Hudson, Marlborough, Northborough, Southborough and Westborough

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Maynard scores 40 on the Fairness Index for all state aid and 67 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

210th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	42	43	34

Rank under other weightings: 194th to 233rd.

Stable low: below 45 under every weighting

Maynard received less than its share of state aid on all four measures; its blended score of 40 stays between 39 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

67 / 100

119th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
68	68	73	60

Rank under other weightings: 111th to 127th.

Stable high: above 55 under every weighting

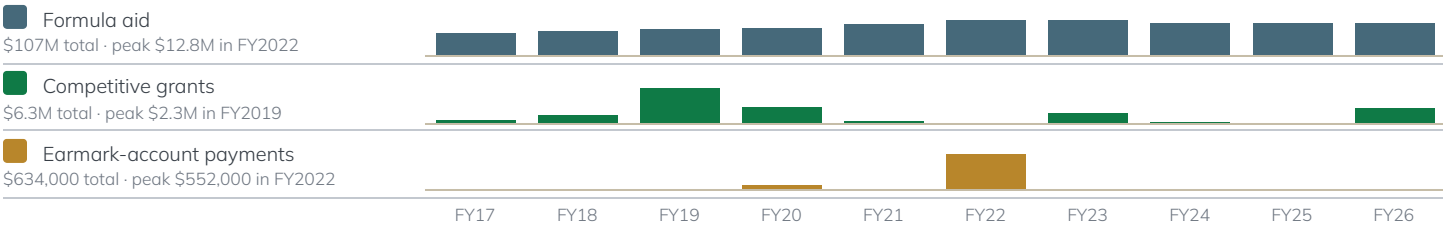
Maynard received more than its share of discretionary money on all four measures; its blended score of 67 stays between 65 and 69 under every weighting tested.

STATE MONEY, FY2017–FY2026

Maynard's town government and school districts received $107 million in formula aid and $6.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$107M	**$6.3M**	**$634,000**
$10,015 per resident (176th of 351) · gross	$584 per resident (125th of 351)	$59.14 per resident (59th of 351)

Competitive grants to Maynard peaked in FY2019 at $2.3 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.9 million, are not shown.

EARMARKS

Maynard received $1.1 million in local earmarks naming the town, $1 million placed in the town and $1.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$1M**	**$1.1M**	**Not a member**
$105 per resident (44th of 351)	$95.69 per resident (75th of 351)	$105 per resident (70th of 351)	35 municipalities had none

Placed in the town: 14 clauses in ten of ten budgets; the most recent in FY2026. Every one names Maynard directly.

Names the town includes $100,000 in clauses that name Maynard but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $100,000 in two clauses for state facilities located in Maynard (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"the town of Maynard for the continuation of mitigating water resource issues"	Enacted names the town
FY2017	$125,000	"upgrades to the chlorination and dechlorination systems at the wastewater treatment plant in the town of Maynard"	Enacted names the town
FY2024	$100,000	"Cooperative Development Institute, Inc. for the Assabet Co-op Market in the town of Maynard for construction and support necessary to open and..."	Enacted names the town
FY2021	$100,000	"the town of Maynard for linking elderly and commuter services to the Massachusetts Bay Transportation Authority"	Enacted names the town
FY2019	$100,000	"the town of Maynard for fire station improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Maynard received 2.79 times its proportional share of competitive grant awards.

Local road miles **41.1** 289th of 351 · 3.8 per 1,000 residents (286th of 351)	Town-owned bridges, replacement cost **$22.2M** scored exposure $4.9M · none in poor condition	Road-stream crossings **35** 306th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **5.2 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **10,818** residents plus seasonal	Core infrastructure index **3.05** roads, culverts, dams, coast, flood, energy

Burden index 2.79; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$19,096** FY2017–2025 · 200th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.3% of Maynard's general-fund spending in FY2025, down from 17.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.6%** $5.8M of $33.1M · median town 14.1%	FY2016 **19.2%** $7.3M of $38M · median town 12.2%	FY2025 **15.3%** $8.1M of $53.1M · median town 11.5%	Net of state charges, FY2025 **11.8%** FY2010: 18.3% · median town 10.0%

Maynard's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $426,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Maynard's state aid did not keep pace with either price measure: FY2025 aid was 10.1% below its FY2006 aid grown by Boston-area consumer prices and 20.1% below grown by the government price index.

Gross state aid went from $5.8 million in FY2006 to $8.1 million in FY2025, +39.4% in dollars. Flag: in FY2010, $898,000 of Maynard's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+38.4%** $4.5M to $6.2M · all towns +54.0%	All fixed costs, FY2016–25 **+46.5%** $7.1M to $10.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Maynard's health insurance would have been $5.59 million in FY2025; it was $6.20 million, $604,000 above the path. Its fixed costs would have been $8.86 million in FY2025; it was $10.4 million, $1.54 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Maynard came to $925,000, 53.8% of the $1.72 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$925,000	53.8%	28.2%
Placed in the town	$825,000	48.0%	42.3%
Everything placed	$925,000	53.8%	45.2%

SCHOOLS

Maynard's required school contribution is 2.5% of median household income, 240th highest of 351.

Chapter 70 aid, FY2026 **$6.4M** to the town's district	Required local contribution **$14.7M** FY2026
Share of household income **2.5%** 240th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Maynard runs its own school district and also belongs to Assabet Valley; Maynard accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Maynard received $8 million in earmarks placed in the town and competitive grants over ten years, 9% more than the $7.4 million its size, need and institutions predict.

PEERS

Maynard ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Maynard this town	**40**	**$10,015**	**$584**	**$95.69**	**2.79**	**2.5%**
West Boylston peer	35	$8,612	$157	$148	0.30	3.0%
Merrimac peer	47	$12,597	$215	$48.54	1.78	2.5%
Amesbury peer	39	$9,706	$676	$64.69	2.17	2.8%
Winthrop peer	40	$8,903	$365	$158	0.60	2.4%
Hudson peer	42	$10,896	$229	$66.49	0.91	3.1%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Deerfield lowest in class of 30	44	$9,461	$1,195	$6.46	2.83	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Medfield

Town · Norfolk County · 13,068 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Norfolk · Joshua Tarsky 51% of residents
9th Norfolk · Marcus S. Vaughn 49% of residents

Medfield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Medfield Public Schools, the town's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medway, Millis, Norfolk, North Attleborough, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Medfield scores 38 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

243rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	58	25	34

Rank under other weightings: 197th to 265th.

Stable low: below 45 under every weighting

Medfield received less than its share of state aid on three of four measures; its blended score of 38 stays between 33 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100

142nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	75	56	53

Rank under other weightings: 131st to 159th.

Stable high: above 55 under every weighting

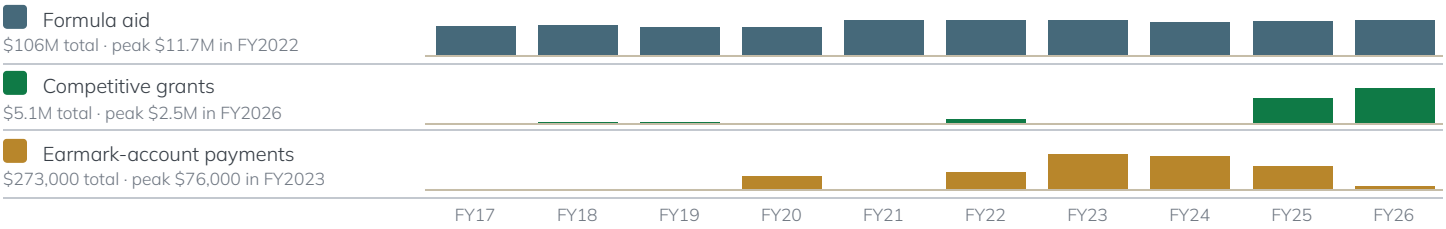
Medfield received more than its share of discretionary money on all four measures; its blended score of 59 stays between 56 and 63 under every weighting tested.

STATE MONEY, FY2017–FY2026

Medfield's town government and school districts received $106 million in formula aid and $5.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$106M	**$5.1M**	**$273,000**
$8,137 per resident (246th of 351) · gross	$388 per resident (174th of 351)	$20.86 per resident (198th of 351)

Competitive grants to Medfield peaked in FY2026 at $2.5 million, 50% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.6 million, are not shown.

EARMARKS

Medfield received $957,000 in local earmarks naming the town, $607,000 placed in the town and $957,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$957,000	**$607,000**	**$957,000**	**Not a member**
$73.25 per resident (79th of 351)	$46.47 per resident (181st of 351)	$73.25 per resident (116th of 351)	35 municipalities had none

Placed in the town: 16 clauses in eight of ten budgets; the most recent in FY2026. Every one names Medfield directly.

Names the town includes $350,000 in clauses that name Medfield but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $350,000 in two clauses for state facilities located in Medfield (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"improvements to Metacomet park in Medfield"	Enacted names the town
FY2020	$70,000	"a planning and design study for the intersection of route 27 and West street in Medfield"	Enacted names the town
FY2026	$50,000	"the Bellforge Arts Center in the town of Medfield for a summer sounds concert series"	Enacted names the town
FY2025	$50,000	"improvements to the Kingsbury Grist Mill, Dwight-Derby House and Medfield Historical Society buildings in the town of Medfield"	Enacted names the town
FY2024	$50,000	"the hiring of a sustainability coordinator in the town of Medfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Medfield received 2.14 times its proportional share of competitive grant awards.

Local road miles **76.5** 170th of 351 · 5.9 per 1,000 residents (196th of 351)	Town-owned bridges, replacement cost **$8.5M** scored exposure $1.4M · none in poor condition	Road-stream crossings **87** 148th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **14.4 sq mi** 4% state-owned	Seasonal homes **1%** share of housing units	Peak service population **13,201** residents plus seasonal	Core infrastructure index **0.34** roads, culverts, dams, coast, flood, energy

Burden index 2.14; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **236 acres** 2.6% of land area · FY2026	State-owned land PILOT, FY2026 **$78,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$329** statewide $117 · FY2026	New growth per resident **$20,066** FY2017–2025 · 180th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.0% of Medfield's general-fund spending in FY2025, down from 16.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **16.0%** $7.1M of $44.5M · median town 14.1%	FY2016 **13.2%** $7.4M of $55.9M · median town 12.2%	FY2025 **12.0%** $8.8M of $73.8M · median town 11.5%	Net of state charges, FY2025 **11.0%** FY2010: 15.8% · median town 10.0%

Medfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $44,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Medfield's state aid did not keep pace with either price measure: FY2025 aid was 20.1% below its FY2006 aid grown by Boston-area consumer prices and 29.0% below grown by the government price index.

Gross state aid went from $7.1 million in FY2006 to $8.8 million in FY2025, +23.9% in dollars. Flag: in FY2010, $654,000 of Medfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.7%** $3.7M to $4.9M · all towns +54.0%	All fixed costs, FY2016–25 **+54.8%** $6.4M to $10M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Medfield's health insurance would have been $4.58 million in FY2025; it was $4.86 million, $288,000 above the path. Its fixed costs would have been $8.04 million in FY2025; it was $9.97 million, $1.93 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Medfield came to $892,000, 74.4% of the $1.20 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$892,000	74.4%	28.2%
Placed in the town	$542,000	45.2%	42.3%
Everything placed	$892,000	74.4%	45.2%

SCHOOLS

Medfield's required school contribution is 2.3% of median household income, 271st highest of 351.

Chapter 70 aid, FY2026 **$7.3M** to the town's district	Required local contribution **$25.9M** FY2026
Share of household income **2.3%** 271st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Medfield runs its own school district and also belongs to Norfolk County and Tri County; Medfield accounts for 2% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Medfield received $5.7 million in earmarks placed in the town and competitive grants over ten years, 67% more than the $3.4 million its size, need and institutions predict.

PEERS

Medfield ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Medfield this town	**38**	**$8,137**	**$388**	**$46.47**	**2.14**	**2.3%**
Norwell peer	35	$7,878	$687	$57.61	1.24	3.4%
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Hopkinton peer	31	$7,048	$297	$94.08	0.33	3.1%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Medford

City · Middlesex County · 59,354 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

35th Middlesex · Paul J. Donato 45% of residents
34th Middlesex · Christine P. Barber 37% of residents
23rd Middlesex · Sean Garballey 18% of residents

Medford is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Second Middlesex · Patricia D. Jehlen

SCHOOL DISTRICTS

Medford Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Medford scores 32 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

292nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	29	39	33

Rank under other weightings: 245th to 327th.

Stable low: below 45 under every weighting

Medford received less than its share of state aid on all four measures; its blended score of 32 stays between 29 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

178th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	50	56	55

Rank under other weightings: 164th to 188th.

Near fair: between 45 and 55 under every weighting

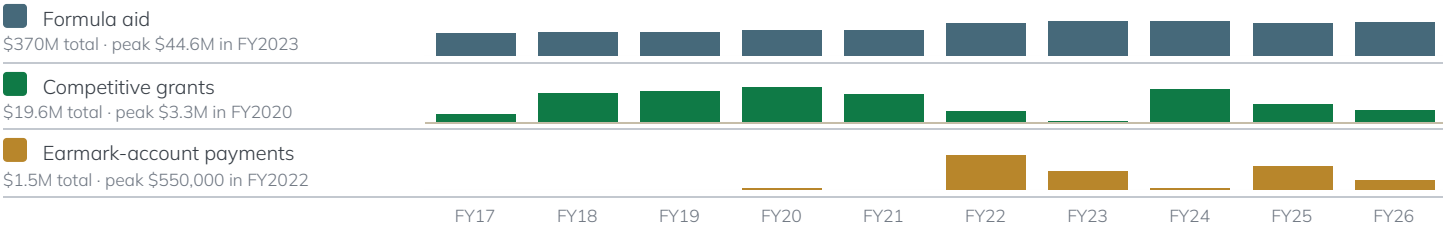
Medford received more than its share of discretionary money on three of four measures; its blended score of 52 stays between 49 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Medford's town government and school districts received $370 million in formula aid and $19.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$370M	$19.6M	$1.5M
$6,237 per resident (328th of 351) · gross	$331 per resident (197th of 351)	$25.16 per resident (174th of 351)

Competitive grants to Medford were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $47.8 million, are not shown.

EARMARKS

Medford received $2.7 million in local earmarks naming the town, $2.9 million placed in the town and $3.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.7M	$2.9M	$3.1M	Not a member
$44.89 per resident (163rd of 351)	$49.53 per resident (174th of 351)	$52.47 per resident (168th of 351)	35 municipalities had none

Placed in the town: 50 clauses in ten of ten budgets; the most recent in FY2026. $2.5 million came in clauses that name Medford; the other $450,000 went to organizations based in Medford, some of which serve a wider area.

Names the town includes $175,000 in clauses that name Medford but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $175,000 in two clauses for state facilities located in Medford (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$175,000	"the operation of the Portal to Hope Corp"	Enacted recipient based here
FY2023	$150,000	"pedestrian safety improvements and the installation of 3 enhanced crossings for users of all abilities at the following intersections in the city of…"	Enacted names the town
FY2020	$150,000	"the Chevalier Theater rehabilitation project in the city of Medford"	Enacted names the town
FY2019	$150,000	"the Portal to Hope"	Enacted recipient based here
FY2021	$135,000	"a rehabilitation project for the Chevalier theater in Medford"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Medford received 2.03 times its proportional share of competitive grant awards.

Local road miles **93.6** 112th of 351 · 1.6 per 1,000 residents (341st of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $590,000 · none in poor condition	Road-stream crossings **64** 218th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **8.1 sq mi** 23% state-owned	Seasonal homes **0%** share of housing units	Peak service population **59,396** residents plus seasonal	Core infrastructure index **2.06** roads, culverts, dams, coast, flood, energy

Burden index 2.03; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **298 acres** 5.7% of land area · FY2026	State-owned land PILOT, FY2026 **$98,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$330** statewide $117 · FY2026	New growth per resident **$25,468** FY2017–2025 · 135th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 16.5% of Medford's general-fund spending in FY2025, down from 23.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.0%** $29.4M of $128M · median town 14.1%	FY2016 **18.7%** $26.7M of $143M · median town 12.2%	FY2025 **16.5%** $34M of $205M · median town 11.5%	Net of state charges, FY2025 **10.2%** FY2010: 13.2% · median town 10.0%

Medford's state aid did not keep pace with either price measure: FY2025 aid was 25.5% below its FY2006 aid grown by Boston-area consumer prices and 33.8% below grown by the government price index.

Gross state aid went from $29.4 million in FY2006 to $34 million in FY2025, +15.6% in dollars. Flag: in FY2010, $3.4 million of Medford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.9%** $19M to $26.6M · all towns +54.0%	All fixed costs, FY2016–25 **+46.2%** $31.3M to $45.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Medford's health insurance would have been $23.7 million in FY2025; it was $26.6 million, $2.86 million above the path. Its fixed costs would have been $39.1 million in FY2025; it was $45.8 million, $6.66 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Medford came to $2.3 million, 30.5% of the $7.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.3M	30.5%	28.2%
Placed in the town	$2.6M	34.2%	42.3%
Everything placed	$2.8M	36.5%	45.2%

SCHOOLS

Medford's required school contribution is 1.9% of median household income, 315th highest of 351.

Chapter 70 aid, FY2026 **$18.6M** to the town's district	Required local contribution **$60.8M** FY2026
Share of household income **1.9%** 315th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Medford runs its own school district.

EXPECTED AND ACTUAL

Medford received $22.9 million in earmarks placed in the town and competitive grants over ten years, 64% more than the $14 million its size, need and institutions predict.

PEERS

Medford ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Medford this town	**32**	**$6,237**	**$331**	**$49.53**	**2.03**	**1.9%**
Plymouth peer	28	$7,006	$268	$53.91	0.73	3.0%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Medway

Town · Norfolk County · 13,436 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Norfolk · Jeffrey N. Roy 77% of residents
8th Worcester · Michael J. Soter 23% of residents

Medway is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS

Medway Public Schools, the town's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Millis, Norfolk, North Attleborough, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Medway scores 49 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

130th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	64	39	47

Rank under other weightings: 101st to 157th.

Near fair: between 45 and 55 under every weighting

Medway received less than its share of state aid on three of four measures; its blended score of 49 stays between 45 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

159th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	66	55	50

Rank under other weightings: 148th to 179th.

Weighting-dependent: the range crosses the 45–55 band

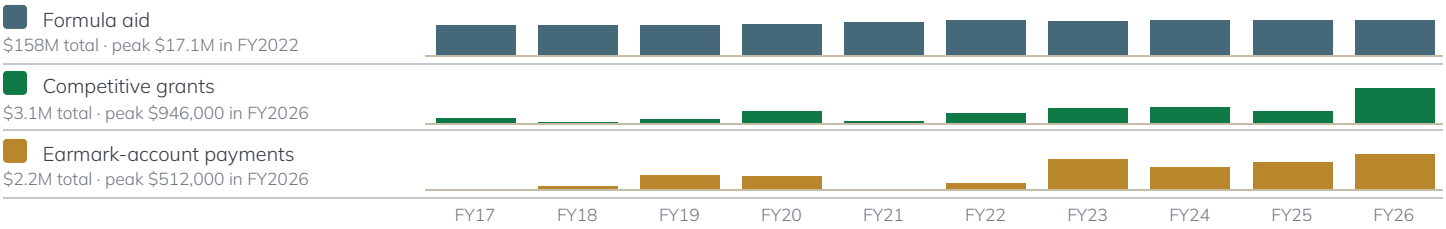
Medway received more than its share of discretionary money on two of four measures; its blended score of 55 stays between 52 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Medway's town government and school districts received $158 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$158M	**$3.1M**	**$2.2M**
$11,769 per resident (134th of 351) · gross	$234 per resident (233rd of 351)	$166 per resident (9th of 351)

Competitive grants to Medway peaked in FY2026 at $946,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.1 million, are not shown.

EARMARKS

Medway received $2.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.4M	**$2.4M**	**$2.4M**	**Not a member**
$182 per resident (10th of 351)	$182 per resident (13th of 351)	$182 per resident (22nd of 351)	35 municipalities had none

Placed in the town: 34 clauses in ten of ten budgets; the most recent in FY2026. Every one names Medway directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"Medway public schools for mental health programs"	Enacted names the town
FY2025	$200,000	"Medway public schools for mental health programs"	Enacted names the town
FY2024	$200,000	"Medway public schools for mental health programs"	Enacted names the town
FY2017	$200,000	"Medway public schools"	Enacted names the town
FY2020	$170,000	"the town of Medway for the purchase of public safety equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Medway received 1.08 times its proportional share of competitive grant awards.

Local road miles **81.1** 152nd of 351 · 6.0 per 1,000 residents (187th of 351)	Town-owned bridges, replacement cost **$9.4M** scored exposure $2.2M · none in poor condition	Road-stream crossings **63** 219th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **11.5 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **13,436** residents plus seasonal	Core infrastructure index **1.06** roads, culverts, dams, coast, flood, energy

Burden index 1.08; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$46,720** FY2017–2025 · 42nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 19.5% of Medway's general-fund spending in FY2025, down from 24.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.1%** $8.4M of $34.7M · median town 14.1%	FY2016 **25.6%** $11.8M of $46.2M · median town 12.2%	FY2025 **19.5%** $13.3M of $68.1M · median town 11.5%	Net of state charges, FY2025 **18.0%** FY2010: 27.1% · median town 10.0%

Medway's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $590,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Medway's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 2.3% above its FY2006 aid grown by Boston-area consumer prices and 9.1% below grown by the government price index.

Gross state aid went from $8.4 million in FY2006 to $13.3 million in FY2025, +58.7% in dollars. Flag: in FY2010, $452,000 of Medway's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+36.1%** $4.3M to $5.8M · all towns +54.0%	All fixed costs, FY2016–25 **+55.2%** $7M to $10.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Medway's health insurance would have been $5.37 million in FY2025; it was $5.85 million, $483,000 above the path. Its fixed costs would have been $8.72 million in FY2025; it was $10.8 million, $2.12 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Medway came to $2.1 million, 132.1% of the $1.55 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.1M	132.1%	28.2%
Placed in the town	$2.1M	132.1%	42.3%
Everything placed	$2.1M	132.1%	45.2%

SCHOOLS

Medway's required school contribution is 2.8% of median household income, 126th highest of 351.

Chapter 70 aid, FY2026 **$12M** to the town's district	Required local contribution **$23.1M** FY2026
Share of household income **2.8%** 126th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–13%** after inflation

Medway runs its own school district and also belongs to Tri County and Norfolk County; Medway accounts for 9% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Medway received $5.8 million in earmarks placed in the town and competitive grants over ten years, 23% more than the $4.7 million its size, need and institutions predict.

PEERS

Medway ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Medway this town	**49**	**$11,769**	**$234**	**$182**	**1.08**	**2.8%**
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Rehoboth peer	33	$7,696	$69.78	$12.80	0.22	2.8%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Holliston peer	41	$9,911	$189	$129	0.85	3.1%
Millis best in class of 30	39	$9,221	$150	$151	0.75	2.6%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Melrose

City · Middlesex County · 29,650 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
32nd Middlesex · Kate Lipper-Garabedian

STATE SENATE
Fifth Middlesex · Jason M. Lewis

SCHOOL DISTRICTS
Melrose Public Schools, the city's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, North Reading, Reading, Revere, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Melrose scores 35 on the Fairness Index for all state aid and 62 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

259th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	45	31	34

Rank under other weightings: 252nd to 269th.

Stable low: below 45 under every weighting

Melrose received less than its share of state aid on all four measures; its blended score of 35 stays between 33 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

62 / 100

133rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	68	67	57

Rank under other weightings: 125th to 143rd.

Stable high: above 55 under every weighting

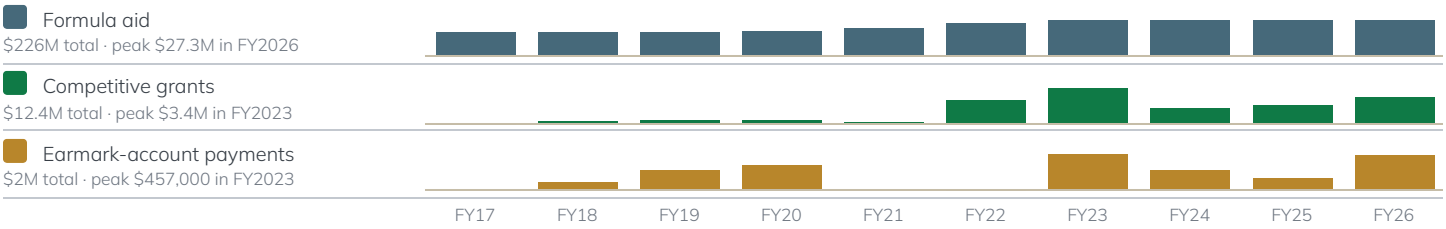
Melrose received more than its share of discretionary money on all four measures; its blended score of 62 stays between 58 and 65 under every weighting tested.

STATE MONEY, FY2017–FY2026

Melrose's town government and school districts received $226 million in formula aid and $12.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$226M	$12.4M	$2M
$7,621 per resident (271st of 351) · gross	$417 per resident (163rd of 351)	$65.97 per resident (44th of 351)

Competitive grants to Melrose peaked in FY2023 at $3.4 million, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18 million, are not shown.

EARMARKS

Melrose received $1.9 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.9M	$1.9M	$1.9M	Not a member
$63.68 per resident (103rd of 351)	$63.68 per resident (133rd of 351)	$63.68 per resident (138th of 351)	35 municipalities had none

Placed in the town: 27 clauses in ten of ten budgets; the most recent in FY2026. Every one names Melrose directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$200,000	"the Melrose center for the performing arts"	Enacted names the town
FY2020	$150,000	"the repair of the stone wall of the West Wyoming Municipal and Veterans' Cemetery in the city of Melrose"	Enacted names the town
FY2026	$100,000	"Melrose public schools for capital improvements"	Enacted names the town
FY2020	$100,000	"facility accessibility improvements for Follow Your Art Community Studios, Inc. in Melrose"	Enacted names the town
FY2019	$100,000	"the restoration of Memorial Hall in the city of Melrose"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Melrose received 2.22 times its proportional share of competitive grant awards.

Local road miles **71.8** 182nd of 351 · 2.4 per 1,000 residents (331st of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **14** 333rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.7 sq mi** 7% state-owned	Seasonal homes **0%** share of housing units	Peak service population **29,719** residents plus seasonal	Core infrastructure index **2.86** roads, culverts, dams, coast, flood, energy

Burden index 2.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5 acres** 0.2% of land area · FY2026	State-owned land PILOT, FY2026 **$2,173** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$435** statewide $117 · FY2026	New growth per resident **$17,092** FY2017–2025 · 224th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.6% of Melrose's general-fund spending in FY2025, down from 23.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.6%** $12.9M of $54.6M · median town 14.1%	FY2016 **17.5%** $13.8M of $78.6M · median town 12.2%	FY2025 **17.6%** $20.4M of $116M · median town 11.5%	Net of state charges, FY2025 **13.1%** FY2010: 15.3% · median town 10.0%

Melrose's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $398,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Melrose's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 1.9% above its FY2006 aid grown by Boston-area consumer prices and 9.5% below grown by the government price index.

Gross state aid went from $12.9 million in FY2006 to $20.4 million in FY2025, +58.0% in dollars. Flag: in FY2010, $434,000 of Melrose's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+35.2%** $10.5M to $14.2M · all towns +54.0%	All fixed costs, FY2016–25 **+39.3%** $17.3M to $24M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Melrose's health insurance would have been $13.1 million in FY2025; it was $14.2 million, $1.09 million above the path. Its fixed costs would have been $21.6 million in FY2025; it was $24 million, $2.49 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Melrose came to $1.6 million, 44.3% of the $3.70 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.6M	44.3%	28.2%
Placed in the town	$1.6M	44.3%	42.3%
Everything placed	$1.6M	44.3%	45.2%

SCHOOLS

Melrose's required school contribution is 2.7% of median household income, 158th highest of 351.

Chapter 70 aid, FY2026 **$13.7M** to the town's district	Required local contribution **$44.8M** FY2026
Share of household income **2.7%** 158th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Melrose runs its own school district and also belongs to Northeast Metropolitan; Melrose accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Melrose received $14.3 million in earmarks placed in the town and competitive grants over ten years, 70% more than the $8.4 million its size, need and institutions predict.

PEERS

Melrose ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Melrose this town	**35**	**$7,621**	**$417**	**$63.68**	**2.22**	**2.7%**
Chelmsford peer	31	$7,630	$194	$41.84	0.37	3.1%
Wilmington peer	42	$9,651	$202	$31.68	0.32	2.7%
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Arlington peer	32	$7,131	$184	$64.10	0.96	2.2%
Danvers peer	30	$6,947	$129	$53.36	0.20	2.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Mendon

Town · Worcester County · 6,325 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Worcester · Brian W. Murray

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Mendon-Upton Regional School District, shared with Upton

Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Milford, Millbury, Millville and four others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Mendon scores 50 on the Fairness Index for all state aid and 57 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

121st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	58	49	40

Rank under other weightings: 98th to 141st.

Near fair: between 45 and 55 under every weighting

Mendon received less than its share of state aid on two of four measures; its blended score of 50 stays between 47 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

57 / 100

153rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	64	61	45

Rank under other weightings: 142nd to 167th.

Weighting-dependent: the range crosses the 45–55 band

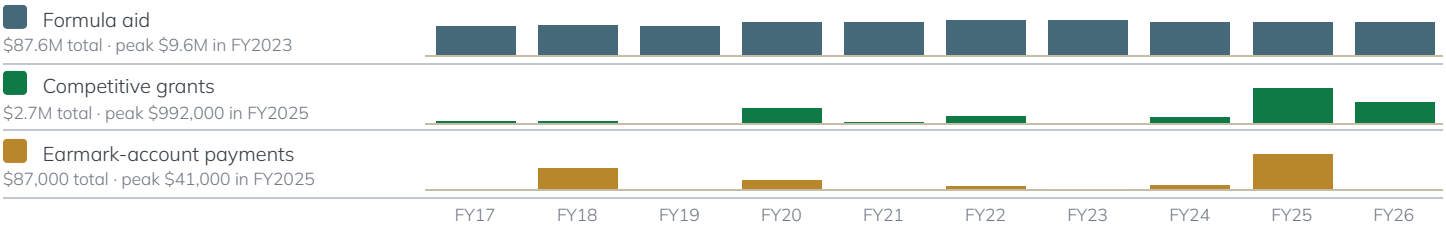
Mendon received more than its share of discretionary money on three of four measures; its blended score of 57 stays between 54 and 60 under every weighting tested.

STATE MONEY, FY2017–FY2026

Mendon's town government and school districts received $87.6 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$87.6M	**$2.7M**	**$87,000**
$13,851 per resident (97th of 351) · gross	$425 per resident (159th of 351)	$13.82 per resident (235th of 351)

Competitive grants to Mendon peaked in FY2025 at $992,000, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.2 million, are not shown.

EARMARKS

Mendon received $718,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$718,000	**$718,000**	**$718,000**	**Not a member**
$113 per resident (33rd of 351)	$113 per resident (54th of 351)	$113 per resident (60th of 351)	35 municipalities had none

Placed in the town: 15 clauses in nine of ten budgets; the most recent in FY2026. Every one names Mendon directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000	"the town of Mendon for a single point entry keycard security system for elementary and middle school buildings and for the Mendon-Upton Regional..."	Enacted names the town
FY2025	$100,000	"Mendon for engineering and planning services related to road improvements"	Enacted names the town
FY2023	$75,000	"improvements to the town hall and police station campus in the town of Mendon"	Enacted names the town
FY2024	$50,000	"improvements to the town hall and police station campus in Mendon"	Enacted names the town
FY2022	$50,000	"a feasibility study for the town of Mendon to determine ways to expand and improve its public water supply and for capital improvements to the town's..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Mendon received about its proportional share of competitive grant awards.

Local road miles **56.0** 226th of 351 · 8.8 per 1,000 residents (122nd of 351)	Town-owned bridges, replacement cost **$6.4M** scored exposure $1.5M · two in poor condition	Road-stream crossings **63** 219th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **17.8 sq mi** 2% state-owned	Seasonal homes **3%** share of housing units	Peak service population **6,536** residents plus seasonal	Core infrastructure index **1.50** roads, culverts, dams, coast, flood, energy

Burden index 1.05; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **171 acres** 1.5% of land area · FY2026	State-owned land PILOT, FY2026 **$7,971** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$46.52** statewide $117 · FY2026	New growth per resident **$27,078** FY2017–2025 · 125th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.6% of Mendon's general-fund spending in FY2025, down from 4.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.3%** $464,000 of $10.8M · median town 14.1%	FY2016 **2.6%** $450,000 of $17.6M · median town 12.2%	FY2025 **2.6%** $625,000 of $24.3M · median town 11.5%	Net of state charges, FY2025 **2.5%** FY2010: 3.3% · median town 10.0%

Mendon's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Mendon's state aid did not keep pace with either price measure: FY2025 aid was 13.2% below its FY2006 aid grown by Boston-area consumer prices and 22.9% below grown by the government price index.

Gross state aid went from $464,000 in FY2006 to $625,000 in FY2025, +34.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+50.6%** $609,000 to $917,000 · all towns +54.0%	All fixed costs, FY2016–25 **+121.8%** $1.1M to $2.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Mendon's health insurance would have been $761,000 in FY2025; it was $917,000, $157,000 above the path. Its fixed costs would have been $1.42 million in FY2025; it was $2.52 million, $1.10 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Mendon came to $592,000, 192.1% of the $308,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$592,000	192.1%	28.2%
Placed in the town	$592,000	192.1%	42.3%
Everything placed	$592,000	192.1%	45.2%

SCHOOLS

Mendon's required school contribution is 3.6% of median household income, 12th highest of 351.

Chapter 70 aid, FY2026 **$5.8M** attributed to the town	Required local contribution **$10.2M** FY2026
Share of household income **3.6%** 12th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

Mendon has no school district of its own. Its pupils attend Mendon, Mendon-Upton and Blackstone Valley; Mendon accounts for 100%, 42% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Mendon received $3.4 million in earmarks placed in the town and competitive grants over ten years, about the $3.5 million its size, need and institutions predict.

PEERS

Mendon ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Mendon this town	**50**	**$13,851**	**$425**	**$113**	**1.05**	**3.6%**
Boylston peer	32	$7,545	$121	$68.71	0.67	2.6%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Marion lowest in class of 30	30	$6,631	$643	$12.24	0.43	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Merrimac

Town · Essex County · 6,748 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Essex · Dawne Shand

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold

SCHOOL DISTRICTS

Pentucket Regional School District, shared with Groveland and West Newbury

Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Newbury, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Merrimac scores 47 on the Fairness Index for all state aid and 33 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

145th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
49	50	49	42

Rank under other weightings: 128th to 157th.

Near fair: between 45 and 55 under every weighting

Merrimac received less than its share of state aid on all four measures; its blended score of 47 stays between 46 and 49 under every weighting tested.

DISCRETIONARY MONEY ONLY

33 / 100

256th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	34	40	27

Rank under other weightings: 246th to 267th.

Stable low: below 45 under every weighting

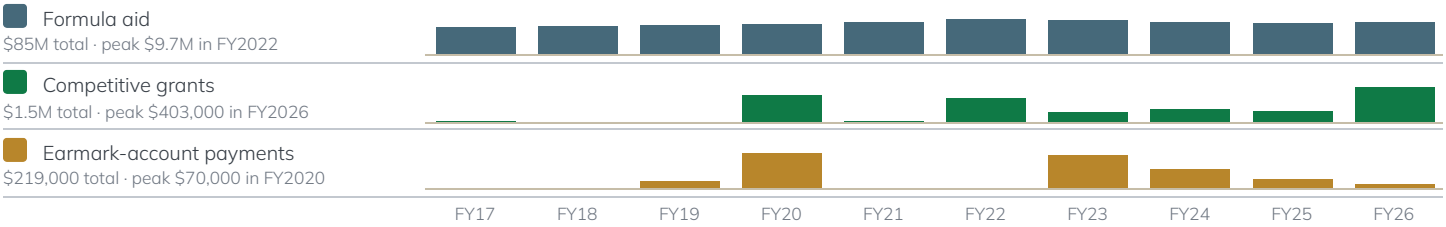
Merrimac received less than its share of discretionary money on all four measures; its blended score of 33 stays between 31 and 35 under every weighting tested.

STATE MONEY, FY2017–FY2026

Merrimac's town government and school districts received $85 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$85M	$1.5M	$219,000
$12,597 per resident (119th of 351) · gross	$215 per resident (244th of 351)	$32.45 per resident (138th of 351)

Competitive grants to Merrimac peaked in FY2026 at $403,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.1 million, are not shown.

EARMARKS

Merrimac received $328,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$328,000	$328,000	$328,000	Not a member
$48.54 per resident (155th of 351)	$48.54 per resident (178th of 351)	$48.54 per resident (181st of 351)	35 municipalities had none

Placed in the town: 14 clauses in nine of ten budgets; the most recent in FY2026. Every one names Merrimac directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$50,000	"the installation of a new generator at the police station in the town of Merrimac"	Enacted names the town
FY2023	$45,000	"Americans with Disabilities Act-compliance improvements at the Helen R. Donaghue school and Dr. Frederick N. Sweetsir school in the town of Merrimac"	Enacted names the town
FY2022	$45,000	"ADA-compliant curb cuts between the Dr. Frederick N. Sweetsir School and Helen R. Donaghue School in the town of Merrimac"	Enacted names the town
FY2024	$30,000	"the purchase and implementation of an emergency communications system in elementary schools in the town of Merrimac"	Enacted names the town
FY2023	$30,000	"the purchase and installation of a fire alarm system at the Dr. Frederick N. Sweetsir elementary school in the town of Merrimac"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Merrimac received 1.78 times its proportional share of competitive grant awards.

Local road miles **38.0** 301st of 351 · 5.6 per 1,000 residents (208th of 351)	Town-owned bridges, replacement cost **$943,000** scored exposure $480,000 · one in poor condition	Road-stream crossings **56** 240th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **8.5 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **6,748** residents plus seasonal	Core infrastructure index **1.08** roads, culverts, dams, coast, flood, energy

Burden index 1.78; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **6 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$5,640** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$887** statewide $117 · FY2026	New growth per resident **$16,624** FY2017–2025 · 232nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.3% of Merrimac's general-fund spending in FY2025, down from 10.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.3%** $1.3M of $12.2M · median town 14.1%	FY2016 **6.6%** $893,000 of $13.6M · median town 12.2%	FY2025 **5.3%** $1.2M of $22.7M · median town 11.5%	Net of state charges, FY2025 **4.7%** FY2010: 9.7% · median town 10.0%

Merrimac's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Merrimac's state aid did not keep pace with either price measure: FY2025 aid was 38.5% below its FY2006 aid grown by Boston-area consumer prices and 45.3% below grown by the government price index.

Gross state aid went from $1.3 million in FY2006 to $1.2 million in FY2025, −4.6% in dollars. Flag: in FY2010, $450,000 of Merrimac's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+72.9%** $231,000 to $400,000 · all towns +54.0%	All fixed costs, FY2016–25 **+98.9%** $790,000 to $1.6M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Merrimac's health insurance would have been $289,000 in FY2025; it was $400,000, $111,000 above the path. Its fixed costs would have been $986,000 in FY2025; it was $1.57 million, $585,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Merrimac came to $313,000, 185.8% of the $169,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$313,000	185.8%	28.2%
Placed in the town	$313,000	185.8%	42.3%
Everything placed	$313,000	185.8%	45.2%

SCHOOLS

Merrimac's required school contribution is 2.5% of median household income, 224th highest of 351.

Chapter 70 aid, FY2026 **$5.7M** attributed to the town	Required local contribution **$8.6M** FY2026
Share of household income **2.5%** 224th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–17%** after inflation

Merrimac has no school district of its own. Its pupils attend Merrimac, Pentucket and Whittier; Merrimac accounts for 100%, 36% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Merrimac received $1.8 million in earmarks placed in the town and competitive grants over ten years, 42% of the $4.3 million its size, need and institutions predict.

PEERS

Merrimac ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Merrimac this town	**47**	**$12,597**	**$215**	**$48.54**	**1.78**	**2.5%**
West Boylston peer	35	$8,612	$157	$148	0.30	3.0%
Deerfield peer	44	$9,461	$1,195	$6.46	2.83	2.4%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Methuen

City · Essex County · 53,475 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

15th Essex · Ryan M. Hamilton 44% of residents
4th Essex · Estela A. Reyes 39% of residents
16th Essex · Francisco E. Paulino 17% of residents

Methuen is split among three House districts. Shares are of 2020 residents.

STATE SENATE

First Essex · Pavel M. Payano

SCHOOL DISTRICTS

Methuen Public Schools, the city's own district
Greater Lawrence Regional Vocational Technical School District, vocational, shared with Andover, Lawrence and North Andover

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Methuen scores 56 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

76th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	53	55	59

Rank under other weightings: 68th to 87th.

Weighting-dependent: the range crosses the 45–55 band

Methuen received more than its share of state aid on all four measures; its blended score of 56 stays between 55 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

251st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	30	40	35

Rank under other weightings: 231st to 265th.

Stable low: below 45 under every weighting

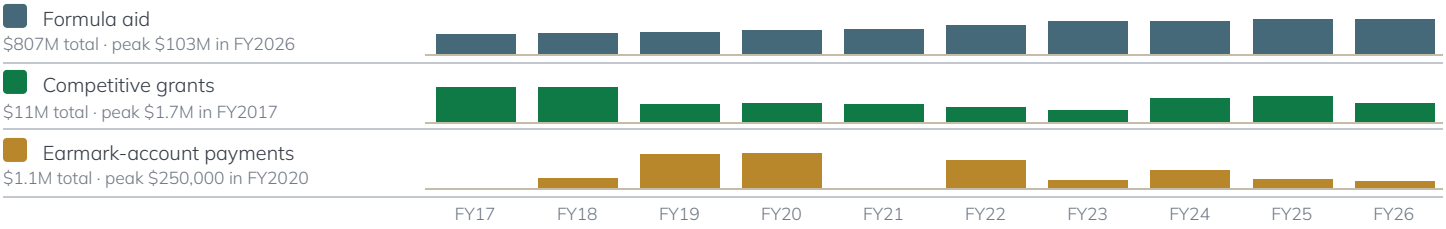
Methuen received less than its share of discretionary money on all four measures; its blended score of 34 stays between 32 and 36 under every weighting tested.

STATE MONEY, FY2017–FY2026

Methuen's town government and school districts received $807 million in formula aid and $11 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$807M	$11M	$1.1M
$15,084 per resident (71st of 351) · gross	$205 per resident (248th of 351)	$20.22 per resident (202nd of 351)

Competitive grants to Methuen were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $60.3 million, are not shown.

EARMARKS

Methuen received $3.3 million in local earmarks naming the town, $3.2 million placed in the town and $3.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.3M	$3.2M	$3.4M	Not a member
$61.28 per resident (114th of 351)	$59.13 per resident (141st of 351)	$63.06 per resident (140th of 351)	35 municipalities had none

Placed in the town: 71 clauses in ten of ten budgets; the most recent in FY2026. $3.1 million came in clauses that name Methuen; the other $95,000 went to organizations based in Methuen, some of which serve a wider area.

Names the town includes $210,000 in clauses that name Methuen but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $210,000 in two clauses for state facilities located in Methuen (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$200,000	"Inspirational Ones, Inc. for rehabilitating the physical facility in which the Methuen Youth and Community Center in the city of Methuen will be..."	Enacted names the town
FY2020	$200,000	"the city of Methuen for resurfacing the outdoor track at Methuen High School"	Enacted names the town
FY2025	$150,000	"Methuen Arlington Neighborhood, Inc. to increase and enhance entrepreneurial opportunities, neighborhood investment, revitalization activities and..."	Enacted names the town
FY2022	$130,000	"Inspirational Ones, Inc. for expanding the staffing and programming at the Methuen Youth and Community Center, for rehabilitating the physical..."	Enacted names the town
FY2024	$120,000	"Methuen Arlington Neighborhood, Inc. to increase and enhance entrepreneurial opportunities, neighborhood investment, revitalization activities and..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Methuen received 39% of its proportional share of competitive grant awards.

Local road miles **180.7** 23rd of 351 · 3.4 per 1,000 residents (306th of 351)	Town-owned bridges, replacement cost **$3.7M** scored exposure $2.3M · one in poor condition	Road-stream crossings **167** 31st of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.2 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **53,693** residents plus seasonal	Core infrastructure index **0.35** roads, culverts, dams, coast, flood, energy

Burden index 0.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$12,344** FY2017–2025 · 287th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 35.1% of Methuen's general-fund spending in FY2025, down from 36.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.2%** $41.7M of $115M · median town 14.1%	FY2016 **35.1%** $51.7M of $147M · median town 12.2%	FY2025 **35.1%** $76.5M of $218M · median town 11.5%	Net of state charges, FY2025 **33.0%** FY2010: 37.3% · median town 10.0%

Methuen's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $6.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Methuen's state aid kept pace with both price measures: FY2025 aid was 18.4% above its FY2006 aid grown by Boston-area consumer prices and 5.2% above grown by the government price index.

Gross state aid went from $41.7 million in FY2006 to $76.5 million in FY2025, +83.6% in dollars. Flag: in FY2010, $4.9 million of Methuen's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+64.3%** $18.9M to $31.1M · all towns +54.0%	All fixed costs, FY2016–25 **+67.3%** $25.3M to $42.4M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Methuen's health insurance would have been $23.6 million in FY2025; it was $31.1 million, $7.46 million above the path. Its fixed costs would have been $31.7 million in FY2025; it was $42.4 million, $10.7 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Methuen came to $3 million, 24.8% of the $12.2 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3M	24.8%	28.2%
Placed in the town	$2.9M	23.6%	42.3%
Everything placed	$3.1M	25.4%	45.2%

SCHOOLS

Methuen's required school contribution is 2.6% of median household income, 199th highest of 351.

Chapter 70 aid, FY2026 **$78.4M** to the town's district	Required local contribution **$54.7M** FY2026
Share of household income **2.6%** 199th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+33%** after inflation

Methuen runs its own school district and also belongs to Greater Lawrence; Methuen accounts for 25% of that district's foundation budget.

EXPECTED AND ACTUAL

Methuen received $14.7 million in earmarks placed in the town and competitive grants over ten years, about the $14.6 million its size, need and institutions predict.

PEERS

Methuen ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Methuen this town	**56**	**$15,084**	**$205**	**$59.13**	**0.39**	**2.6%**
Dracut peer	46	$11,847	$125	$51.31	0.50	2.5%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Framingham peer	54	$14,513	$248	$157	0.72	3.1%
Middleborough peer · lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Middleborough

Town · Plymouth County · 24,505 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Bristol · Norman J. Orrall 52% of residents
2nd Plymouth · John R. Gaskey 32% of residents
12th Plymouth · Kathleen R. LaNatra 16% of residents

Middleborough is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS

Middleborough Public Schools, the town's own district
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Dighton, Freetown, Raynham, Rehoboth and Taunton

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Middleborough scores 45 on the Fairness Index for all state aid and 11 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

161st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	44	46	43

Rank under other weightings: 148th to 174th.

Weighting-dependent: the range crosses the 45–55 band

Middleborough received less than its share of state aid on all four measures; its blended score of 45 stays between 44 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

11 / 100

344th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
13	12	10	11

Rank under other weightings: 341st to 346th.

Stable low: below 45 under every weighting

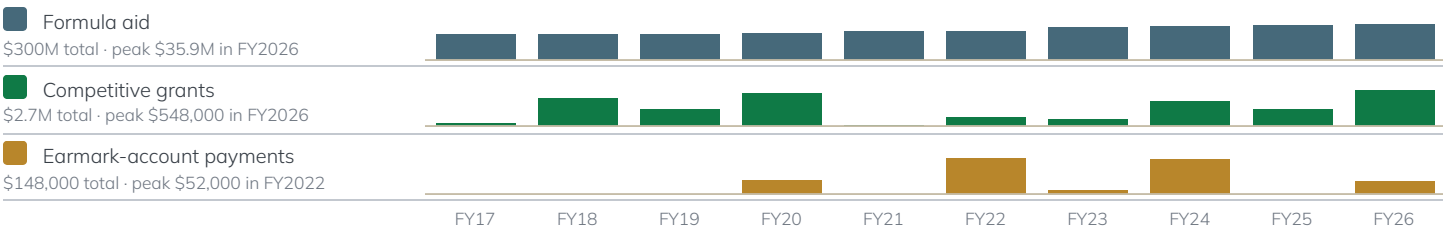
Middleborough received less than its share of discretionary money on all four measures; its blended score of 11 stays between 11 and 12 under every weighting tested.

STATE MONEY, FY2017–FY2026

Middleborough's town government and school districts received $300 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$300M	**$2.7M**	**$148,000**
$12,235 per resident (125th of 351) · gross	$110 per resident (319th of 351)	$6.02 per resident (280th of 351)

Competitive grants to Middleborough peaked in FY2026 at $548,000, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20.8 million, are not shown.

EARMARKS

Middleborough received $330,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$330,000	**$330,000**	**$330,000**	**Not a member**
$13.47 per resident (289th of 351)	$13.47 per resident (297th of 351)	$13.47 per resident (298th of 351)	35 municipalities had none

Placed in the town: 11 clauses in eight of ten budgets; the most recent in FY2025. Every one names Middleborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$62,000 (split two ways)	"equally to the school systems of the towns of Middleborough and Wareham to provide necessary technology for distance learning for underserved…"	Enacted names the town
FY2024	$50,000	"the Middleborough parks department for the reconstruction of the Pierce playground"	Enacted names the town
FY2023	$40,000	"enhance services at the Middleborough council on aging"	Enacted names the town
FY2025	$25,000	"the Middleborough mental health opioid task force to fund programming to assist those facing substance use disorders within the town"	Enacted names the town
FY2022	$25,000	"the town of Middleborough for the police department to implement measures intended to build positive relationships with the community, including the…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Middleborough received 78% of its proportional share of competitive grant awards.

Local road miles **161.3** 28th of 351 · 6.6 per 1,000 residents (173rd of 351)	Town-owned bridges, replacement cost **$17.6M** scored exposure $6.1M · 0.5 in poor condition	Road-stream crossings **224** 7th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **69.0 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **24,505** residents plus seasonal	Core infrastructure index **0.81** roads, culverts, dams, coast, flood, energy

Burden index 0.78; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,450 acres** 10.1% of land area · FY2026	State-owned land PILOT, FY2026 **$338,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$75.92** statewide $117 · FY2026	New growth per resident **$21,185** FY2017–2025 · 170th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 25.2% of Middleborough's general-fund spending in FY2025, down from 36.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.6%** $19.7M of $54M · median town 14.1%	FY2016 **31.2%** $22M of $70.6M · median town 12.2%	FY2025 **25.2%** $26.9M of $107M · median town 11.5%	Net of state charges, FY2025 **23.2%** FY2010: 32.4% · median town 10.0%

Middleborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Middleborough's state aid did not keep pace with either price measure: FY2025 aid was 12.3% below its FY2006 aid grown by Boston-area consumer prices and 22.0% below grown by the government price index.

Gross state aid went from $19.7 million in FY2006 to $26.9 million in FY2025, +36.1% in dollars. Flag: in FY2010, $1.5 million of Middleborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.9%** $8.7M to $11.7M · all towns +54.0%	All fixed costs, FY2016–25 **+51.2%** $15.3M to $23.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Middleborough's health insurance would have been $10.8 million in FY2025; it was $11.7 million, $869,000 above the path. Its fixed costs would have been $19.2 million in FY2025; it was $23.2 million, $4.04 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Middleborough came to $330,000, 10.9% of the $3.03 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$330,000	10.9%	28.2%
Placed in the town	$330,000	10.9%	42.3%
Everything placed	$330,000	10.9%	45.2%

SCHOOLS

Middleborough's required school contribution is 2.8% of median household income, 117th highest of 351.

Chapter 70 aid, FY2026 **$24.8M** to the town's district	Required local contribution **$27.1M** FY2026
Share of household income **2.8%** 117th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Middleborough runs its own school district and also belongs to Bristol Plymouth; Middleborough accounts for 13% of that district's foundation budget.

EXPECTED AND ACTUAL

Middleborough received $3.1 million in earmarks placed in the town and competitive grants over ten years, 25% of the $12.1 million its size, need and institutions predict.

PEERS

Middleborough ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Middleborough this town	**45**	**$12,235**	**$110**	**$13.47**	**0.78**	**2.8%**
Dracut peer	46	$11,847	$125	$51.31	0.50	2.5%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Middlefield

Town · Hampshire County · 352 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark	Gateway Regional School District, shared with Blandford, Chester, Huntington, Montgomery and Russell	Pioneer Valley Planning Commission

FAIRNESS INDEX

Middlefield scores 48 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

144th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	53	35	47

Rank under other weightings: 120th to 167th.

Weighting-dependent: the range crosses the 45–55 band

Middlefield received less than its share of state aid on two of four measures; its blended score of 48 stays between 44 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100

54th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
91	91	74	88

Rank under other weightings: 47th to 62nd.

Stable high: above 55 under every weighting

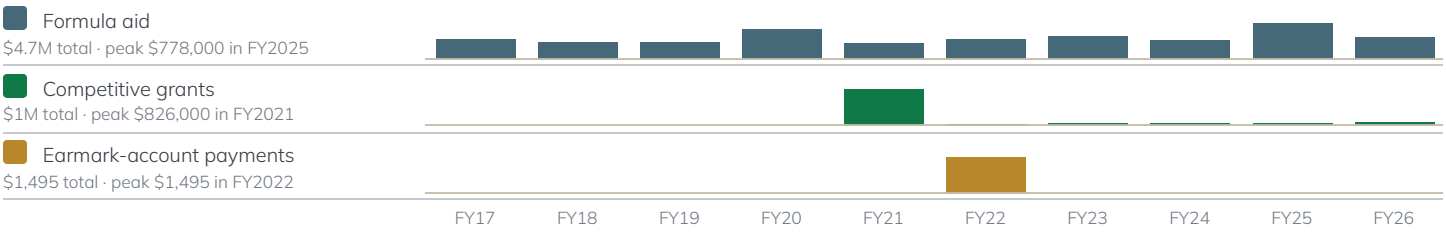
Middlefield received more than its share of discretionary money on all four measures; its blended score of 86 stays between 83 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Middlefield's town government and school districts received $4.7 million in formula aid and $1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$4.7M	$1M	$1,495
$13,430 per resident (105th of 351) · gross	$2,926 per resident (32nd of 351)	$4.25 per resident (297th of 351)

Competitive grants to Middlefield peaked in FY2021 at $826,000, 80% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 352 residents, a single payment moves Middlefield's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $512,000, are not shown.

EARMARKS

No local earmark was placed in Middlefield in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $1,495 in payments to Middlefield's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Middlefield.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Middlefield's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Hawley	$0	$0	$0	$0
Leyden	$100,000	$100,000	$100,000	$157
Florida	$0	$0	$0	$0
Goshen	$75,000	$75,000	$75,000	$81.97
New Ashford	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Middlefield received 24% of its proportional share of competitive grant awards.

Local road miles **38.3** 299th of 351 · 108.8 per 1,000 residents (3rd of 351)	Town-owned bridges, replacement cost **$10.7M** scored exposure $3.2M · one in poor condition	Road-stream crossings **34** 307th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **24.1 sq mi** 36% state-owned	Seasonal homes **14%** share of housing units	Peak service population **419** residents plus seasonal	Core infrastructure index **0.39** roads, culverts, dams, coast, flood, energy

Burden index 0.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,890 acres** 31.7% of land area · FY2026	State-owned land PILOT, FY2026 **$81,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$16.52** statewide $117 · FY2026	New growth per resident **$17,658** FY2017–2025 · 218th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.9% of Middlefield's general-fund spending in FY2025, up from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $82,000 of $975,000 · median town 14.1%	FY2016 **9.6%** $121,000 of $1.3M · median town 12.2%	FY2025 **9.9%** $166,000 of $1.7M · median town 11.5%	Net of state charges, FY2025 **8.3%** FY2010: 14.5% · median town 10.0%

Middlefield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $125,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Middlefield's state aid kept pace with both price measures: FY2025 aid was 30.4% above its FY2006 aid grown by Boston-area consumer prices and 15.9% above grown by the government price index.

Gross state aid went from $82,000 in FY2006 to $166,000 in FY2025, +102.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–8.6%** $32,000 to $29,000 · all towns +54.0%	All fixed costs, FY2016–25 **+53.9%** $106,000 to $163,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Middlefield's health insurance would have been $39,000 in FY2025; it was $29,000, $11,000 below the path. Its fixed costs would have been $132,000 in FY2025; it was $163,000, $31,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (–31%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Middlefield's reported health insurance fell from $32,000 in FY2016 to $29,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Middlefield's required school contribution is 1.9% of median household income, 319th highest of 351.

Chapter 70 aid, FY2026 **$90,000** attributed to the town	Required local contribution **$302,000** FY2026
Share of household income **1.9%** 319th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Middlefield has no school district of its own. Its pupils attend Middlefield and Gateway; Middlefield accounts for 100% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide. Middlefield had 23 resident pupils in FY2026, so per-pupil changes swing from year to year.

EXPECTED AND ACTUAL

Middlefield received $1 million in earmarks placed in the town and competitive grants over ten years, 49% of the $2.1 million its size, need and institutions predict.

PEERS

Middlefield is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Middlefield this town	**48**	**$13,430**	**$2,926**	**$0**	**0.24**	**1.9%**
Hawley peer · lowest in class of 30	59	$18,811	$11,175	$0	3.05	2.9%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%
New Ashford peer	53	$13,073	$2,924	$0	0.02	0.9%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Middleton

Town · Essex County · 9,816 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

20th Middlesex · Bradley H. Jones, Jr.
68% of residents

13th Essex · Sally P. Kerans 32% of residents

Middleton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Middleton Public Schools, the town's own district
Masconomet Regional School District, shared with Boxford and Topsfield
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Middleton scores 30 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

302nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	45	28	21

Rank under other weightings: 284th to 323rd.

Stable low: below 45 under every weighting

Middleton received less than its share of state aid on all four measures; its blended score of 30 stays between 27 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

293rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	38	22	16

Rank under other weightings: 280th to 304th.

Stable low: below 45 under every weighting

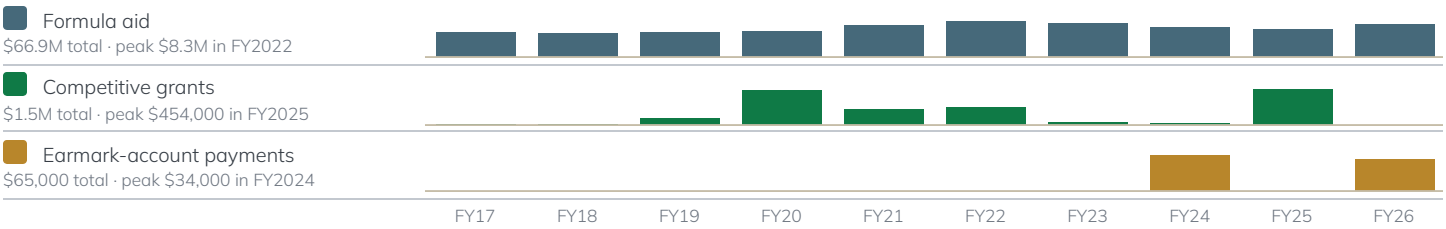
Middleton received less than its share of discretionary money on all four measures; its blended score of 25 stays between 21 and 28 under every weighting tested.

STATE MONEY, FY2017–FY2026

Middleton's town government and school districts received $66.9 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$66.9M	**$1.5M**	**$65,000**
$6,815 per resident (300th of 351) · gross	$154 per resident (288th of 351)	$6.66 per resident (276th of 351)

Competitive grants to Middleton peaked in FY2025 at $454,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.4 million, are not shown.

EARMARKS

Middleton received $323,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$323,000	**$323,000**	**$323,000**	**Not a member**
$32.88 per resident (215th of 351)	$32.88 per resident (226th of 351)	$32.88 per resident (228th of 351)	35 municipalities had none

Placed in the town: eight clauses in five of ten budgets; the most recent in FY2026. Every one names Middleton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"infrastructure design of the middle square in Middleton"	Enacted names the town
FY2024	$50,000	"the Middleton council on aging for the new community center in the town of Middleton"	Enacted names the town
FY2022	$50,000	"the town of Middleton for the relocation of a sidewalk along Route 114, also known as South Main street, in the town of Middleton"	Enacted names the town
FY2022	$50,000	"the construction of a fiber optic network in the town of Middleton to connect the fire, police and other municipal buildings and enable to the town..."	Enacted names the town
FY2022	$40,000	"costs associated with the public safety building in the town of Middleton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Middleton received 83% of its proportional share of competitive grant awards.

Local road miles **49.4** 256th of 351 · 5.0 per 1,000 residents (228th of 351)	Town-owned bridges, replacement cost **$7.4M** scored exposure $2.5M · none in poor condition	Road-stream crossings **57** 236th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.4 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **9,935** residents plus seasonal	Core infrastructure index **0.53** roads, culverts, dams, coast, flood, energy

Burden index 0.83; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **180 acres** 2.1% of land area · FY2026	State-owned land PILOT, FY2026 **$43,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$240** statewide $117 · FY2026	New growth per resident **$37,663** FY2017–2025 · 69th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.7% of Middleton's general-fund spending in FY2025, down from 10.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.0%** $2M of $19.7M · median town 14.1%	FY2016 **6.8%** $2.2M of $32M · median town 12.2%	FY2025 **5.7%** $2.7M of $46.8M · median town 11.5%	Net of state charges, FY2025 **5.0%** FY2010: 9.4% · median town 10.0%

Middleton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Middleton's state aid did not keep pace with either price measure: FY2025 aid was 12.9% below its FY2006 aid grown by Boston-area consumer prices and 22.5% below grown by the government price index.

Gross state aid went from $2 million in FY2006 to $2.7 million in FY2025, +35.2% in dollars. Flag: in FY2010, $364,000 of Middleton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.2%** $637,000 to $1M · all towns +54.0%	All fixed costs, FY2016–25 **+81.4%** $1.9M to $3.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Middleton's health insurance would have been $796,000 in FY2025; it was $1.00 million, $206,000 above the path. Its fixed costs would have been $2.41 million in FY2025; it was $3.51 million, $1.09 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Middleton came to $288,000, 79.0% of the $364,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$288,000	79.0%	28.2%
Placed in the town	$288,000	79.0%	42.3%
Everything placed	$288,000	79.0%	45.2%

SCHOOLS

Middleton's required school contribution is 2.6% of median household income, 187th highest of 351.

Chapter 70 aid, FY2026 **$3.9M** to the town's district	Required local contribution **$13.8M** FY2026
Share of household income **2.6%** 187th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Middleton runs its own district for some grades and belongs to Masconomet and Essex North Shore for others; Middleton accounts for 31% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Middleton received $1.8 million in earmarks placed in the town and competitive grants over ten years, 65% of the $2.8 million its size, need and institutions predict.

PEERS

Middleton ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Middleton this town	**30**	**$6,815**	**$154**	**$32.88**	**0.83**	**2.6%**
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Medfield peer	38	$8,137	$388	$46.47	2.14	2.3%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Milford

Town · Worcester County · 30,431 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
10th Worcester · Brian W. Murray

STATE SENATE
Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS
Milford Public Schools, the town's own district
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Millbury, Millville and four others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Milford scores 54 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

54 / 100

93rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
58	54	50	53

Rank under other weightings: 86th to 99th.

Near fair: between 45 and 55 under every weighting

Milford received more than its share of state aid on all four measures; its blended score of 54 stays between 53 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

314th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	18	21	18

Rank under other weightings: 307th to 319th.

Stable low: below 45 under every weighting

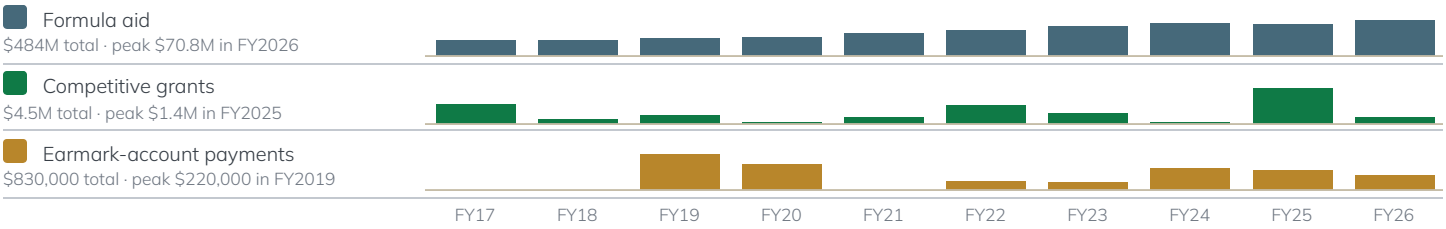
Milford received less than its share of discretionary money on all four measures; its blended score of 20 stays between 19 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Milford's town government and school districts received $484 million in formula aid and $4.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$484M	**$4.5M**	**$830,000**
$15,901 per resident (62nd of 351) · gross	$146 per resident (294th of 351)	$27.26 per resident (160th of 351)

Competitive grants to Milford peaked in FY2025 at $1.4 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $23.9 million, are not shown.

EARMARKS

Milford received $1.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$1.1M**	**$1.1M**	**Not a member**
$36.10 per resident (206th of 351)	$36.10 per resident (219th of 351)	$36.10 per resident (222nd of 351)	35 municipalities had none

Placed in the town: 23 clauses in ten of ten budgets; the most recent in FY2026. Every one names Milford directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$150,000	"economic development projects to revitalize the downtown area in the town of Milford"	Enacted names the town
FY2017	$84,000	"the Milford police department and the Juvenile Advocacy Group to maintain a regional substance abuse outreach and intervention program in the greater…"	Enacted names the town
FY2020	$70,000	"downtown revitalization and economic development projects in the town of Milford"	Enacted names the town
FY2026	$50,000	"upgrades to a pedestrian crossing at the Milford youth center and other renovations or improvements"	Enacted names the town
FY2026	$50,000	"Sweet Inspirations LLC in Milford for equipment, materials and services"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Milford received 26% of its proportional share of competitive grant awards.

Local road miles **108.7** 75th of 351 · 3.6 per 1,000 residents (296th of 351)	Town-owned bridges, replacement cost **$13.3M** scored exposure $4.3M · four in poor condition	Road-stream crossings **146** 48th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **14.8 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **30,549** residents plus seasonal	Core infrastructure index **1.12** roads, culverts, dams, coast, flood, energy

Burden index 0.26; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$16,451** FY2017–2025 · 233rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

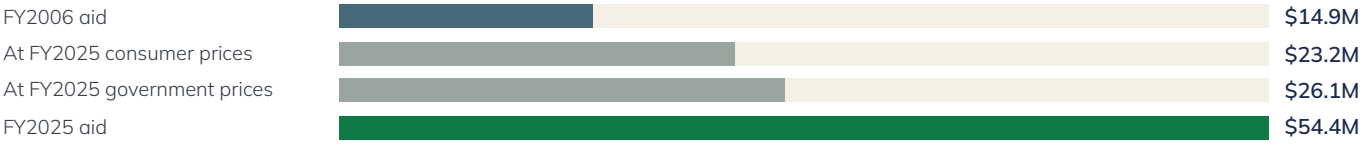
State aid covered 36.6% of Milford's general-fund spending in FY2025, up from 21.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.5%** $14.9M of $69.6M · median town 14.1%	FY2016 **28.2%** $24.4M of $86.6M · median town 12.2%	FY2025 **36.6%** $54.4M of $149M · median town 11.5%	Net of state charges, FY2025 **33.3%** FY2010: 23.6% · median town 10.0%

Milford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Milford's state aid kept pace with both price measures: FY2025 aid was 134.9% above its FY2006 aid grown by Boston-area consumer prices and 108.8% above grown by the government price index.



Gross state aid went from $14.9 million in FY2006 to $54.4 million in FY2025, +264.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+64.0%** $14.3M to $23.5M · all towns +54.0%	All fixed costs, FY2016–25 **+71.5%** $14.6M to $25M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Milford's health insurance would have been $17.9 million in FY2025; it was $23.5 million, $5.60 million above the path. Its fixed costs would have been $18.2 million in FY2025; it was $25 million, $6.79 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Milford came to $974,000, 10.6% of the $9.16 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$974,000	10.6%	28.2%
Placed in the town	$974,000	10.6%	42.3%
Everything placed	$974,000	10.6%	45.2%

SCHOOLS

Milford's required school contribution is 3.1% of median household income, 53rd highest of 351.

Chapter 70 aid, FY2026 **$57.1M** to the town's district	Required local contribution **$33.3M** FY2026
Share of household income **3.1%** 53rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+57%** after inflation

Milford runs its own school district and also belongs to Blackstone Valley; Milford accounts for 16% of that district's foundation budget.

EXPECTED AND ACTUAL

Milford received $5.7 million in earmarks placed in the town and competitive grants over ten years, 41% of the $13.8 million its size, need and institutions predict.

PEERS

Milford ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Milford this town	**54**	**$15,901**	**$146**	**$36.10**	**0.26**	**3.1%**
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Ludlow peer	42	$10,596	$407	$132	1.85	2.8%
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
South Hadley peer	39	$9,190	$458	$31.82	1.61	2.5%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Millbury

Town · Worcester County · 13,961 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
7th Worcester · Paul K. Frost

STATE SENATE
Second Worcester · Michael O. Moore

SCHOOL DISTRICTS
Millbury Public Schools, the town's own district
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millville and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Millbury scores 44 on the Fairness Index for all state aid and 71 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

173rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	45	44	45

Rank under other weightings: 164th to 190th.

Stable low: below 45 under every weighting

Millbury received less than its share of state aid on all four measures; its blended score of 44 stays between 43 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

71 / 100

104th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
68	72	71	71

Rank under other weightings: 99th to 112th.

Stable high: above 55 under every weighting

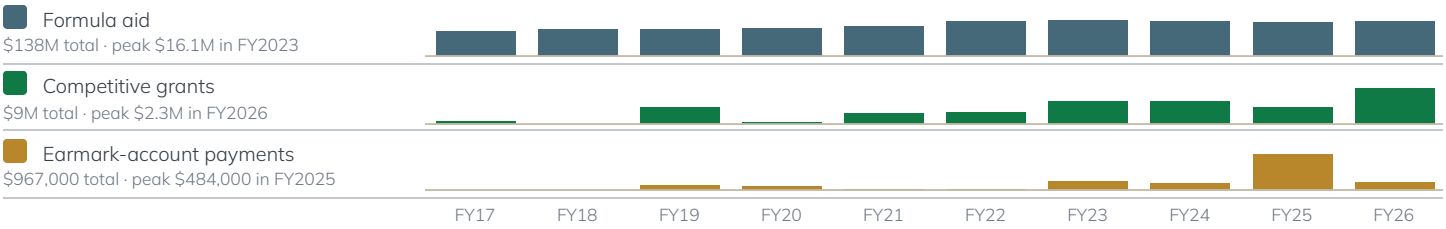
Millbury received more than its share of discretionary money on all four measures; its blended score of 71 stays between 70 and 71 under every weighting tested.

STATE MONEY, FY2017–FY2026

Millbury's town government and school districts received $138 million in formula aid and $9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$138M	$9M	$967,000
$9,909 per resident (182nd of 351) · gross	$648 per resident (118th of 351)	$69.23 per resident (39th of 351)

Competitive grants to Millbury peaked in FY2026 at $2.3 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.7 million, are not shown.

EARMARKS

Millbury received $744,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$744,000	$744,000	$744,000	Not a member
$53.29 per resident (138th of 351)	$53.29 per resident (161st of 351)	$53.29 per resident (165th of 351)	35 municipalities had none

Placed in the town: 23 clauses in ten of ten budgets; the most recent in FY2026. Every one names Millbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$120,000	"improvements in the town of Millbury"	Enacted names the town
FY2023	$65,000	"the Millbury public schools for the purchase of a multi-purpose activity bus"	Enacted names the town
FY2019	$65,000	"the town of Millbury for public safety improvements"	Enacted names the town
FY2026	$57,000	"the town of Millbury for repairs and improvements to the Millbury senior center"	Enacted names the town
FY2018	$54,000	"public safety improvements for the Millbury public school district"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Millbury received 1.09 times its proportional share of competitive grant awards.

Local road miles **71.3** 185th of 351 · 5.1 per 1,000 residents (225th of 351)	Town-owned bridges, replacement cost **$24.4M** scored exposure $6.4M · five in poor condition	Road-stream crossings **125** 71st of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **15.7 sq mi** 2% state-owned	Seasonal homes **2%** share of housing units	Peak service population **14,188** residents plus seasonal	Core infrastructure index **2.00** roads, culverts, dams, coast, flood, energy

Burden index 1.09; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **240 acres** 2.4% of land area · FY2026	State-owned land PILOT, FY2026 **$24,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$102** statewide $117 · FY2026	New growth per resident **$27,269** FY2017–2025 · 122nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 21.0% of Millbury's general-fund spending in FY2025, down from 27.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.5%** $7.9M of $28.7M · median town 14.1%	FY2016 **23.4%** $8.8M of $37.4M · median town 12.2%	FY2025 **21.0%** $11.8M of $56M · median town 11.5%	Net of state charges, FY2025 **19.6%** FY2010: 24.7% · median town 10.0%

Millbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $699,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Millbury's state aid did not keep pace with either price measure: FY2025 aid was 4.1% below its FY2006 aid grown by Boston-area consumer prices and 14.7% below grown by the government price index.

Gross state aid went from $7.9 million in FY2006 to $11.8 million in FY2025, +48.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.8%** $4.4M to $6M · all towns +54.0%	All fixed costs, FY2016–25 **+56.6%** $6.4M to $10M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Millbury's health insurance would have been $5.53 million in FY2025; it was $5.97 million, $438,000 above the path. Its fixed costs would have been $8.01 million in FY2025; it was $10 million, $2.03 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Millbury came to $637,000, 41.3% of the $1.54 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$637,000	41.3%	28.2%
Placed in the town	$637,000	41.3%	42.3%
Everything placed	$637,000	41.3%	45.2%

SCHOOLS

Millbury's required school contribution is 2.5% of median household income, 232nd highest of 351.

Chapter 70 aid, FY2026 **$9.9M** to the town's district	Required local contribution **$16.4M** FY2026
Share of household income **2.5%** 232nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

Millbury runs its own school district and also belongs to Blackstone Valley; Millbury accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Millbury received $9.8 million in earmarks placed in the town and competitive grants over ten years, 2.4 times the $4 million its size, need and institutions predict.

PEERS

Millbury ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Millbury this town	**44**	**$9,909**	**$648**	**$53.29**	**1.09**	**2.5%**
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Lunenburg peer	40	$10,667	$157	$54.36	0.42	2.7%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Millis

Town · Norfolk County · 8,888 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Middlesex · James C. Arena-DeRosa
67% of residents
9th Norfolk · Marcus S. Vaughn 33% of residents
Millis is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Millis Public Schools, the town's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Norfolk, North Attleborough, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Millis scores 39 on the Fairness Index for all state aid and 39 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100
231st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	49	38	30

Rank under other weightings: 215th to 239th.

Stable low: below 45 under every weighting

Millis received less than its share of state aid on all four measures; its blended score of 39 stays between 36 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

39 / 100
228th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	49	40	30

Rank under other weightings: 216th to 238th.

Stable low: below 45 under every weighting

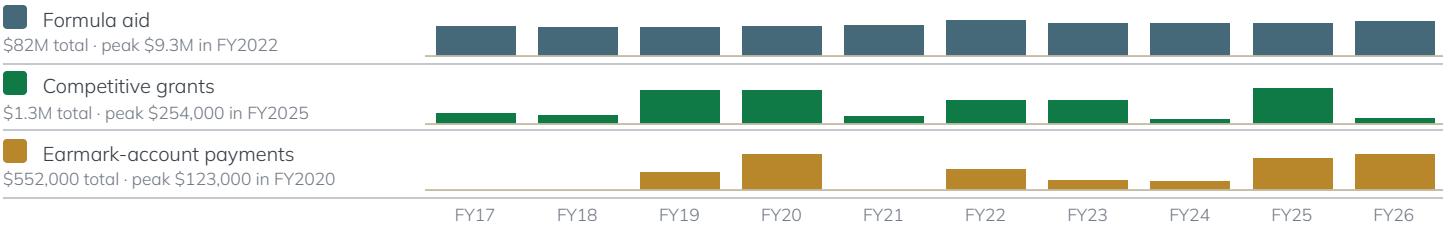
Millis received less than its share of discretionary money on all four measures; its blended score of 39 stays between 35 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Millis's town government and school districts received $82 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$82M	**$1.3M**	**$552,000**
$9,221 per resident (208th of 351) · gross	$150 per resident (289th of 351)	$62.05 per resident (51st of 351)

Competitive grants to Millis were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.1 million, are not shown.

EARMARKS

Millis received $1.3 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	**$1.3M**	**$1.3M**	**Not a member**
$151 per resident (15th of 351)	$151 per resident (24th of 351)	$151 per resident (30th of 351)	35 municipalities had none

Placed in the town: 27 clauses in ten of ten budgets; the most recent in FY2026. Every one names Millis directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$150,000	"mitigation costs in the Millis public school district"	Enacted names the town
FY2017	$150,000	"mitigation costs in the Millis public school district"	Enacted names the town
FY2020	$100,000	"the town of Millis to conduct a study of the town's building and facilities"	Enacted names the town
FY2020	$100,000	"the town of Millis for the repair and reconstruction of the Dover Road West Street Bridge"	Enacted names the town
FY2018	$100,000	"the town of Millis for improvements to the wiring and communications abilities of the police and fire departments of the town"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Millis received 75% of its proportional share of competitive grant awards.

Local road miles **50.8** 248th of 351 · 5.7 per 1,000 residents (205th of 351)	Town-owned bridges, replacement cost **$10.9M** scored exposure $1.7M · none in poor condition	Road-stream crossings **55** 244th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.0 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,915** residents plus seasonal	Core infrastructure index **1.16** roads, culverts, dams, coast, flood, energy

Burden index 0.75; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$52,335** FY2017–2025 · 33rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.1% of Millis's general-fund spending in FY2025, down from 20.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.9%** $3.9M of $18.9M · median town 14.1%	FY2016 **22.9%** $6.1M of $26.7M · median town 12.2%	FY2025 **15.1%** $6.9M of $45.6M · median town 11.5%	Net of state charges, FY2025 **14.2%** FY2010: 23.3% · median town 10.0%

Millis's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $186,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Millis's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 12.4% above its FY2006 aid grown by Boston-area consumer prices and 0.1% below grown by the government price index.

Gross state aid went from $3.9 million in FY2006 to $6.9 million in FY2025, +74.3% in dollars. Flag: in FY2010, $752,000 of Millis's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+65.8%** $2.4M to $4M · all towns +54.0%	All fixed costs, FY2016–25 **+73.8%** $4.2M to $7.3M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Millis's health insurance would have been $2.98 million in FY2025; it was $3.95 million, $976,000 above the path. Its fixed costs would have been $5.22 million in FY2025; it was $7.27 million, $2.05 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Millis came to $1.2 million, 78.7% of the $1.57 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.2M	78.7%	28.2%
Placed in the town	$1.2M	78.7%	42.3%
Everything placed	$1.2M	78.7%	45.2%

SCHOOLS

Millis's required school contribution is 2.6% of median household income, 202nd highest of 351.

Chapter 70 aid, FY2026 **$5.5M** to the town's district	Required local contribution **$13.2M** FY2026
Share of household income **2.6%** 202nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Millis runs its own school district and also belongs to Tri County and Norfolk County; Millis accounts for 5% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Millis received $3.3 million in earmarks placed in the town and competitive grants over ten years, about the $3.4 million its size, need and institutions predict.

PEERS

Millis ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Millis this town	**39**	**$9,221**	**$150**	**$151**	**0.75**	**2.6%**
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Sutton peer	44	$10,223	$840	$107	1.91	3.1%
Dighton peer	56	$15,030	$168	$76.89	0.53	2.4%
Hanson peer	51	$12,622	$231	$52.67	0.66	2.6%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Millville

Town · Worcester County · 3,160 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
8th Worcester · Michael J. Soter

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Blackstone-Millville Regional School District, shared with Blackstone
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Millville scores 56 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

65th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	58	54	59

Rank under other weightings: 63rd to 79th.

Stable high: above 55 under every weighting

Millville received more than its share of state aid on all four measures; its blended score of 56 stays between 55 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

112th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	68	74	69

Rank under other weightings: 100th to 121st.

Stable high: above 55 under every weighting

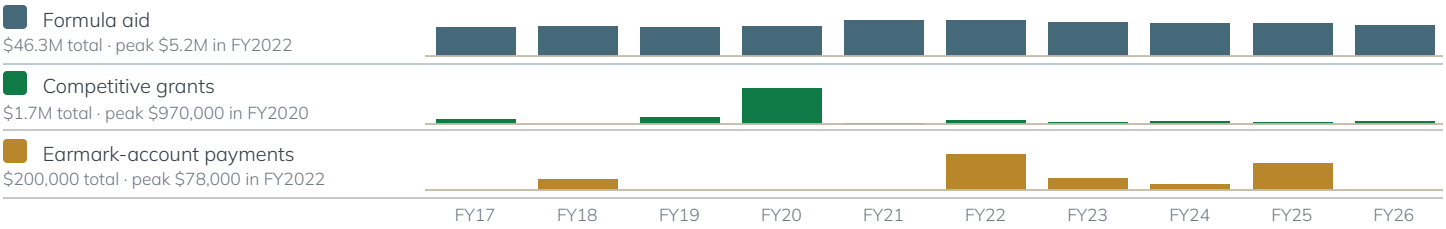
Millville received more than its share of discretionary money on all four measures; its blended score of 69 stays between 68 and 70 under every weighting tested.

STATE MONEY, FY2017–FY2026

Millville's town government and school districts received $46.3 million in formula aid and $1.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$46.3M	$1.7M	$200,000
$14,661 per resident (78th of 351) · gross	$545 per resident (132nd of 351)	$63.21 per resident (48th of 351)

Competitive grants to Millville peaked in FY2020 at $970,000, 56% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.2 million, are not shown.

EARMARKS

Millville received $360,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$360,000	$360,000	$360,000	Not a member
$114 per resident (32nd of 351)	$114 per resident (53rd of 351)	$114 per resident (59th of 351)	35 municipalities had none

Placed in the town: six clauses in six of ten budgets; the most recent in FY2026. Every one names Millville directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$250,000	"the town of Millville for the purchase of a new ambulance"	Enacted names the town
FY2020	$30,000	"the town of Millville to conduct an internal audit of town finances"	Enacted names the town
FY2023	$25,000	"the town of Millville for the outfit of a rural police command center response vehicle"	Enacted names the town
FY2018	$25,000	"the emergency relocation of the Millville town hall"	Enacted names the town
FY2026	$15,000	"upgrades and improvements to public works equipment such as purchasing and repairing equipment including, but not limited to, a front-end loader or…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Millville received 1.93 times its proportional share of competitive grant awards.

Local road miles **22.4** 335th of 351 · 7.1 per 1,000 residents (157th of 351)	Town-owned bridges, replacement cost **$12.5M** scored exposure $1.2M · none in poor condition	Road-stream crossings **36** 304th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.9 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **3,197** residents plus seasonal	Core infrastructure index **1.52** roads, culverts, dams, coast, flood, energy

Burden index 1.93; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **58 acres** 1.9% of land area · FY2026	State-owned land PILOT, FY2026 **$4,553** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$78.07** statewide $117 · FY2026	New growth per resident **$7,138** FY2017–2025 · 345th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.7% of Millville's general-fund spending in FY2025, down from 8.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.2%** $376,000 of $4.6M · median town 14.1%	FY2016 **8.3%** $463,000 of $5.6M · median town 12.2%	FY2025 **7.7%** $600,000 of $7.8M · median town 11.5%	Net of state charges, FY2025 **7.4%** FY2010: 8.5% · median town 10.0%

Millville's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Millville's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 2.9% above its FY2006 aid grown by Boston-area consumer prices and 8.6% below grown by the government price index.

Gross state aid went from $376,000 in FY2006 to $600,000 in FY2025, +59.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+68.9%** $90,000 to $153,000 · all towns +54.0%	All fixed costs, FY2016–25 **+37.4%** $297,000 to $408,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Millville's health insurance would have been $113,000 in FY2025; it was $153,000, $40,000 above the path. Its fixed costs would have been $371,000 in FY2025; it was $408,000, $37,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Millville came to $345,000, 5.5 times the $62,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$345,000	5.5 times	28.2%
Placed in the town	$345,000	5.5 times	42.3%
Everything placed	$345,000	5.5 times	45.2%

SCHOOLS

Millville's required school contribution is 2.0% of median household income, 305th highest of 351.

Chapter 70 aid, FY2026 **$3.4M** attributed to the town	Required local contribution **$3.1M** FY2026
Share of household income **2.0%** 305th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Millville has no school district of its own. Its pupils attend Millville, Blackstone-Millville and Blackstone Valley; Millville accounts for 100%, 25% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Millville received $2.1 million in earmarks placed in the town and competitive grants over ten years, 15% more than the $1.8 million its size, need and institutions predict.

PEERS

Millville ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Millville this town	**56**	**$14,661**	**$545**	**$114**	**1.93**	**2.0%**
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Shutesbury peer · lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Williamsburg peer	41	$9,541	$578	$3.71	1.40	2.2%
Hubbardston peer	59	$16,583	$264	$66.58	0.33	2.3%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Milton

Town · Norfolk County · 28,587 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Norfolk · Richard G. Wells, Jr. 76% of residents
12th Suffolk · Brandy Fluker-Reid
24% of residents

Milton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr.

SCHOOL DISTRICTS

Milton Public Schools, the town's own district
Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Dedham, Holbrook, Norwood, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Milton scores 31 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

294th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	46	25	25

Rank under other weightings: 277th to 312th.

Stable low: below 45 under every weighting

Milton received less than its share of state aid on all four measures; its blended score of 31 stays between 28 and 35 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

237th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	48	41	27

Rank under other weightings: 219th to 255th.

Stable low: below 45 under every weighting

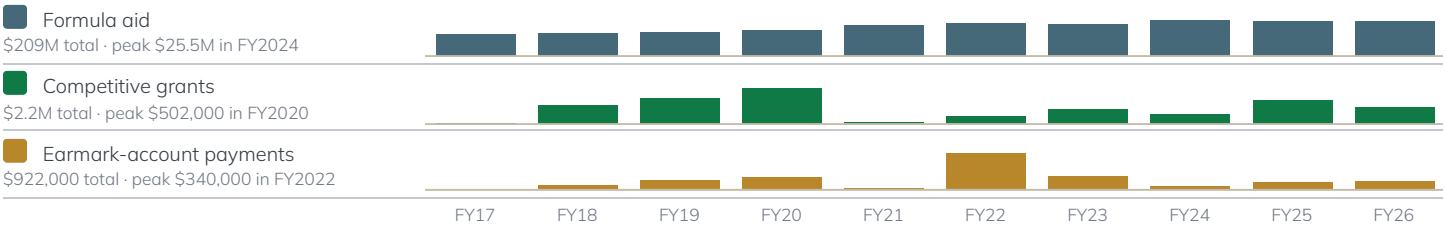
Milton received less than its share of discretionary money on all four measures; its blended score of 37 stays between 32 and 41 under every weighting tested.

STATE MONEY, FY2017–FY2026

Milton's town government and school districts received $209 million in formula aid and $2.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$209M	$2.2M	$922,000
$7,307 per resident (277th of 351) · gross	$76.91 per resident (338th of 351)	$32.26 per resident (140th of 351)

Competitive grants to Milton peaked in FY2020 at $502,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.1 million, are not shown.

EARMARKS

Milton received $5.2 million in local earmarks naming the town, $7.7 million placed in the town and $7.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$5.2M	$7.7M	$7.7M	Not a member
$180 per resident (11th of 351)	$270 per resident (6th of 351)	$270 per resident (10th of 351)	35 municipalities had none

Placed in the town: 59 clauses in ten of ten budgets; the most recent in FY2026. $5.2 million came in clauses that name Milton; the other $2.6 million went to organizations based in Milton, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$1M	"the Blue Hills Trailside Museum in the town of Milton"	Enacted names the town
FY2023	$1M	"the Blue Hills Trailside Museum in the town of Milton"	Enacted names the town
FY2025	$500,000	"the Blue Hills Trailside Museum in the town of Milton"	Enacted names the town
FY2020	$500,000	"improvements to the Max Ulin skating rink in the town of Milton, $125,000 of which shall be spent on the construction of a dedicated women's locker..."	Enacted names the town
FY2020	$500,000	"the Blue Hills trailside museum"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Milton received 50% of its proportional share of competitive grant awards.

Local road miles **97.6** 101st of 351 · 3.4 per 1,000 residents (303rd of 351)	Town-owned bridges, replacement cost **$10.1M** scored exposure $4.5M · one in poor condition	Road-stream crossings **80** 166th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **13.0 sq mi** 24% state-owned	Seasonal homes **1%** share of housing units	Peak service population **28,736** residents plus seasonal	Core infrastructure index **1.15** roads, culverts, dams, coast, flood, energy

Burden index 0.50; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,662 acres** 20.0% of land area · FY2026	State-owned land PILOT, FY2026 **$1.6M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$950** statewide $117 · FY2026	New growth per resident **$21,823** FY2017–2025 · 163rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.3% of Milton's general-fund spending in FY2025, up from 11.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.5%** $7.5M of $64.8M · median town 14.1%	FY2016 **10.6%** $9.9M of $93.5M · median town 12.2%	FY2025 **13.3%** $17.9M of $135M · median town 11.5%	Net of state charges, FY2025 **9.8%** FY2010: 6.2% · median town 10.0%

Milton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $191,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Milton's state aid kept pace with both price measures: FY2025 aid was 54.8% above its FY2006 aid grown by Boston-area consumer prices and 37.6% above grown by the government price index.

Gross state aid went from $7.5 million in FY2006 to $17.9 million in FY2025, +140.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+61.5%** $13.4M to $21.6M · all towns +54.0%	All fixed costs, FY2016–25 **+17.6%** $20.2M to $23.7M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Milton's health insurance would have been $16.7 million in FY2025; it was $21.6 million, $4.89 million above the path. Its fixed costs would have been $25.2 million in FY2025; it was $23.7 million, $1.48 million below the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (+41%) and FY2025 (+35%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Milton came to $4.8 million, 58.6% of the $8.22 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.8M	58.6%	28.2%
Placed in the town	$7.2M	88.1%	42.3%
Everything placed	$7.2M	88.1%	45.2%

SCHOOLS

Milton's required school contribution is 2.8% of median household income, 132nd highest of 351.

Chapter 70 aid, FY2026 **$13M** to the town's district	Required local contribution **$47.7M** FY2026
Share of household income **2.8%** 132nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+33%** after inflation

Milton runs its own school district and also belongs to Blue Hills and Norfolk County; Milton accounts for 4% and 3% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Milton received $10.1 million in earmarks placed in the town and competitive grants over ten years, 8% more than the $9.4 million its size, need and institutions predict.

PEERS

Milton ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Milton this town	**31**	**$7,307**	**$76.91**	**$270**	**0.50**	**2.8%**
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Walpole peer	30	$6,864	$139	$32.09	0.61	2.6%
Burlington peer	35	$7,194	$367	$102	0.46	3.0%
Needham best in class of 30	28	$6,664	$33.58	$150	0.21	2.5%
Scituate lowest in class of 30	34	$7,209	$711	$18.25	3.23	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Monroe

Town · Franklin County · 122 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Florida, Lanesborough, North Adams, Savoy and Williamstown

Monroe operates no schools of its own and belongs to no regional academic district in DESE's FY2026 files.

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Monroe scores 63 on the Fairness Index for all state aid and 98 for discretionary money. Fifty is a fair share.

ALL STATE AID

63 / 100

30th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
67	66	45	73

Rank under other weightings: 20th to 53rd.

Stable high: above 55 under every weighting

Monroe received more than its share of state aid on three of four measures; its blended score of 63 stays between 59 and 67 under every weighting tested.

DISCRETIONARY MONEY ONLY

98 / 100

5th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	95	99

Rank under other weightings: 4th to 7th.

Stable high: above 55 under every weighting

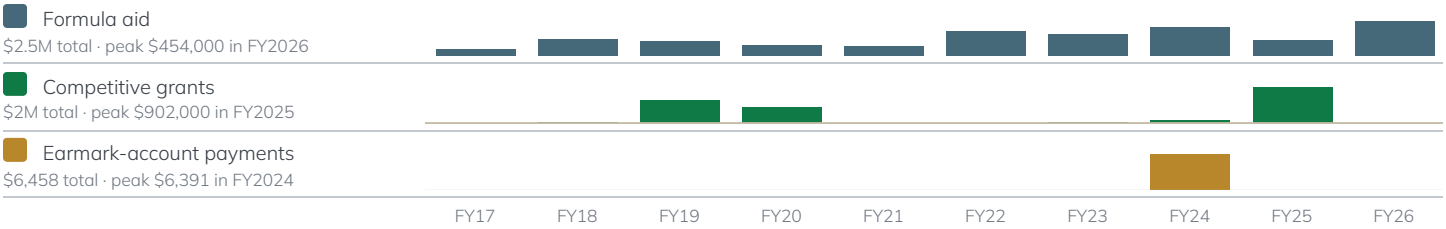
Monroe received more than its share of discretionary money on all four measures; its blended score of 98 stays between 97 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Monroe's town government and school districts received $2.5 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.5M	$2M	$6,458
$20,140 per resident (26th of 351) · gross	$16,477 per resident (2nd of 351)	$52.93 per resident (74th of 351)

Competitive grants to Monroe peaked in FY2025 at $902,000, 45% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 122 residents, a single payment moves Monroe's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.7 million, are not shown.

EARMARKS

Monroe received $12,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$12,000	$12,000	$12,000	Not a member
$98.36 per resident (54th of 351)	$98.36 per resident (71st of 351)	$98.36 per resident (81st of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2024. Every one names Monroe directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$12,000	"public safety communication services in the town of Monroe"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Monroe received 4.23 times its proportional share of competitive grant awards.

Local road miles **16.4** 344th of 351 · 134.3 per 1,000 residents (2nd of 351)	Town-owned bridges, replacement cost **$4.3M** scored exposure $844,000 · none in poor condition	Road-stream crossings **15** 332nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **10.7 sq mi** 38% state-owned	Seasonal homes **22%** share of housing units	Peak service population **160** residents plus seasonal	Core infrastructure index **12.53** roads, culverts, dams, coast, flood, energy

Burden index 4.23; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,620 acres** 38.3% of land area · FY2026	State-owned land PILOT, FY2026 **$14,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$5.17** statewide $117 · FY2026	New growth per resident **$10,010** FY2017–2025 · 323rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.7% of Monroe's general-fund spending in FY2025, down from 24.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.0%** $112,000 of $464,000 · median town 14.1%	FY2016 **11.3%** $76,000 of $677,000 · median town 12.2%	FY2025 **15.7%** $181,000 of $1.2M · median town 11.5%	Net of state charges, FY2025 **12.1%** FY2010: 12.2% · median town 10.0%

Monroe's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $24,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Monroe's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 4.9% above its FY2006 aid grown by Boston-area consumer prices and 6.8% below grown by the government price index.

Gross state aid went from $112,000 in FY2006 to $181,000 in FY2025, +62.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+29.7%** $40,000 to $53,000 · all towns +54.0%	All fixed costs, FY2016–25 **+28.5%** $97,000 to $124,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Monroe's health insurance would have been $51,000 in FY2025; it was $53,000, $1,958 above the path. Its fixed costs would have been $121,000 in FY2025; it was $124,000, $3,441 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (+117%) and FY2020 (–47%); health insurance changed by more than 30% in one year in FY2021 (+98%), FY2022 (–51%) and FY2025 (+40%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Monroe came to $12,000, 99.7% of the $12,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$12,000	99.7%	28.2%
Placed in the town	$12,000	99.7%	42.3%
Everything placed	$12,000	99.7%	45.2%

SCHOOLS

Monroe's required school contribution is $121,000 in FY2026; the Census reports no median household

EXPECTED AND ACTUAL

Monroe received $2 million in earmarks placed in the town and competitive grants over ten years, about

income for Monroe, so its share of income is not available.

Chapter 70 aid, FY2026 **$184,000** attributed to the town	Required local contribution **$121,000** FY2026
Share of household income not available no Census median income	Real aid per pupil, FY2017–26 **+18%** after inflation

Monroe has no school district of its own. Its pupils attend Monroe and Northern Berkshire; Monroe accounts for 100% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide. Monroe had 23 resident pupils in FY2026, so per-pupil changes swing from year to year.

the $2.1 million its size, need and institutions predict.

PEERS

Monroe ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Monroe this town	**63**	**$20,140**	**$16,477**	**$98.36**	**4.23**	**not available**
Hawley peer · lowest in class of 30	59	$18,811	$11,175	$0	3.05	2.9%
Middlefield peer	48	$13,430	$2,926	$0	0.24	1.9%
New Ashford peer	53	$13,073	$2,924	$0	0.02	0.9%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Monson

Town · Hampden County · 8,136 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Hampden · Brian M. Ashe 68% of residents
12th Hampden · Angelo J. Puppolo, Jr. 32% of residents

Monson is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Monson Public Schools, the town's own district
Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, New Braintree, Oakham, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Monson scores 55 on the Fairness Index for all state aid and 41 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

81st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	51	60	54

Rank under other weightings: 60th to 99th.

Weighting-dependent: the range crosses the 45–55 band

Monson received more than its share of state aid on all four measures; its blended score of 55 stays between 53 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

41 / 100

219th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	37	43	40

Rank under other weightings: 207th to 230th.

Stable low: below 45 under every weighting

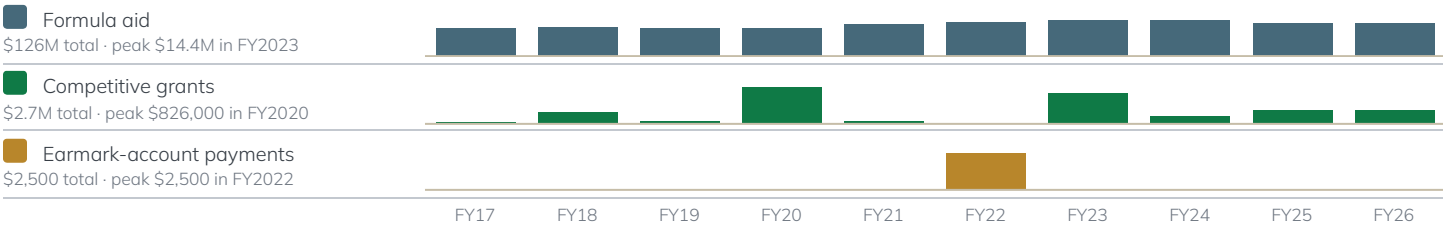
Monson received less than its share of discretionary money on all four measures; its blended score of 41 stays between 39 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Monson's town government and school districts received $126 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$126M	**$2.7M**	**$2,500**
$15,493 per resident (68th of 351) · gross	$338 per resident (191st of 351)	$0.31 per resident (334th of 351)

Competitive grants to Monson peaked in FY2020 at $826,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.4 million, are not shown.

EARMARKS

Monson received $121,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$121,000	**$121,000**	**$121,000**	**Not a member**
$14.84 per resident (284th of 351)	$14.84 per resident (292nd of 351)	$14.84 per resident (293rd of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Monson directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$61,000	"the town of Monson for soil testing on town lot 293 for future town use"	Enacted names the town
FY2025	$60,000	"the Monson Senior Center for an ADA compliant van to transport seniors to medical appointments, adult day care facilities and events as well as a..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Monson received 2.33 times its proportional share of competitive grant awards.

Local road miles **100.4** 94th of 351 · 12.3 per 1,000 residents (84th of 351)	Town-owned bridges, replacement cost **$28.2M** scored exposure $13.8M · 4.5 in poor condition	Road-stream crossings **147** 46th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **44.2 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,136** residents plus seasonal	Core infrastructure index **1.90** roads, culverts, dams, coast, flood, energy

Burden index 2.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,028 acres** 3.6% of land area · FY2026	State-owned land PILOT, FY2026 **$141,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$137** statewide $117 · FY2026	New growth per resident **$12,826** FY2017–2025 · 281st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 34.2% of Monson's general-fund spending in FY2025, down from 49.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **49.6%** $10.9M of $22M · median town 14.1%	FY2016 **41.0%** $9.7M of $23.6M · median town 12.2%	FY2025 **34.2%** $10.2M of $29.7M · median town 11.5%	Net of state charges, FY2025 **30.8%** FY2010: 45.4% · median town 10.0%

Monson's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $897,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Monson's state aid did not keep pace with either price measure: FY2025 aid was 39.8% below its FY2006 aid grown by Boston-area consumer prices and 46.5% below grown by the government price index.

Gross state aid went from $10.9 million in FY2006 to $10.2 million in FY2025, –6.6% in dollars. Flag: in FY2010, $2.6 million of Monson's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+38.6%** $2M to $2.8M · all towns +54.0%	All fixed costs, FY2016–25 **+56.6%** $3.9M to $6.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Monson's health insurance would have been $2.55 million in FY2025; it was $2.83 million, $279,000 above the path. Its fixed costs would have been $4.83 million in FY2025; it was $6.06 million, $1.23 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Monson came to $121,000, 15.3% of the $788,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$121,000	15.3%	28.2%
Placed in the town	$121,000	15.3%	42.3%
Everything placed	$121,000	15.3%	45.2%

SCHOOLS

Monson's required school contribution is 2.6% of

EXPECTED AND ACTUAL

Monson received $2.9 million in earmarks placed in the town and competitive grants over ten years, 77% of the $3.7 million its size, need and institutions predict.

median household income, 196th highest of 351.

Chapter 70 aid, FY2026 **$8.8M** to the town's district	Required local contribution **$8.1M** FY2026
Share of household income **2.6%** 196th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+5%** after inflation

Monson runs its own school district and also belongs to Pathfinder; Monson accounts for 15% of that district's foundation budget.

PEERS

Monson ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Monson this town	**55**	**$15,493**	**$338**	**$14.84**	**2.33**	**2.6%**
Barre peer	63	$20,237	$183	$22.43	0.33	2.1%
Dudley peer	60	$17,447	$442	$36.88	1.55	2.5%
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Dalton peer	58	$17,590	$490	$27.97	1.32	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Montague

Town · Franklin County · 8,482 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Gill-Montague Regional School District, shared with Gill
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Montague scores 55 on the Fairness Index for all state aid and 84 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

89th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	46	60	56

Rank under other weightings: 62nd to 111th.

Weighting-dependent: the range crosses the 45–55 band

Montague received more than its share of state aid on three of four measures; its blended score of 55 stays between 52 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

84 / 100

61st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
85	79	85	84

Rank under other weightings: 54th to 65th.

Stable high: above 55 under every weighting

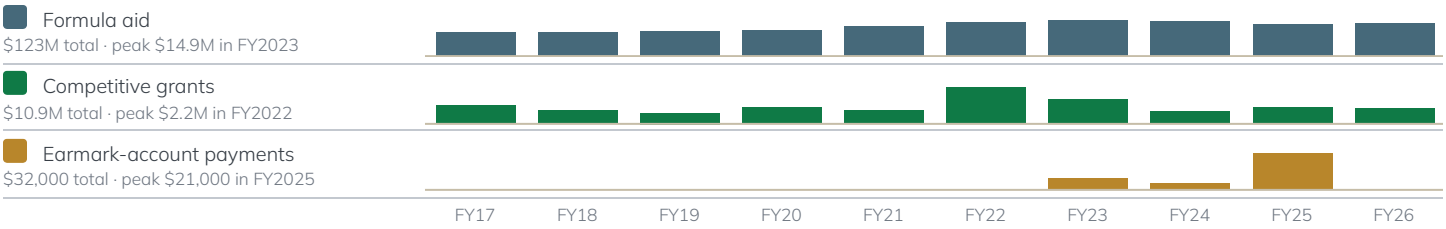
Montague received more than its share of discretionary money on all four measures; its blended score of 84 stays between 82 and 85 under every weighting tested.

STATE MONEY, FY2017–FY2026

Montague's town government and school districts received $123 million in formula aid and $10.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$123M	$10.9M	$32,000
$14,528 per resident (83rd of 351) · gross	$1,282 per resident (64th of 351)	$3.82 per resident (302nd of 351)

Competitive grants to Montague peaked in FY2022 at $2.2 million, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $15 million, are not shown.

EARMARKS

Montague received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	$225,000	$225,000	Not a member
$26.53 per resident (243rd of 351)	$26.53 per resident (254th of 351)	$26.53 per resident (255th of 351)	35 municipalities had none

Placed in the town: four clauses in three of ten budgets; the most recent in FY2025. Every one names Montague directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the town of Montague for upgrades to the water pollution control facility"	Enacted names the town
FY2025	$50,000	"Montague for infrastructure improvements at the Gill Montague council on aging"	Enacted names the town
FY2023	$50,000	"the town of Montague for municipal building roof improvements"	Enacted names the town
FY2020	$25,000	"the Unity Park Fieldhouse roof improvement project in Montague"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Montague received 2.38 times its proportional share of competitive grant awards.

Local road miles **103.1** 85th of 351 · 12.2 per 1,000 residents (86th of 351)	Town-owned bridges, replacement cost **$27.9M** scored exposure $9.7M · three in poor condition	Road-stream crossings **102** 114th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.1 sq mi** 24% state-owned	Seasonal homes **1%** share of housing units	Peak service population **8,559** residents plus seasonal	Core infrastructure index **1.52** roads, culverts, dams, coast, flood, energy

Burden index 2.38; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,758 acres** 24.7% of land area · FY2026	State-owned land PILOT, FY2026 **$375,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$78.92** statewide $117 · FY2026	New growth per resident **$19,556** FY2017–2025 · 194th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.7% of Montague's general-fund spending in FY2025, down from 10.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.1%** $1.4M of $13.6M · median town 14.1%	FY2016 **9.2%** $1.6M of $17.7M · median town 12.2%	FY2025 **8.7%** $2.2M of $25.7M · median town 11.5%	Net of state charges, FY2025 **8.3%** FY2010: 9.5% · median town 10.0%

Montague's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Montague's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 5.1% above its FY2006 aid grown by Boston-area consumer prices and 6.6% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $2.2 million in FY2025, +62.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.9%** $838,000 to $1.3M · all towns +54.0%	All fixed costs, FY2016–25 **+44.8%** $1.9M to $2.7M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Montague's health insurance would have been $1.05 million in FY2025; it was $1.30 million, $252,000 above the path. Its fixed costs would have been $2.34 million in FY2025; it was $2.71 million, $373,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Montague came to $225,000, 48.9% of the $460,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$225,000	48.9%	28.2%
Placed in the town	$225,000	48.9%	42.3%
Everything placed	$225,000	48.9%	45.2%

SCHOOLS

Montague's required school contribution is 2.7% of median household income, 144th highest of 351.

Chapter 70 aid, FY2026 **$8.2M** attributed to the town	Required local contribution **$7.3M** FY2026
Share of household income **2.7%** 144th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+11%** after inflation

Montague has no school district of its own. Its pupils attend Montague, Gill-Montague and Franklin County; Montague accounts for 100%, 88% and 12% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Montague received $11.2 million in earmarks placed in the town and competitive grants over ten years, about the $10.7 million its size, need and institutions predict.

PEERS

Montague ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Montague this town	**55**	**$14,528**	**$1,282**	**$26.53**	**2.38**	**2.7%**
Spencer peer	59	$16,090	$675	$55.46	0.85	2.5%
Templeton peer	61	$18,577	$420	$27.27	0.60	2.0%
North Brookfield peer · lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%
Palmer peer	58	$16,159	$720	$29.88	0.54	2.2%
Warren peer	67	$20,879	$1,969	$10.98	1.67	2.5%
Greenfield best in class of 30	53	$14,180	$1,705	$134	4.81	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Monterey

Town · Berkshire County · 954 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Southern Berkshire Regional School District, shared with Alford, Egremont, New Marlborough and Sheffield

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Monterey scores 67 on the Fairness Index for all state aid and 98 for discretionary money. Fifty is a fair share.

ALL STATE AID

67 / 100
18th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	76	53	76

Rank under other weightings: 9th to 38th.

Stable high: above 55 under every weighting

Monterey received more than its share of state aid on all four measures; its blended score of 67 stays between 61 and 72 under every weighting tested.

DISCRETIONARY MONEY ONLY

98 / 100
3rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
99	99	96	99

Rank under other weightings: 2nd to 3rd.

Stable high: above 55 under every weighting

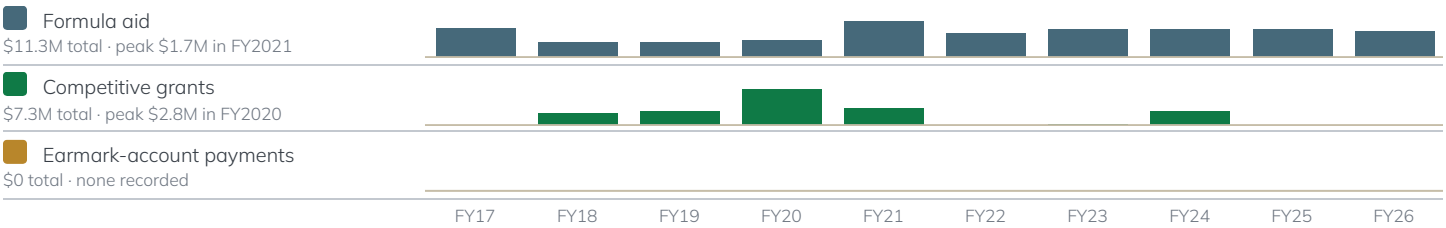
Monterey received more than its share of discretionary money on all four measures; its blended score of 98 stays between 98 and 99 under every weighting tested.

STATE MONEY, FY2017–FY2026

Monterey's town government and school districts received $11.3 million in formula aid and $7.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.3M	$7.3M	$0
$11,798 per resident (133rd of 351) · gross	$7,628 per resident (6th of 351)	$0 per resident (339th of 351)

Competitive grants to Monterey peaked in FY2020 at $2.8 million, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 954 residents, a single payment moves Monterey's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.9 million, are not shown.

EARMARKS

No local earmark was placed in Monterey in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Monterey's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
New Marlborough	$0	$0	$0	$0
Chilmark	$0	$0	$0	$0
Alford	$0	$0	$0	$0
Aquinnah	$100,000	$100,000	$100,000	$150
Tyringham	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Monterey received 3.68 times its proportional share of competitive grant awards.

Local road miles **48.1** 262nd of 351 · 50.5 per 1,000 residents (27th of 351)	Town-owned bridges, replacement cost **$8.8M** scored exposure $3M · one in poor condition	Road-stream crossings **54** 246th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.4 sq mi** 28% state-owned	Seasonal homes **57%** share of housing units	Peak service population **2,194** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 3.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,694 acres** 27.7% of land area · FY2026	State-owned land PILOT, FY2026 **$359,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$76.40** statewide $117 · FY2026	New growth per resident **$69,033** FY2017–2025 · 18th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

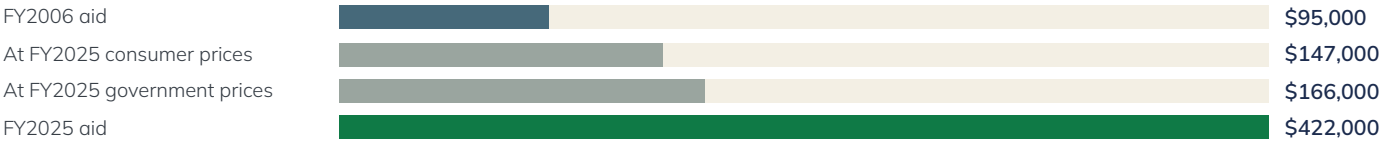
State aid covered 7.6% of Monterey's general-fund spending in FY2025, up from 3.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.6%** $95,000 of $2.6M · median town 14.1%	FY2016 **7.4%** $290,000 of $3.9M · median town 12.2%	FY2025 **7.6%** $422,000 of $5.6M · median town 11.5%	Net of state charges, FY2025 **7.6%** FY2010: 5.9% · median town 10.0%

Monterey's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $286,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Monterey's state aid kept pace with both price measures: FY2025 aid was 186.6% above its FY2006 aid grown by Boston-area consumer prices and 154.7% above grown by the government price index.



Gross state aid went from $95,000 in FY2006 to $422,000 in FY2025, +344.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–1.1%** $156,000 to $154,000 · all towns +54.0%	All fixed costs, FY2016–25 **+40.3%** $324,000 to $454,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Monterey's health insurance would have been $194,000 in FY2025; it was $154,000, $40,000 below the path. Its fixed costs would have been $404,000 in FY2025; it was $454,000, $50,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Monterey's reported health insurance fell from $156,000 in FY2016 to $154,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Monterey's required school contribution is 1.8% of median household income, 321st highest of 351.

Chapter 70 aid, FY2026 **$299,000** attributed to the town	Required local contribution **$1M** FY2026
Share of household income **1.8%** 321st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–17%** after inflation

Monterey has no school district of its own. Its pupils attend Southern Berkshire; Monterey accounts for 13% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Monterey received $7.5 million in earmarks placed in the town and competitive grants over ten years, 2.4 times the $3.1 million its size, need and institutions predict.

PEERS

Monterey is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Monterey this town	**67**	**$11,798**	**$7,628**	**$0**	**3.68**	**1.8%**
New Marlborough peer · lowest in class of 30	49	$8,719	$3,098	$0	2.06	2.0%
Chilmark peer	33	$5,153	$334	$0	0.74	1.4%
Alford peer	43	$5,565	$1,817	$0	0.13	0.9%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
Tyringham peer	34	$4,388	$85.59	$0	0.28	1.0%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Montgomery

Town · Hampden County · 796 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	Hampden and Hampshire · John C. Velis	Gateway Regional School District, shared with Blandford, Chester, Huntington, Middlefield and Russell	Pioneer Valley Planning Commission

FAIRNESS INDEX

Montgomery scores 42 on the Fairness Index for all state aid and 41 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

191st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	47	39	42

Rank under other weightings: 185th to 202nd.

Stable low: below 45 under every weighting

Montgomery received less than its share of state aid on all four measures; its blended score of 42 stays between 41 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

41 / 100

216th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	49	30	43

Rank under other weightings: 212th to 225th.

Stable low: below 45 under every weighting

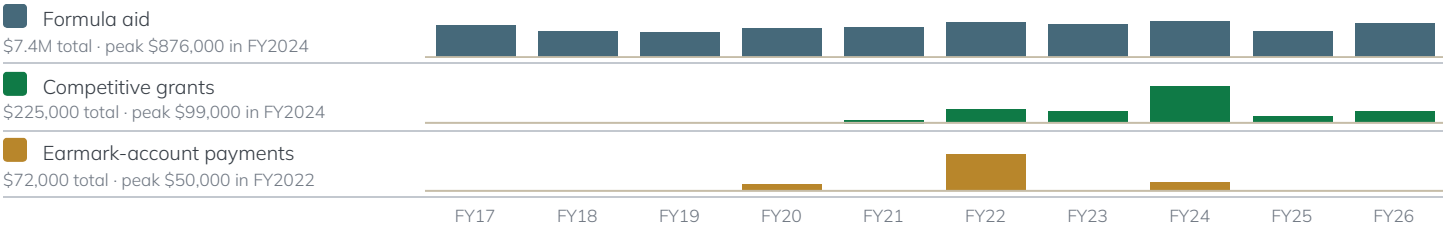
Montgomery received less than its share of discretionary money on all four measures; its blended score of 41 stays between 38 and 44 under every weighting tested.

STATE MONEY, FY2017–FY2026

Montgomery's town government and school districts received $7.4 million in formula aid and $225,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$7.4M	**$225,000**	**$72,000**
$9,334 per resident (204th of 351) · gross	$283 per resident (216th of 351)	$89.87 per resident (29th of 351)

Competitive grants to Montgomery peaked in FY2024 at $99,000, 44% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 796 residents, a single payment moves Montgomery's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $553,000, are not shown.

EARMARKS

Montgomery received $36,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$36,000	**$36,000**	**$36,000**	**Not a member**
$45.37 per resident (160th of 351)	$45.37 per resident (183rd of 351)	$45.37 per resident (185th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2024. Every one names Montgomery directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$20,000	"public safety improvements in the town of Montgomery"	Enacted names the town
FY2020	$10,000 (split four ways)	"equally between the municipalities of Russell, Southampton, Montgomery and Westfield for the maintenance and repair of war memorials"	Enacted names the town
FY2019	$6,111 (split nine ways)	"equally between the councils on aging located in the municipalities of Agawam, Chicopee, Easthampton, Holyoke. Montgomery, Russell, Southampton…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Montgomery received 27% of its proportional share of competitive grant awards.

Local road miles **30.4** 324th of 351 · 38.2 per 1,000 residents (33rd of 351)	Town-owned bridges, replacement cost **$7M** scored exposure $2.4M · three in poor condition	Road-stream crossings **42** 288th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.0 sq mi** 8% state-owned	Seasonal homes **1%** share of housing units	Peak service population **801** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **690 acres** 7.2% of land area · FY2026	State-owned land PILOT, FY2026 **$9,360** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$13.56** statewide $117 · FY2026	New growth per resident **$19,033** FY2017–2025 · 202nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.2% of Montgomery's general-fund spending in FY2025, down from 8.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.2%** $105,000 of $1.3M · median town 14.1%	FY2016 **6.4%** $111,000 of $1.7M · median town 12.2%	FY2025 **7.2%** $155,000 of $2.1M · median town 11.5%	Net of state charges, FY2025 **6.7%** FY2010: 6.1% · median town 10.0%

Montgomery's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $227,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Montgomery's state aid did not keep pace with either price measure: FY2025 aid was 5.0% below its FY2006 aid grown by Boston-area consumer prices and 15.5% below grown by the government price index.

Gross state aid went from $105,000 in FY2006 to $155,000 in FY2025, +47.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **−2.0%** $51,000 to $50,000 · all towns +54.0%	All fixed costs, FY2016–25 **+35.1%** $112,000 to $152,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Montgomery's health insurance would have been $63,000 in FY2025; it was $50,000, $14,000 below the path. Its fixed costs would have been $140,000 in FY2025; it was $152,000, $11,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2025 (−34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Montgomery's reported health insurance fell from $51,000 in FY2016 to $50,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$36,000	no increase	28.2%
Placed in the town	$36,000	no increase	42.3%
Everything placed	$36,000	no increase	45.2%

SCHOOLS

Montgomery's required school contribution is 2.3% of median household income, 282nd highest of 351.

Chapter 70 aid, FY2026 **$360,000** attributed to the town	Required local contribution **$899,000** FY2026
Share of household income **2.3%** 282nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Montgomery has no school district of its own. Its pupils attend Montgomery and Gateway; Montgomery accounts for 100% and 9% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Montgomery received $262,000 in earmarks placed in the town and competitive grants over ten years, 21% of the $1.2 million its size, need and institutions predict.

PEERS

Montgomery ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Montgomery this town	**42**	**$9,334**	**$283**	**$45.37**	**0.27**	**2.3%**
Washington peer	56	$15,534	$6,984	$95.06	1.16	2.6%
Peru peer	61	$22,437	$3,220	$39.68	1.98	2.8%
Cummington peer · lowest in class of 30	49	$9,157	$4,050	$0	1.51	1.5%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Whately peer	45	$9,968	$1,484	$28.91	1.02	2.4%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Mount Washington

Town · Berkshire County · 193 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Mount Washington operates no schools of its own and belongs to no regional district in DESE's FY2026 files.

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Mount Washington scores 62 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

62 / 100
36th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	73	41	69

Rank under other weightings: 17th to 62nd.

Stable high: above 55 under every weighting

Mount Washington received more than its share of state aid on three of four measures; its blended score of 62 stays between 57 and 68 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100
29th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	86	96

Rank under other weightings: 25th to 32nd.

Stable high: above 55 under every weighting

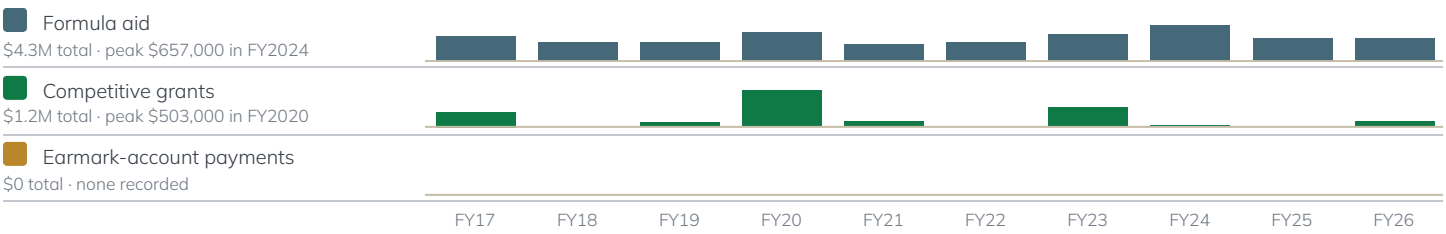
Mount Washington received more than its share of discretionary money on all four measures; its blended score of 94 stays between 92 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Mount Washington's town government and school districts received $4.3 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$4.3M	$1.2M	$0
$22,393 per resident (17th of 351) · gross	$6,365 per resident (10th of 351)	$0 per resident (339th of 351)

Competitive grants to Mount Washington peaked in FY2020 at $503,000, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 193 residents, a single payment moves Mount Washington's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $94,000, are not shown.

EARMARKS

No local earmark was placed in Mount Washington in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Mount Washington's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Tyringham	$0	$0	$0	$0
Alford	$0	$0	$0	$0
Aquinnah	$100,000	$100,000	$100,000	$150
Monterey	$0	$0	$0	$0
Gosnold	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Mount Washington received 1.07 times its proportional share of competitive grant awards.

Local road miles **17.4** 341st of 351 · 90.3 per 1,000 residents (4th of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $327,000 · none in poor condition	Road-stream crossings **30** 315th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.3 sq mi** 50% state-owned	Seasonal homes **49%** share of housing units	Peak service population **418** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 1.07; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **8,409 acres** 59.0% of land area · FY2026	State-owned land PILOT, FY2026 **$359,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$42.68** statewide $117 · FY2026	New growth per resident **$73,200** FY2017–2025 · 14th of 351 · median town $20,524

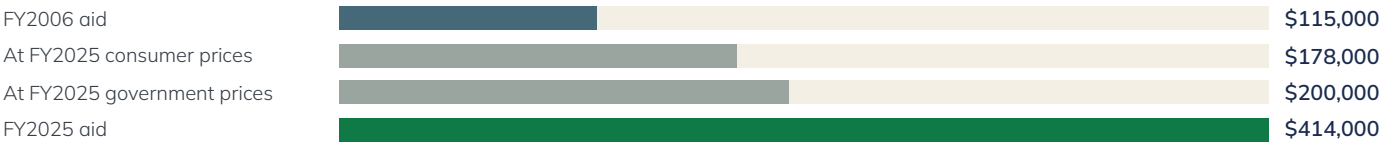
COSTS AND THE 2½% LIMIT

State aid covered 44.6% of Mount Washington's general-fund spending in FY2025, up from 23.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.5%** $115,000 of $486,000 · median town 14.1%	FY2016 **52.4%** $346,000 of $660,000 · median town 12.2%	FY2025 **44.6%** $414,000 of $927,000 · median town 11.5%	Net of state charges, FY2025 **44.6%** FY2010: 30.1% · median town 10.0%

Mount Washington's state aid kept pace with both price measures: FY2025 aid was 133.0% above its FY2006 aid grown by Boston-area consumer prices and 107.1% above grown by the government price index.



Gross state aid went from $115,000 in FY2006 to $414,000 in FY2025, +261.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **−11.8%** $54,000 to $48,000 · all towns +54.0%	All fixed costs, FY2016–25 **+5.1%** $97,000 to $102,000 · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Mount Washington's health insurance would have been $67,000 in FY2025; it was $48,000, $20,000 below the path. Its fixed costs would have been $121,000 in FY2025; it was $102,000, $19,000 below the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Mount Washington's reported health insurance fell from $54,000 in FY2016 to $48,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Mount Washington's required school contribution is 0.4% of median household income, the third-lowest of 351.

Chapter 70 aid, FY2026 **$14,000** attributed to the town	Required local contribution **$42,000** FY2026
Share of household income **0.4%** 349th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–56%** after inflation

Mount Washington operates no schools. DESE carries it as a non-operating district, and its pupils attend schools in other districts. Mount Washington had five resident pupils in FY2026, so per-pupil changes swing from year to year.

EXPECTED AND ACTUAL

Mount Washington received $1.2 million in earmarks placed in the town and competitive grants over ten years, 77% of the $1.6 million its size, need and institutions predict.

PEERS

Mount Washington is one of eight municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Mount Washington this town	**62**	**$22,393**	**$6,365**	**$0**	**1.07**	**0.4%**
Tyringham peer · lowest in class of 30	34	$4,388	$85.59	$0	0.28	1.0%
Alford peer	43	$5,565	$1,817	$0	0.13	0.9%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Gosnold peer	82	$32,727	$214,090	$0	0.76	not available
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Nahant

Town · Essex County · 3,325 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Essex · Sean Reid

STATE SENATE

Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS

Nahant Public Schools, the town's own district

Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Nahant scores 32 on the Fairness Index for all state aid and 78 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

286th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	31	40	31

Rank under other weightings: 246th to 314th.

Stable low: below 45 under every weighting

Nahant received less than its share of state aid on all four measures; its blended score of 32 stays between 31 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

78 / 100

81st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	80	75	80

Rank under other weightings: 79th to 85th.

Stable high: above 55 under every weighting

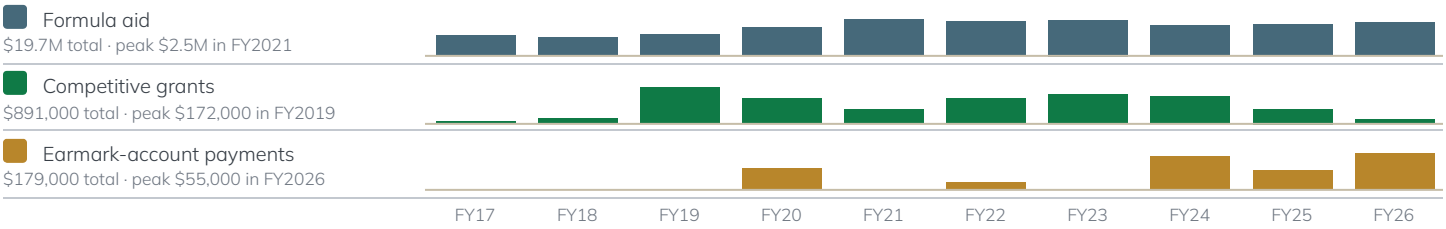
Nahant received more than its share of discretionary money on all four measures; its blended score of 78 stays between 77 and 79 under every weighting tested.

STATE MONEY, FY2017–FY2026

Nahant's town government and school districts received $19.7 million in formula aid and $891,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$19.7M	**$891,000**	**$179,000**
$5,917 per resident (337th of 351) · gross	$268 per resident (221st of 351)	$53.97 per resident (69th of 351)

Competitive grants to Nahant were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.5 million, are not shown.

EARMARKS

Nahant received $2.3 million in local earmarks naming the town, $453,000 placed in the town and $2.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.3M	**$453,000**	**$2.3M**	**Not a member**
$697 per resident (1st of 351)	$136 per resident (36th of 351)	$697 per resident (3rd of 351)	35 municipalities had none

Placed in the town: 15 clauses in seven of ten budgets; the most recent in FY2026. Every one names Nahant directly.

Names the town includes $1.9 million in clauses that name Nahant but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $1.9 million in ten clauses for state facilities located in Nahant (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"a public works utility vehicle for the maintenance of the Nahant Greenlawn cemetery and public park land in Nahant"	Enacted names the town
FY2024	$50,000	"safety and security improvements for the Johnson school in Nahant"	Enacted names the town
FY2023	$50,000	"the department of public works in the town of Nahant for a parks utility vehicle"	Enacted names the town
FY2023	$50,000	"repairs to the town of Nahant's council on aging facilities"	Enacted names the town
FY2022	$50,000	"municipal fiber optic network improvements in the town of Nahant"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Nahant received 69% of its proportional share of competitive grant awards.

Local road miles **16.6** 343rd of 351 · 5.0 per 1,000 residents (234th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **1.1 sq mi** 9% state-owned	Seasonal homes **5%** share of housing units	Peak service population **3,517** residents plus seasonal	Core infrastructure index **1.00** roads, culverts, dams, coast, flood, energy

Burden index 0.69; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$2,221** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,073** statewide $117 · FY2026	New growth per resident **$17,826** FY2017–2025 · 217th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.9% of Nahant's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $845,000 of $9.1M · median town 14.1%	FY2016 **8.9%** $913,000 of $10.3M · median town 12.2%	FY2025 **7.9%** $1.2M of $14.6M · median town 11.5%	Net of state charges, FY2025 **5.5%** FY2010: 7.4% · median town 10.0%

Nahant's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $49,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Nahant's state aid did not keep pace with either price measure: FY2025 aid was 11.7% below its FY2006 aid grown by Boston-area consumer prices and 21.5% below grown by the government price index.

Gross state aid went from $845,000 in FY2006 to $1.2 million in FY2025, +37.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.9%** $741,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+58.4%** $1.7M to $2.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Nahant's health insurance would have been $926,000 in FY2025; it was $1.15 million, $223,000 above the path. Its fixed costs would have been $2.13 million in FY2025; it was $2.70 million, $571,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Nahant came to $2.1 million, 5.2 times the $407,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.1M	5.2 times	28.2%
Placed in the town	$390,000	95.8%	42.3%
Everything placed	$2.1M	5.2 times	45.2%

SCHOOLS

Nahant's required school contribution is 1.6% of median household income, 334th highest of 351.

Chapter 70 aid, FY2026 **$663,000** to the town's district	Required local contribution **$2.8M** FY2026
Share of household income **1.6%** 334th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Nahant runs its own school district and also belongs to Essex North Shore; Nahant accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Nahant received $1.4 million in earmarks placed in the town and competitive grants over ten years, 68% of the $2.1 million its size, need and institutions predict.

PEERS

Nahant ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Nahant this town	**32**	**$5,917**	**$268**	**$136**	**0.69**	**1.6%**
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Orleans peer	26	$4,954	$820	$115	1.26	1.7%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%
Erving peer · lowest in class of 30	50	$7,326	$3,750	$0	8.12	4.7%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NANTUCKET COUNTY

Nantucket

Town · Nantucket County · 14,483 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Nantucket Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Nantucket Planning and Economic Development Commission

FAIRNESS INDEX

Nantucket scores 25 on the Fairness Index for all state aid and 46 for discretionary money. Fifty is a fair share.

ALL STATE AID

25 / 100

344th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	39	21	18

Rank under other weightings: 333rd to 350th.

Stable low: below 45 under every weighting

Nantucket received less than its share of state aid on all four measures; its blended score of 25 stays between 22 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

46 / 100

197th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	69	26	44

Rank under other weightings: 174th to 215th.

Weighting-dependent: the range crosses the 45–55 band

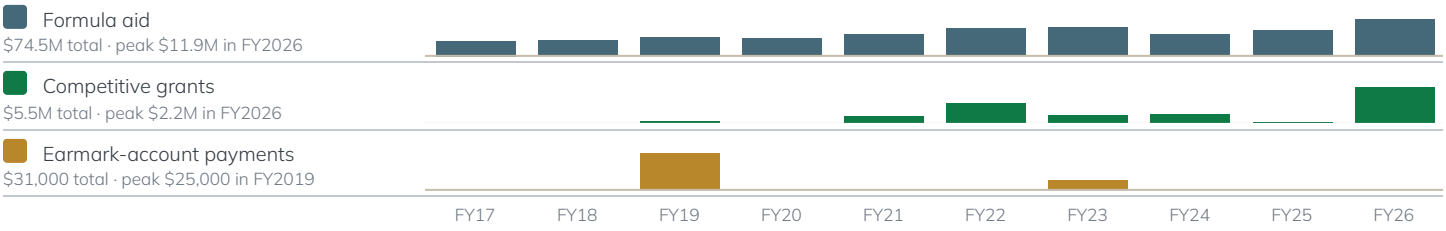
Nantucket received less than its share of discretionary money on three of four measures; its blended score of 46 stays between 40 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Nantucket's town government and school districts received $74.5 million in formula aid and $5.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$74.5M	**$5.5M**	**$31,000**
$5,145 per resident (343rd of 351) · gross	$383 per resident (177th of 351)	$2.16 per resident (311th of 351)

Competitive grants to Nantucket peaked in FY2026 at $2.2 million, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $130 million, are not shown.

EARMARKS

Nantucket received $250,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$250,000	**$250,000**	**$250,000**	**Not a member**
$17.26 per resident (274th of 351)	$17.26 per resident (284th of 351)	$17.26 per resident (284th of 351)	35 municipalities had none

Placed in the town: seven clauses in seven of ten budgets; the most recent in FY2026. Every one names Nantucket directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$50,000	"the Museum of African American History, Incorporated in the town of Nantucket for operational support and upgrades to the historic African Meeting..."	Enacted names the town
FY2025	$50,000	"the Museum of African American History, Incorporated in the town of Nantucket for security upgrades at the African Meeting House"	Enacted names the town
FY2020	$40,000	"the Nantucket Cottage hospital for off-island medical transportation, including the transportation of patients with behavioral health conditions"	Enacted names the town
FY2023	$35,000	"the Artists Association of Nantucket, Inc. to provide scholarships for individuals and support mental health programming through the creative arts"	Enacted names the town
FY2024	$25,000	"American Legion Post 82 in the town of Nantucket for repairing and replacing veteran gravestones and honoring veterans"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Nantucket received 81% of its proportional share of competitive grant awards.

Local road miles **124.6** 57th of 351 · 8.6 per 1,000 residents (127th of 351)	Town-owned bridges, replacement cost **$4.6M** scored exposure $1.1M · none in poor condition	Road-stream crossings **61** 226th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **46.2 sq mi** 0% state-owned	Seasonal homes **55%** share of housing units	Peak service population **33,250** residents plus seasonal	Core infrastructure index **0.27** roads, culverts, dams, coast, flood, energy

Burden index 0.81; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **89 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$343,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,862** statewide $117 · FY2026	New growth per resident **$252,569** FY2017–2025 · 3rd of 351 · median town $20,524

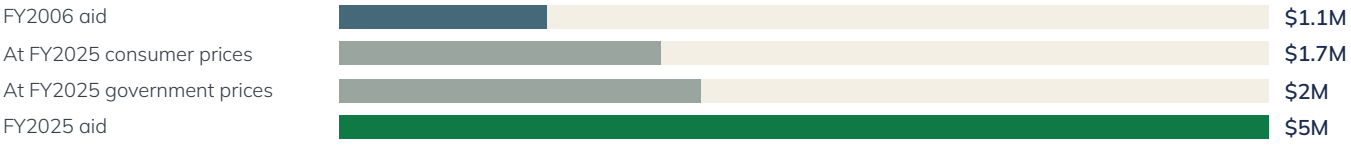
COSTS AND THE 2½% LIMIT

State aid covered 4.0% of Nantucket's general-fund spending in FY2025, up from 1.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **1.7%** $1.1M of $64.4M · median town 14.1%	FY2016 **4.3%** $3.2M of $73.5M · median town 12.2%	FY2025 **4.0%** $5M of $126M · median town 11.5%	Net of state charges, FY2025 **3.0%** FY2010: 2.0% · median town 10.0%

Nantucket's state aid kept pace with both price measures: FY2025 aid was 188.3% above its FY2006 aid grown by Boston-area consumer prices and 156.2% above grown by the government price index.



Gross state aid went from $1.1 million in FY2006 to $5 million in FY2025, +347.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.1%** $14.4M to $20.4M · all towns +54.0%	All fixed costs, FY2016–25 **+58.6%** $18.1M to $28.7M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Nantucket's health insurance would have been $17.9 million in FY2025; it was $20.4 million, $2.47 million above the path. Its fixed costs would have been $22.6 million in FY2025; it was $28.7 million, $6.09 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2022 (+78%) and FY2023 (–33%); health insurance changed by more than 30% in one year in FY2022 (+100%) and FY2023 (–41%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Nantucket came to $200,000, 3.3% of the $6.04 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$200,000	3.3%	28.2%
Placed in the town	$200,000	3.3%	42.3%
Everything placed	$200,000	3.3%	45.2%

SCHOOLS

Nantucket's required school contribution is 3.0% of median household income, 65th highest of 351.

Chapter 70 aid, FY2026 **$4.8M** to the town's district	Required local contribution **$22.4M** FY2026
Share of household income **3.0%** 65th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Nantucket runs its own school district.

EXPECTED AND ACTUAL

Nantucket received $9 million in earmarks placed in the town and competitive grants over ten years, 51% of the $17.6 million its size, need and institutions predict.

PEERS

Nantucket ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Nantucket this town	**25**	**$5,145**	**$383**	**$17.26**	**0.81**	**3.0%**
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Concord peer	34	$8,067	$148	$71.06	0.61	2.5%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Harvard lowest in class of 30	39	$8,662	$563	$18.05	0.96	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Natick

Town · Middlesex County · 36,873 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Middlesex · David Paul Linsky

STATE SENATE

Middlesex and Norfolk · Karen E. Spilka

SCHOOL DISTRICTS

Natick Public Schools, the town's own district

South Middlesex Regional Vocational Technical School District, vocational, shared with Ashland, Framingham, Holliston and Hopkinton

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Natick scores 28 on the Fairness Index for all state aid and 19 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

332nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	36	23	25

Rank under other weightings: 315th to 338th.

Stable low: below 45 under every weighting

Natick received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

19 / 100

317th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
17	25	18	17

Rank under other weightings: 312th to 321st.

Stable low: below 45 under every weighting

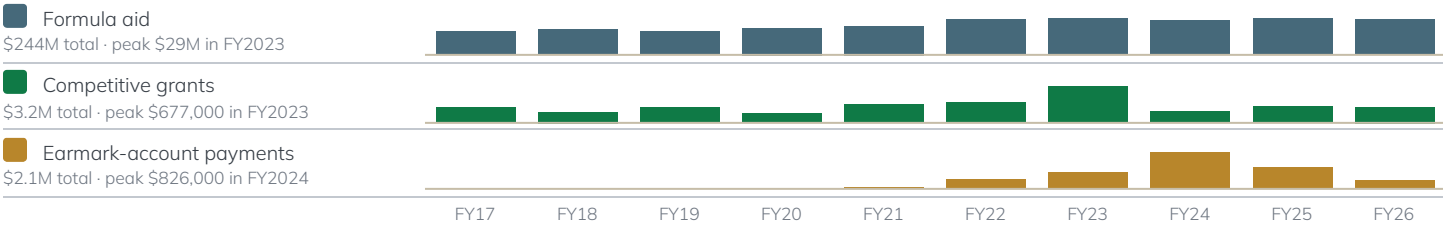
Natick received less than its share of discretionary money on all four measures; its blended score of 19 stays between 18 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Natick's town government and school districts received $244 million in formula aid and $3.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$244M	$3.2M	$2.1M
$6,624 per resident (311th of 351) · gross	$86.76 per resident (331st of 351)	$58.15 per resident (61st of 351)

Competitive grants to Natick peaked in FY2023 at $677,000, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $36 million, are not shown.

EARMARKS

Natick received $2.6 million in local earmarks naming the town, $3 million placed in the town and $3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.6M	$3M	$3M	Not a member
$70.08 per resident (83rd of 351)	$82.28 per resident (97th of 351)	$82.28 per resident (103rd of 351)	35 municipalities had none

Placed in the town: 52 clauses in ten of ten budgets; the most recent in FY2026. $2.6 million came in clauses that name Natick; the other $450,000 went to organizations based in Natick, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$215,000	"public health, veterans and opioid initiatives in the town of Natick"	Enacted names the town
FY2018	$200,000	"the Museum of World War II"	Enacted recipient based here
FY2017	$200,000	"the Museum of World War II"	Enacted recipient based here
FY2024	$125,000 (split two ways)	"a study of the Charles river, including, but not limited to, flooding mitigation impacts and fish passage improvements as it relates to potential…"	Enacted names the town
FY2026	$117,000 (split six ways)	"communities in the Metrowest region, including the city of Framingham and the towns of Ashland, Holliston, Hopkinton, Medway and Natick to address…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Natick received 56% of its proportional share of competitive grant awards.

Local road miles **127.2** 53rd of 351 · 3.5 per 1,000 residents (301st of 351)	Town-owned bridges, replacement cost **$9.7M** scored exposure $2.9M · two in poor condition	Road-stream crossings **98** 120th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **15.0 sq mi** 7% state-owned	Seasonal homes **1%** share of housing units	Peak service population **37,102** residents plus seasonal	Core infrastructure index **3.00** roads, culverts, dams, coast, flood, energy

Burden index 0.56; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **192 acres** 2.0% of land area · FY2026	State-owned land PILOT, FY2026 **$199,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,041** statewide $117 · FY2026	New growth per resident **$32,827** FY2017–2025 · 92nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.9% of Natick's general-fund spending in FY2025, down from 12.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.1%** $11M of $90.9M · median town 14.1%	FY2016 **10.3%** $13M of $126M · median town 12.2%	FY2025 **9.9%** $19M of $192M · median town 11.5%	Net of state charges, FY2025 **9.2%** FY2010: 9.1% · median town 10.0%

Natick's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $276,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Natick's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 11.1% above its FY2006 aid grown by Boston-area consumer prices and 1.3% below grown by the government price index.

Gross state aid went from $11 million in FY2006 to $19 million in FY2025, +72.3% in dollars. Flag: in FY2010, $917,000 of Natick's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+36.5%** $13.5M to $18.5M · all towns +54.0%	All fixed costs, FY2016–25 **+55.6%** $23.3M to $36.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Natick's health insurance would have been $16.9 million in FY2025; it was $18.5 million, $1.57 million above the path. Its fixed costs would have been $29.2 million in FY2025; it was $36.3 million, $7.18 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Natick came to $2.3 million, 46.3% of the $4.94 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.3M	46.3%	28.2%
Placed in the town	$2.7M	55.4%	42.3%
Everything placed	$2.7M	55.4%	45.2%

SCHOOLS

Natick's required school contribution is 2.7% of median household income, 148th highest of 351.

Chapter 70 aid, FY2026 **$14.8M** to the town's district	Required local contribution **$57.9M** FY2026
Share of household income **2.7%** 148th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+23%** after inflation

Natick runs its own school district and also belongs to South Middlesex; Natick accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Natick received $8.6 million in earmarks placed in the town and competitive grants over ten years, 73% of the $11.8 million its size, need and institutions predict.

PEERS

Natick ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Natick this town	**28**	**$6,624**	**$86.76**	**$82.28**	**0.56**	**2.7%**
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Milton peer · best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Burlington peer	35	$7,194	$367	$102	0.46	3.0%
Danvers peer	30	$6,947	$129	$53.36	0.20	2.9%
Canton peer	29	$6,511	$84.68	$52.89	0.29	2.9%
Scituate lowest in class of 30	34	$7,209	$711	$18.25	3.23	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Needham

Town · Norfolk County · 32,459 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Norfolk · Joshua Tarsky

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Needham Public Schools, the town's own district

Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Concord, Dover, Lancaster, Lexington and Stow

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Needham scores 28 on the Fairness Index for all state aid and 11 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

322nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	46	20	22

Rank under other weightings: 294th to 342nd.

Stable low: below 45 under every weighting

Needham received less than its share of state aid on all four measures; its blended score of 28 stays between 24 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

11 / 100

345th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
8	19	8	7

Rank under other weightings: 342nd to 348th.

Stable low: below 45 under every weighting

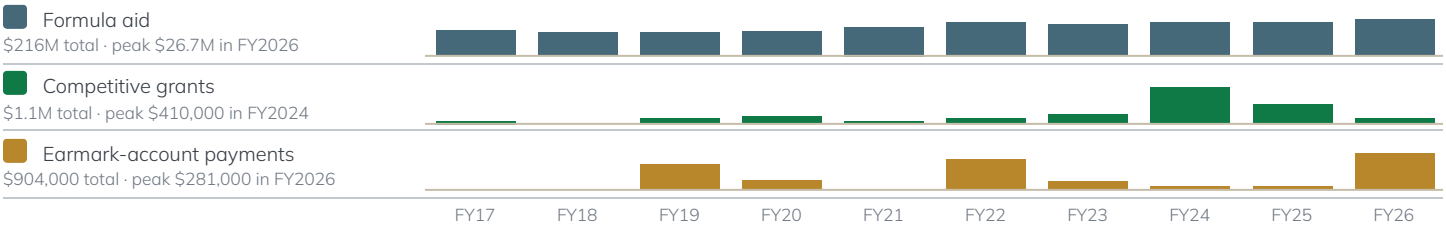
Needham received less than its share of discretionary money on all four measures; its blended score of 11 stays between 9 and 12 under every weighting tested.

STATE MONEY, FY2017–FY2026

Needham's town government and school districts received $216 million in formula aid and $1.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$216M	**$1.1M**	**$904,000**
$6,664 per resident (306th of 351) · gross	$33.58 per resident (351st of 351)	$27.85 per resident (156th of 351)

Competitive grants to Needham peaked in FY2024 at $410,000, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $32.1 million, are not shown.

EARMARKS

Needham received $1.9 million in local earmarks naming the town, $4.9 million placed in the town and $4.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.9M	**$4.9M**	**$4.9M**	**Not a member**
$59.41 per resident (120th of 351)	$150 per resident (26th of 351)	$150 per resident (32nd of 351)	35 municipalities had none

Placed in the town: 38 clauses in ten of ten budgets; the most recent in FY2026. $1.9 million came in clauses that name Needham; the other $2.9 million went to organizations based in Needham, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$600,000	"the Ellie Fund, Inc. to partner with community health centers to educate providers, patients and families on the availability of breast cancer..."	Enacted recipient based here
FY2025	$600,000	"Ellie Fund, Inc. to partner with community health centers to educate providers, patients and families on the availability of breast cancer support..."	Enacted recipient based here
FY2024	$600,000	"the Ellie Fund, Inc. to partner with community health centers to educate providers, patients and families on the availability of breast cancer..."	Enacted recipient based here
FY2026	$350,000	"support operations and hygiene product acquisition for Hope and Comfort, Inc"	Enacted recipient based here
FY2025	$350,000	"Hope and Comfort, Inc. to support operations and hygiene product acquisition"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Needham received 21% of its proportional share of competitive grant awards.

Local road miles **124.8** 56th of 351 · 3.8 per 1,000 residents (285th of 351)	Town-owned bridges, replacement cost **$9.8M** scored exposure $1.9M · none in poor condition	Road-stream crossings **49** 266th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **12.3 sq mi** 7% state-owned	Seasonal homes **0%** share of housing units	Peak service population **32,459** residents plus seasonal	Core infrastructure index **0.52** roads, culverts, dams, coast, flood, energy

Burden index 0.21; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$75,171** FY2017–2025 · 13th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.9% of Needham's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $7.9M of $85.7M · median town 14.1%	FY2016 **7.9%** $10.8M of $136M · median town 12.2%	FY2025 **6.9%** $16.2M of $233M · median town 11.5%	Net of state charges, FY2025 **6.2%** FY2010: 7.2% · median town 10.0%

Needham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $183,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Needham's state aid kept pace with both price measures: FY2025 aid was 31.6% above its FY2006 aid grown by Boston-area consumer prices and 17.0% above grown by the government price index.

Gross state aid went from $7.9 million in FY2006 to $16.2 million in FY2025, +104.1% in dollars. Flag: in FY2010, $745,000 of Needham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.8%** $16.2M to $24.6M · all towns +54.0%	All fixed costs, FY2016–25 **+63.2%** $27.1M to $44.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Needham's health insurance would have been $20.2 million in FY2025; it was $24.6 million, $4.36 million above the path. Its fixed costs would have been $33.8 million in FY2025; it was $44.2 million, $10.4 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Needham came to $1.8 million, 21.6% of the $8.38 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.8M	21.6%	28.2%
Placed in the town	$3.8M	44.8%	42.3%
Everything placed	$3.8M	44.8%	45.2%

SCHOOLS

Needham's required school contribution is 2.5% of median household income, 215th highest of 351.

Chapter 70 aid, FY2026 **$15M** to the town's district	Required local contribution **$62.6M** FY2026
Share of household income **2.5%** 215th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+23%** after inflation

Needham runs its own school district and also belongs to Minuteman and Norfolk County; Needham accounts for 9% and 0% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Needham received $7.1 million in earmarks placed in the town and competitive grants over ten years, 78% of the $9.1 million its size, need and institutions predict.

PEERS

Needham ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Needham this town	**28**	**$6,664**	**$33.58**	**$150**	**0.21**	**2.5%**
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Andover peer	28	$6,322	$94.07	$42.90	0.79	2.8%
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

New Ashford

Town · Berkshire County · 257 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Berkshire · John Barrett, III	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	New Ashford operates no schools of its own and belongs to no regional district in DESE's FY2026 files.	Berkshire Regional Planning Commission

FAIRNESS INDEX

New Ashford scores 53 on the Fairness Index for all state aid and 88 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

97th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	54	45	58

Rank under other weightings: 84th to 113th.

Weighting-dependent: the range crosses the 45–55 band

New Ashford received more than its share of state aid on three of four measures; its blended score of 53 stays between 51 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

88 / 100

47th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
90	90	80	91

Rank under other weightings: 45th to 52nd.

Stable high: above 55 under every weighting

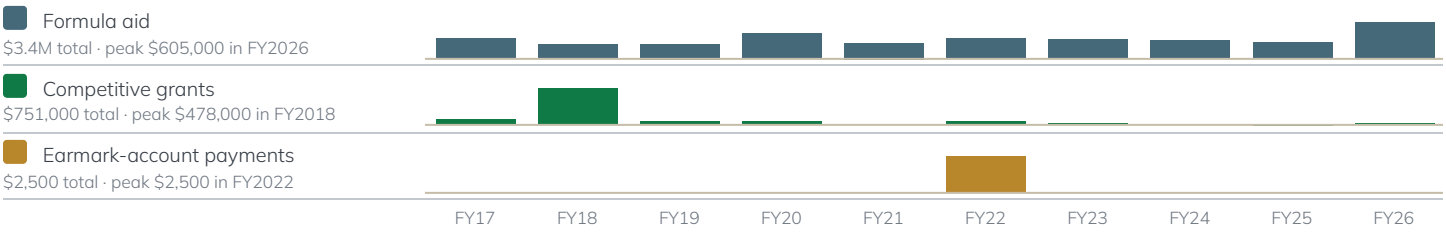
New Ashford received more than its share of discretionary money on all four measures; its blended score of 88 stays between 86 and 90 under every weighting tested.

STATE MONEY, FY2017–FY2026

New Ashford's town government and school districts received $3.4 million in formula aid and $751,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$3.4M	**$751,000**	**$2,500**
$13,073 per resident (110th of 351) · gross	$2,924 per resident (33rd of 351)	$9.73 per resident (262nd of 351)

Competitive grants to New Ashford peaked in FY2018 at $478,000, 64% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 257 residents, a single payment moves New Ashford's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $223,000, are not shown.

EARMARKS

No local earmark was placed in New Ashford in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to New Ashford's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in New Ashford.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: New Ashford's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Hawley	$0	$0	$0	$0
Middlefield	$0	$0	$0	$0
Leyden	$100,000	$100,000	$100,000	$157
Florida	$0	$0	$0	$0
Monroe	$12,000	$12,000	$12,000	$98.36

WHAT THE TOWN CARRIES

Measured against what it maintains, New Ashford received 2% of its proportional share of competitive grant awards.

Local road miles **10.5** 349th of 351 · 40.9 per 1,000 residents (31st of 351)	Town-owned bridges, replacement cost **$1.8M** scored exposure $421,000 · none in poor condition	Road-stream crossings **31** 313th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.5 sq mi** 38% state-owned	Seasonal homes **6%** share of housing units	Peak service population **275** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.02; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,214 acres** 37.3% of land area · FY2026	State-owned land PILOT, FY2026 **$50,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$15.55** statewide $117 · FY2026	New growth per resident **$19,907** FY2017–2025 · 185th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 48.7% of New Ashford's general-fund spending in FY2025, up from 40.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **40.0%** $181,000 of $452,000 · median town 14.1%	FY2016 **41.9%** $238,000 of $569,000 · median town 12.2%	FY2025 **48.7%** $268,000 of $550,000 · median town 11.5%	Net of state charges, FY2025 **47.4%** FY2010: 31.6% · median town 10.0%

New Ashford's state aid did not keep pace with either price measure: FY2025 aid was 4.4% below its FY2006 aid grown by Boston-area consumer prices and 15.0% below grown by the government price index.

Gross state aid went from $181,000 in FY2006 to $268,000 in FY2025, +48.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 not reported FY2016 or FY2025 not reported · all towns +54.0%	All fixed costs, FY2016–25 **–100.0%** $61 to $0 · all towns +53.0%	Years squeezed **0 of 2** fixed costs grew faster than allowed levy growth · seven years not reported	Health insurance not reported years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, New Ashford's fixed costs would have been $76 in FY2025; it was $0, $76 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (–48%) and FY2018 (–100%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

New Ashford's health insurance is not reported for FY2016 or FY2025, so its earmarks are not set against it.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	not reported	28.2%
Placed in the town	$0	not reported	42.3%
Everything placed	$0	not reported	45.2%

SCHOOLS

New Ashford's required school contribution is 0.9% of median household income, the fifth-lowest of 351.

Chapter 70 aid, FY2026 **$123,000** attributed to the town	Required local contribution **$102,000** FY2026
Share of household income **0.9%** 347th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

New Ashford operates no schools. DESE carries it as a non-operating district, and its pupils attend schools in other districts. New Ashford had 12 resident pupils in FY2026, so per-pupil changes swing from year to year.

EXPECTED AND ACTUAL

New Ashford received $751,000 in earmarks placed in the town and competitive grants over ten years, 58% of the $1.3 million its size, need and institutions predict.

PEERS

New Ashford is one of four municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
New Ashford this town	**53**	**$13,073**	**$2,924**	**$0**	**0.02**	**0.9%**
Hawley peer · lowest in class of 30	59	$18,811	$11,175	$0	3.05	2.9%
Middlefield peer	48	$13,430	$2,926	$0	0.24	1.9%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
Monroe peer	63	$20,140	$16,477	$98.36	4.23	not available
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

New Bedford

City · Bristol County · 100,998 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Bristol · Christopher Hendricks
43% of residents
13th Bristol · Antonio F. D. Cabral
41% of residents
9th Bristol · Christopher M. Markey
8% of residents
10th Bristol · Mark D. Sylvia 5% of residents
8th Bristol · Steven J. Ouellette 2% of residents

New Bedford is split among five House districts. Shares are of 2020 residents.

STATE SENATE

Second Bristol and Plymouth · Mark C. Montigny

SCHOOL DISTRICTS

New Bedford Public Schools, the city's own district
Greater New Bedford Regional Vocational Technical School District, vocational, shared with Dartmouth and Fairhaven

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

New Bedford scores 74 on the Fairness Index for all state aid and 60 for discretionary money. Fifty is a fair share.

ALL STATE AID

74 / 100

6th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	66	72	80

Rank under other weightings: 6th to 7th.

Stable high: above 55 under every weighting

New Bedford received more than its share of state aid on all four measures; its blended score of 73 stays between 71 and 76 under every weighting tested.

DISCRETIONARY MONEY ONLY

60 / 100

140th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	49	66	66

Rank under other weightings: 126th to 156th.

Stable high: above 55 under every weighting

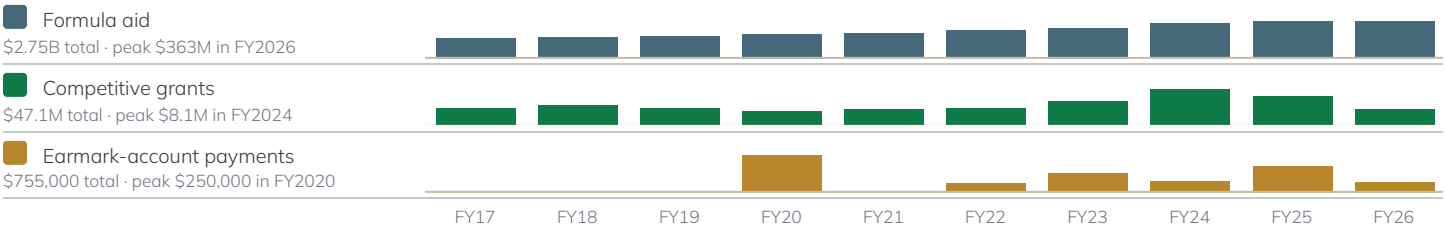
New Bedford received more than its share of discretionary money on three of four measures; its blended score of 60 stays between 57 and 64 under every weighting tested.

STATE MONEY, FY2017–FY2026

New Bedford's town government and school districts received $2.75 billion in formula aid and $47.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.75B	**$47.1M**	**$755,000**
$27,251 per resident (7th of 351) · gross	$466 per resident (147th of 351)	$7.47 per resident (272nd of 351)

Competitive grants to New Bedford were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $148 million, are not shown.

EARMARKS

New Bedford received $10.9 million in local earmarks naming the town, $12.8 million placed in the town and $12.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$10.9M	**$12.8M**	**$12.8M**	**Not a member**
$108 per resident (39th of 351)	$126 per resident (44th of 351)	$127 per resident (49th of 351)	35 municipalities had none

Placed in the town: 134 clauses in ten of ten budgets; the most recent in FY2026. $10.9 million came in clauses that name New Bedford; the other $1.9 million went to organizations based in New Bedford, some of which serve a wider area.

Names the town includes $25,000 in clauses that name New Bedford but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $25,000 in one clause for state facilities located in New Bedford (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$500,000	"the SouthCoast Community Foundation, Inc. to administer a 1-time grant program to provide access to resources for underserved residents in the..."	Enacted names the town
FY2025	$500,000	"the SouthCoast Community Foundation. Inc to administer a 1-time grant program to provide educational, health, wellness, nutritional, arts, cultural..."	Enacted names the town
FY2024	$500,000	"the SouthCoast Community Foundation, Inc. to administer a 1-time grant program to provide educational, health, wellness, nutritional, arts, cultural..."	Enacted names the town
FY2023	$500,000	"the SouthCoast Community Foundation. Inc to administer a 1-time grant program to provide educational, health, wellness, nutritional, arts, cultural..."	Enacted names the town
FY2022	$500,000	"the SouthCoast Community Foundation, Inc., to administer a 1-time grant program to provide educational, health, wellness, housing security and safety..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, New Bedford received 1.34 times its proportional share of competitive grant awards.

Local road miles **269.5** 6th of 351 · 2.7 per 1,000 residents (328th of 351)	Town-owned bridges, replacement cost **$14.7M** scored exposure $3.5M · none in poor condition	Road-stream crossings **77** 176th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **20.0 sq mi** 12% state-owned	Seasonal homes **0%** share of housing units	Peak service population **101,249** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 1.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,404 acres** 11.0% of land area · FY2026	State-owned land PILOT, FY2026 **$41,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$29.24** statewide $117 · FY2026	New growth per resident **$7,772** FY2017–2025 · 340th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 52.7% of New Bedford's general-fund spending in FY2025, down from 55.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **55.7%** $132M of $238M · median town 14.1%	FY2016 **52.3%** $154M of $294M · median town 12.2%	FY2025 **52.7%** $273M of $519M · median town 11.5%	Net of state charges, FY2025 **45.7%** FY2010: 50.9% · median town 10.0%

New Bedford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $33.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

New Bedford's state aid kept pace with both price measures: FY2025 aid was 33.1% above its FY2006 aid grown by Boston-area consumer prices and 18.3% above grown by the government price index.

Gross state aid went from $132 million in FY2006 to $273 million in FY2025, +106.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+86.4%** $49.5M to $92.3M · all towns +54.0%	All fixed costs, FY2016–25 **+82.6%** $63.8M to $116M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, New Bedford's health insurance would have been $61.8 million in FY2025; it was $92.3 million, $30.4 million above the path. Its fixed costs would have been $79.6 million in FY2025; it was $116 million, $36.8 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2023 (+67%); health insurance changed by more than 30% in one year in FY2023 (+82%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming New Bedford came to $9.5 million, 22.1% of the $42.8 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$9.5M	22.1%	28.2%
Placed in the town	$11M	25.8%	42.3%
Everything placed	$11M	25.8%	45.2%

SCHOOLS

New Bedford's required school contribution is 1.9% of median household income, 316th highest of 351.

Chapter 70 aid, FY2026 **$290M** to the town's district	Required local contribution **$46.4M** FY2026
Share of household income **1.9%** 316th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+32%** after inflation

New Bedford runs its own school district and also belongs to Greater New Bedford and Bristol County; New Bedford accounts for 78% and 11% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

New Bedford received $72.9 million in earmarks placed in the town and competitive grants over ten years, 91% of the $80 million its size, need and institutions predict.

PEERS

New Bedford ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
New Bedford this town	**74**	**$27,251**	**$466**	**$126**	**1.34**	**1.9%**
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Lynn peer	72	$27,652	$300	$97.57	1.51	2.5%
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

New Braintree

Town · Worcester County · 973 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE
Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS
Quabbin Regional School District, shared with Barre, Hardwick, Hubbardston and Oakham
Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, Monson, Oakham, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

New Braintree scores 55 on the Fairness Index for all state aid and 78 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

78th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	58	52	51

Rank under other weightings: 63rd to 93rd.

Weighting-dependent: the range crosses the 45–55 band

New Braintree received more than its share of state aid on all four measures; its blended score of 55 stays between 53 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

78 / 100

82nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	82	69	77

Rank under other weightings: 75th to 89th.

Stable high: above 55 under every weighting

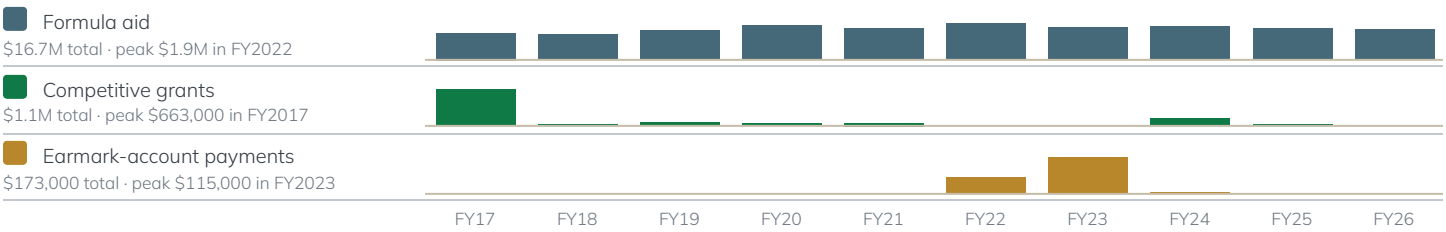
New Braintree received more than its share of discretionary money on all four measures; its blended score of 78 stays between 75 and 81 under every weighting tested.

STATE MONEY, FY2017–FY2026

New Braintree's town government and school districts received $16.7 million in formula aid and $1.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$16.7M	$1.1M	$173,000
$17,191 per resident (49th of 351) · gross	$1,081 per resident (73rd of 351)	$178 per resident (8th of 351)

Competitive grants to New Braintree peaked in FY2017 at $663,000, 63% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 973 residents, a single payment moves New Braintree's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.4 million, are not shown.

EARMARKS

New Braintree received $290,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$290,000	$290,000	$290,000	Not a member
$298 per resident (3rd of 351)	$298 per resident (5th of 351)	$298 per resident (9th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2025. Every one names New Braintree directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$150,000	"upgrades at the New Braintree Regional Dispatch Center, including for a replacement radio system"	Enacted names the town
FY2023	$115,000	"repair and reconstruction of municipal structures in the town of New Braintree"	Enacted names the town
FY2024	$15,000	"the New Braintree fire department"	Enacted names the town
FY2022	$10,000	"the town of New Braintree for improvements to municipal buildings"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, New Braintree received 1.25 times its proportional share of competitive grant awards.

Local road miles **49.9** 255th of 351 · 51.3 per 1,000 residents (26th of 351)	Town-owned bridges, replacement cost **$12.1M** scored exposure $4.6M · 2.5 in poor condition	Road-stream crossings **108** 102nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.8 sq mi** 7% state-owned	Seasonal homes **0%** share of housing units	Peak service population **978** residents plus seasonal	Core infrastructure index **1.74** roads, culverts, dams, coast, flood, energy

Burden index 1.25; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,456 acres** 11.0% of land area · FY2026	State-owned land PILOT, FY2026 **$91,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$62.33** statewide $117 · FY2026	New growth per resident **$19,273** FY2017–2025 · 197th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.0% of New Braintree's general-fund spending in FY2025, down from 9.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.3%** $152,000 of $1.6M · median town 14.1%	FY2016 **8.8%** $192,000 of $2.2M · median town 12.2%	FY2025 **9.0%** $278,000 of $3.1M · median town 11.5%	Net of state charges, FY2025 **8.1%** FY2010: 9.4% · median town 10.0%

New Braintree's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $695,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

New Braintree's state aid kept pace with both price measures: FY2025 aid was 17.8% above its FY2006 aid grown by Boston-area consumer prices and 4.7% above grown by the government price index.

Gross state aid went from $152,000 in FY2006 to $278,000 in FY2025, +82.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+534.3%** $7,678 to $49,000 · all towns +54.0%	All fixed costs, FY2016–25 **+63.8%** $119,000 to $196,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, New Braintree's health insurance would have been $9,589 in FY2025; it was $49,000, $39,000 above the path. Its fixed costs would have been $149,000 in FY2025; it was $196,000, $47,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (–43%), FY2019 (+78%) and FY2023 (+38%); health insurance changed by more than 30% in one year in FY2018 (+43%), FY2019 (+69%), FY2020 (–79%), FY2021 (+236%), FY2022 (+128%) and FY2023 (+111%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming New Braintree came to $290,000, 7.1 times the $41,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$290,000	7.1 times	28.2%
Placed in the town	$290,000	7.1 times	42.3%
Everything placed	$290,000	7.1 times	45.2%

SCHOOLS

New Braintree's required school contribution is 3.1% of median household income, 44th highest of 351.

Chapter 70 aid, FY2026 **$822,000** attributed to the town	Required local contribution **$1.2M** FY2026
Share of household income **3.1%** 44th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

New Braintree has no school district of its own. Its pupils attend Quabbin and Pathfinder; New Braintree accounts for 6% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

New Braintree received $1.5 million in earmarks placed in the town and competitive grants over ten years, 46% of the $3.4 million its size, need and institutions predict.

PEERS

New Braintree ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
New Braintree this town	**55**	**$17,191**	**$1,081**	**$298**	**1.25**	**3.1%**
Petersham peer · lowest in class of 30	56	$19,509	$612	$0	0.99	2.7%
Florida peer	64	$19,543	$1,744	$0	0.14	3.2%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%
Heath peer	70	$20,313	$6,568	$65.36	0.84	1.5%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

New Marlborough

Town · Berkshire County · 1,501 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Southern Berkshire Regional School District, shared with Alford, Egremont, Monterey and Sheffield

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

New Marlborough scores 49 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100
135th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	63	42	44

Rank under other weightings: 113th to 155th.

Near fair: between 45 and 55 under every weighting

New Marlborough received less than its share of state aid on three of four measures; its blended score of 49 stays between 45 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100
28th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
95	97	89	95

Rank under other weightings: 24th to 31st.

Stable high: above 55 under every weighting

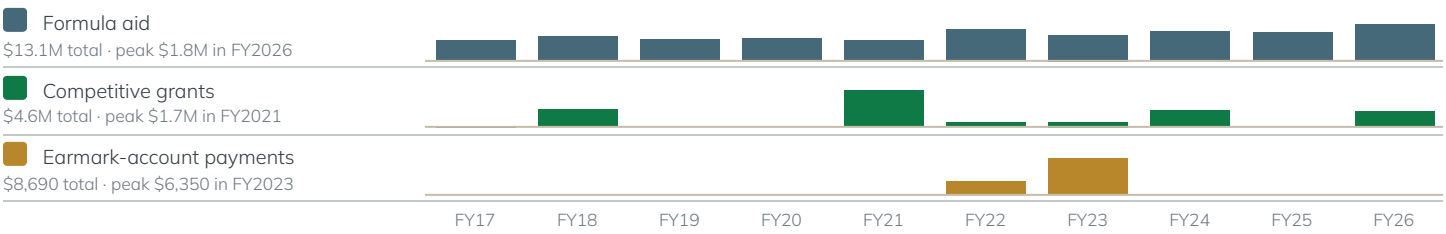
New Marlborough received more than its share of discretionary money on all four measures; its blended score of 94 stays between 93 and 95 under every weighting tested.

STATE MONEY, FY2017–FY2026

New Marlborough's town government and school districts received $13.1 million in formula aid and $4.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$13.1M	$4.6M	$8,690
$8,719 per resident (229th of 351) · gross	$3,098 per resident (31st of 351)	$5.79 per resident (281st of 351)

Competitive grants to New Marlborough peaked in FY2021 at $1.7 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

No local earmark was placed in New Marlborough in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $8,690 in payments to New Marlborough's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in New Marlborough.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: New Marlborough's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Chilmark	$0	$0	$0	$0
Monterey	$0	$0	$0	$0
Otis	$0	$0	$0	$0
Truro	$72,000	$222,000	$222,000	$130
Aquinnah	$100,000	$100,000	$100,000	$150

WHAT THE TOWN CARRIES

Measured against what it maintains, New Marlborough received 2.06 times its proportional share of competitive grant awards.

Local road miles **83.5** 145th of 351 · 55.6 per 1,000 residents (18th of 351)	Town-owned bridges, replacement cost **$25.9M** scored exposure $6M · four in poor condition	Road-stream crossings **110** 98th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **46.9 sq mi** 12% state-owned	Seasonal homes **37%** share of housing units	Peak service population **2,432** residents plus seasonal	Core infrastructure index **0.15** roads, culverts, dams, coast, flood, energy

Burden index 2.06; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,266 acres** 10.9% of land area · FY2026	State-owned land PILOT, FY2026 **$80,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$24.54** statewide $117 · FY2026	New growth per resident **$44,485** FY2017–2025 · 47th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.6% of New Marlborough's general-fund spending in FY2025, down from 2.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.9%** $94,000 of $3.2M · median town 14.1%	FY2016 **2.4%** $116,000 of $4.8M · median town 12.2%	FY2025 **2.6%** $162,000 of $6.3M · median town 11.5%	Net of state charges, FY2025 **1.5%** FY2010: 3.2% · median town 10.0%

New Marlborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $369,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

New Marlborough's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 11.5% above its FY2006 aid grown by Boston-area consumer prices and 0.9% below grown by the government price index.

Gross state aid went from $94,000 in FY2006 to $162,000 in FY2025, +72.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+28.7%** $143,000 to $185,000 · all towns +54.0%	All fixed costs, FY2016–25 **+36.7%** $356,000 to $486,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, New Marlborough's health insurance would have been $179,000 in FY2025; it was $185,000, $5,522 above the path. Its fixed costs would have been $444,000 in FY2025; it was $486,000, $42,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming New Marlborough came to $0, 0.0% of the $41,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

New Marlborough's required school contribution is 2.0% of median household income, 306th highest of 351.

Chapter 70 aid, FY2026 **$406,000** attributed to the town	Required local contribution **$1.4M** FY2026
Share of household income **2.0%** 306th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+26%** after inflation

New Marlborough has no school district of its own. Its pupils attend Southern Berkshire; New Marlborough accounts for 18% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

New Marlborough received $5.2 million in earmarks placed in the town and competitive grants over ten years, 40% more than the $3.7 million its size, need and institutions predict.

PEERS

New Marlborough is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
New Marlborough this town	**49**	**$8,719**	**$3,098**	**$0**	**2.06**	**2.0%**
Chilmark peer · lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Otis peer	43	$6,679	$2,109	$0	1.01	2.2%
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

New Salem

Town · Franklin County · 1,054 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Hampden · Aaron L. Saunders

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

New Salem-Wendell Regional School District, shared with Wendell
Ralph C Mahar Regional School District, shared with Orange, Petersham and Wendell
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

New Salem scores 55 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

84th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	58	41	55

Rank under other weightings: 55th to 109th.

Weighting-dependent: the range crosses the 45–55 band

New Salem received more than its share of state aid on three of four measures; its blended score of 55 stays between 51 and 59 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100

53rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
90	87	83	85

Rank under other weightings: 49th to 57th.

Stable high: above 55 under every weighting

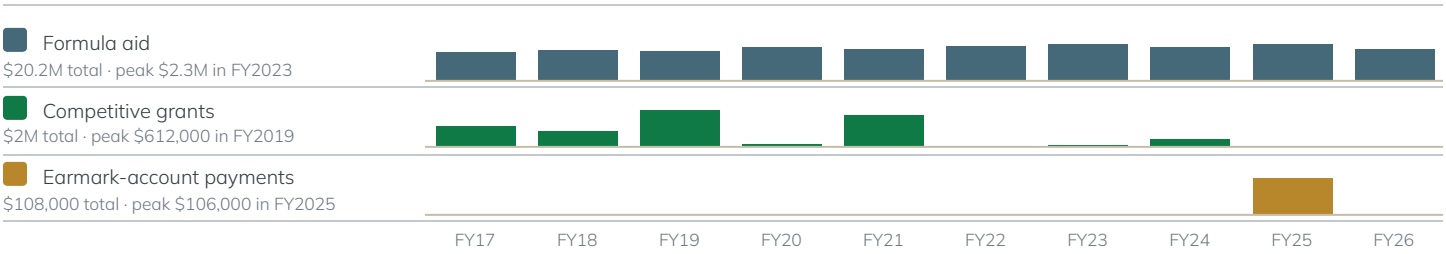
New Salem received more than its share of discretionary money on all four measures; its blended score of 86 stays between 85 and 88 under every weighting tested.

STATE MONEY, FY2017–FY2026

New Salem's town government and school districts received $20.2 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$20.2M	**$2M**	**$108,000**
$19,167 per resident (32nd of 351) · gross	$1,900 per resident (49th of 351)	$102 per resident (21st of 351)

Competitive grants to New Salem peaked in FY2019 at $612,000, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

New Salem received $106,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$106,000	**$106,000**	**$106,000**	**Not a member**
$101 per resident (49th of 351)	$101 per resident (67th of 351)	$101 per resident (76th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2025. Every one names New Salem directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$106,000	"improvements to the Swift River elementary school in the town of New Salem"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, New Salem received 36% of its proportional share of competitive grant awards.

Local road miles **35.3** 311th of 351 · 33.5 per 1,000 residents (38th of 351)	Town-owned bridges, replacement cost **$2.3M** scored exposure $989,000 · one in poor condition	Road-stream crossings **97** 123rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **44.8 sq mi** 59% state-owned	Seasonal homes **4%** share of housing units	Peak service population **1,100** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **219 acres** 0.8% of land area · FY2026	State-owned land PILOT, FY2026 **$19,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$84.65** statewide $117 · FY2026	New growth per resident **$10,552** FY2017–2025 · 312th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.9% of New Salem's general-fund spending in FY2025, down from 8.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.3%** $158,000 of $1.9M · median town 14.1%	FY2016 **7.6%** $208,000 of $2.7M · median town 12.2%	FY2025 **6.9%** $278,000 of $4M · median town 11.5%	Net of state charges, FY2025 **6.9%** FY2010: 5.2% · median town 10.0%

New Salem's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $545,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

New Salem's state aid kept pace with both price measures: FY2025 aid was 13.6% above its FY2006 aid grown by Boston-area consumer prices and 0.9% above grown by the government price index.

Gross state aid went from $158,000 in FY2006 to $278,000 in FY2025, +76.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.7%** $57,000 to $76,000 · all towns +54.0%	All fixed costs, FY2016–25 **+10.3%** $140,000 to $154,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, New Salem's health insurance would have been $71,000 in FY2025; it was $76,000, $4,430 above the path. Its fixed costs would have been $175,000 in FY2025; it was $154,000, $20,000 below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming New Salem came to $106,000, 5.7 times the $19,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$106,000	5.7 times	28.2%
Placed in the town	$106,000	5.7 times	42.3%
Everything placed	$106,000	5.7 times	45.2%

SCHOOLS

New Salem's required school contribution is 2.6% of

EXPECTED AND ACTUAL

New Salem received $2.1 million in earmarks placed in the town and competitive grants over ten years,

median household income, 181st highest of 351.

Chapter 70 aid, FY2026 **$564,000** attributed to the town	Required local contribution **$913,000** FY2026
Share of household income **2.6%** 181st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

New Salem has no school district of its own. Its pupils attend New Salem-Wendell, Ralph C Mahar and Franklin County; New Salem accounts for 42%, 5% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

38% of the $5.5 million its size, need and institutions predict.

PEERS

New Salem ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
New Salem this town	**55**	**$19,167**	**$1,900**	**$101**	**0.36**	**2.6%**
Charlemont peer	64	$19,209	$6,110	$148	2.68	3.8%
Plainfield peer · lowest in class of 30	52	$15,369	$4,077	$0	1.79	4.5%
Granville peer	50	$11,112	$2,359	$0	0.73	2.8%
Royalston peer	59	$15,842	$2,316	$41.10	0.96	1.5%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Newbury

Town · Essex County · 6,777 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Essex · Kristin E. Kassner

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Triton Regional School District, shared with Rowley and Salisbury
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newburyport, Rowley and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Newbury scores 41 on the Fairness Index for all state aid and 46 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

204th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	52	38	40

Rank under other weightings: 176th to 228th.

Stable low: below 45 under every weighting

Newbury received less than its share of state aid on three of four measures; its blended score of 41 stays between 38 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

46 / 100

200th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	64	20	53

Rank under other weightings: 172nd to 226th.

Weighting-dependent: the range crosses the 45–55 band

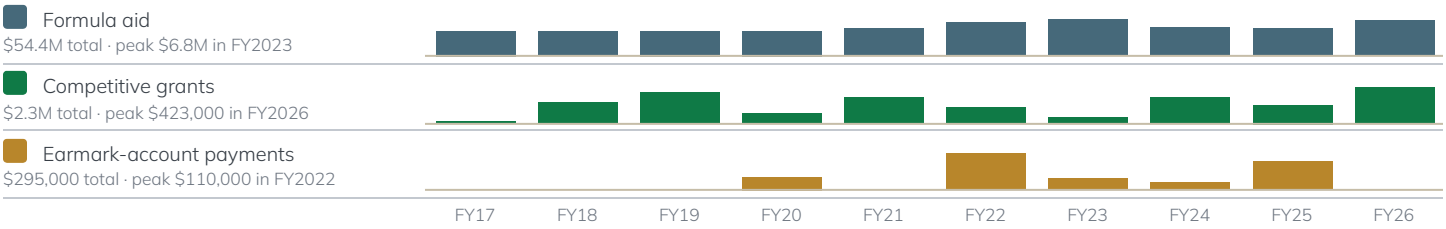
Newbury received less than its share of discretionary money on two of four measures; its blended score of 46 stays between 38 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Newbury's town government and school districts received $54.4 million in formula aid and $2.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$54.4M	$2.3M	$295,000
$8,033 per resident (254th of 351) · gross	$339 per resident (190th of 351)	$43.46 per resident (98th of 351)

Competitive grants to Newbury were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.9 million, are not shown.

EARMARKS

Newbury received $263,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$263,000	$263,000	$263,000	Not a member
$38.77 per resident (195th of 351)	$38.77 per resident (208th of 351)	$38.77 per resident (211th of 351)	35 municipalities had none

Placed in the town: ten clauses in seven of ten budgets; the most recent in FY2026. Every one names Newbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$40,000	"firefighter turnout gear in the town of Newbury"	Enacted names the town
FY2020	$40,000	"the town of Newbury for the development of bathroom and public safety facilities on town property located at 31 Plum Island Boulevard"	Enacted names the town
FY2023	$35,000	"the town of Newbury for the replacement of an all-terrain vehicle for emergency response issues on beaches and in woodlands"	Enacted names the town
FY2023	$25,000	"an accessible van for the council on aging in the town of Newbury"	Enacted names the town
FY2021	$23,000 (split 11 ways)	"equally to the city of Gloucester and the towns of Boxford, Essex, Georgetown, Groveland, Hamilton, Ipswich, Manchester-by-the-Sea, Middleton…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Newbury received 19% of its proportional share of competitive grant awards.

Local road miles **52.7** 239th of 351 · 7.8 per 1,000 residents (141st of 351)	Town-owned bridges, replacement cost **$14.4M** scored exposure $2.9M · one in poor condition	Road-stream crossings **100** 116th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **23.4 sq mi** 21% state-owned	Seasonal homes **7%** share of housing units	Peak service population **7,294** residents plus seasonal	Core infrastructure index **0.08** roads, culverts, dams, coast, flood, energy

Burden index 0.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,121 acres** 20.9% of land area · FY2026	State-owned land PILOT, FY2026 **$607,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$194** statewide $117 · FY2026	New growth per resident **$27,850** FY2017–2025 · 118th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.1% of Newbury's general-fund spending in FY2025, down from 8.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.7%** $1.3M of $14.6M · median town 14.1%	FY2016 **4.6%** $823,000 of $17.9M · median town 12.2%	FY2025 **5.1%** $1.3M of $25.1M · median town 11.5%	Net of state charges, FY2025 **4.4%** FY2010: 6.7% · median town 10.0%

Newbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Newbury's state aid did not keep pace with either price measure: FY2025 aid was 34.9% below its FY2006 aid grown by Boston-area consumer prices and 42.1% below grown by the government price index.

Gross state aid went from $1.3 million in FY2006 to $1.3 million in FY2025, +1.0% in dollars. Flag: in FY2010, $658,000 of Newbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.0%** $677,000 to $975,000 · all towns +54.0%	All fixed costs, FY2016–25 **+75.9%** $1.2M to $2.1M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Newbury's health insurance would have been $845,000 in FY2025; it was $975,000, $130,000 above the path. Its fixed costs would have been $1.52 million in FY2025; it was $2.15 million, $622,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (+43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Newbury came to $223,000, 74.7% of the $298,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$223,000	74.7%	28.2%
Placed in the town	$223,000	74.7%	42.3%
Everything placed	$223,000	74.7%	45.2%

SCHOOLS

Newbury's required school contribution is 1.6% of median household income, 333rd highest of 351.

Chapter 70 aid, FY2026 **$2.9M** attributed to the town	Required local contribution **$7.6M** FY2026
Share of household income **1.6%** 333rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Newbury has no school district of its own. Its pupils attend Newbury, Triton and Whittier; Newbury accounts for 100%, 29% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Newbury received $2.6 million in earmarks placed in the town and competitive grants over ten years, about the $2.6 million its size, need and institutions predict.

PEERS

Newbury ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Newbury this town	**41**	**$8,033**	**$339**	**$38.77**	**0.19**	**1.6%**
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Newburyport

City · Essex County · 18,652 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Essex · Dawne Shand

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Newburyport Public Schools, the city's own district
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Rowley and two others

REGIONAL PLANNING AGENCY
Merrimack Valley Planning Commission

FAIRNESS INDEX

Newburyport scores 33 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

283rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	43	32	28

Rank under other weightings: 273rd to 290th.

Stable low: below 45 under every weighting

Newburyport received less than its share of state aid on all four measures; its blended score of 33 stays between 30 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100

143rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	71	55	55

Rank under other weightings: 137th to 151st.

Stable high: above 55 under every weighting

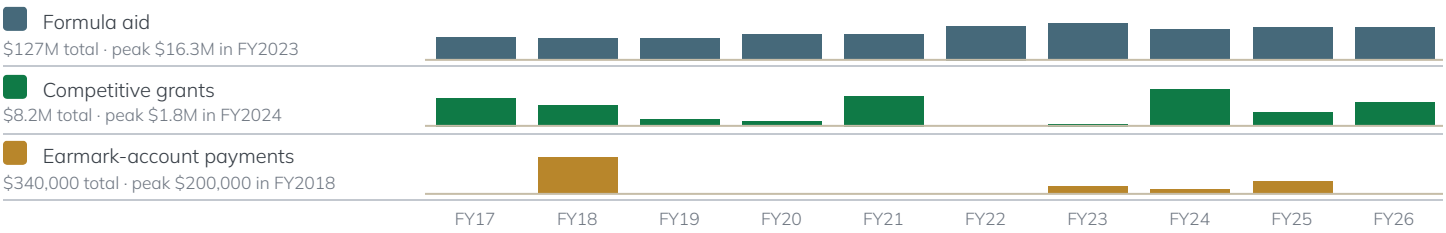
Newburyport received more than its share of discretionary money on all four measures; its blended score of 59 stays between 57 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Newburyport's town government and school districts received $127 million in formula aid and $8.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$127M	**$8.2M**	**$340,000**
$6,797 per resident (302nd of 351) · gross	$442 per resident (154th of 351)	$18.22 per resident (214th of 351)

Competitive grants to Newburyport peaked in FY2024 at $1.8 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $25.9 million, are not shown.

EARMARKS

Newburyport received $1.1 million in local earmarks naming the town, $1.4 million placed in the town and $1.4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$1.4M**	**$1.4M**	**Not a member**
$58.62 per resident (122nd of 351)	$77.12 per resident (102nd of 351)	$77.12 per resident (108th of 351)	35 municipalities had none

Placed in the town: 29 clauses in ten of ten budgets; the most recent in FY2026. $1.1 million came in clauses that name Newburyport; the other $345,000 went to organizations based in Newburyport, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$250,000	"the city of Newburyport for the purchase, installation and related costs, including engineering and design work, for a new landfill gas flare system..."	Enacted names the town
FY2018	$200,000	"the city of Newburyport for the purchase, installation and related costs, such as engineering and design work, for a new landfill gas flare system at..."	Enacted names the town
FY2026	$125,000	"C-10 Research and Education Foundation, Inc. to provide radiological monitoring in the 6 communities of the commonwealth that are within the plume..."	Enacted recipient based here
FY2025	$120,000	"the C-10 Research and Education Foundation, Inc. to provide radiological monitoring in the 6 communities of the commonwealth that are within the..."	Enacted recipient based here
FY2022	$100,000	"the C-10 Research and Education Foundation, Inc. to provide radiological monitoring in the 6 communities of the commonwealth that are within the..."	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Newburyport received 78% of its proportional share of competitive grant awards.

Local road miles **68.6** 195th of 351 · 3.7 per 1,000 residents (293rd of 351)	Town-owned bridges, replacement cost **$344,000** scored exposure $206,000 · none in poor condition	Road-stream crossings **37** 302nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **8.4 sq mi** 10% state-owned	Seasonal homes **2%** share of housing units	Peak service population **19,099** residents plus seasonal	Core infrastructure index **1.85** roads, culverts, dams, coast, flood, energy

Burden index 0.78; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **438 acres** 8.2% of land area · FY2026	State-owned land PILOT, FY2026 **$248,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$566** statewide $117 · FY2026	New growth per resident **$34,203** FY2017–2025 · 85th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.5% of Newburyport's general-fund spending in FY2025, down from 17.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.4%** $7.9M of $45.2M · median town 14.1%	FY2016 **12.2%** $7.4M of $60.8M · median town 12.2%	FY2025 **11.5%** $10.3M of $89.3M · median town 11.5%	Net of state charges, FY2025 **9.1%** FY2010: 9.8% · median town 10.0%

Newburyport's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $122,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Newburyport's state aid did not keep pace with either price measure: FY2025 aid was 15.3% below its FY2006 aid grown by Boston-area consumer prices and 24.8% below grown by the government price index.

Gross state aid went from $7.9 million in FY2006 to $10.3 million in FY2025, +31.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+43.5%** $7.7M to $11M · all towns +54.0%	All fixed costs, FY2016–25 **+45.3%** $11.4M to $16.6M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Newburyport's health insurance would have been $9.60 million in FY2025; it was $11 million, $1.43 million above the path. Its fixed costs would have been $14.3 million in FY2025; it was $16.6 million, $2.33 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Newburyport came to $1 million, 30.5% of the $3.34 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1M	30.5%	28.2%
Placed in the town	$1.2M	37.0%	42.3%
Everything placed	$1.2M	37.0%	45.2%

SCHOOLS

Newburyport's required school contribution is 2.0% of median household income, 309th highest of 351.

Chapter 70 aid, FY2026 **$6.3M** to the town's district	Required local contribution **$22.7M** FY2026
Share of household income **2.0%** 309th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+39%** after inflation

Newburyport runs its own school district and also belongs to Whittier; Newburyport accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

Newburyport received $10.1 million in earmarks placed in the town and competitive grants over ten years, 90% of the $11.3 million its size, need and institutions predict.

PEERS

Newburyport ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Newburyport this town	**33**	**$6,797**	**$442**	**$77.12**	**0.78**	**2.0%**
Ipswich peer	28	$6,449	$237	$49.75	0.55	2.3%
Lynnfield peer	30	$7,167	$206	$147	0.81	3.0%
Wakefield peer	28	$6,465	$157	$45.34	0.56	2.6%
Bedford peer	42	$9,879	$313	$18.33	0.99	2.9%
Canton peer	29	$6,511	$84.68	$52.89	0.29	2.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Harvard lowest in class of 30	39	$8,662	$563	$18.05	0.96	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Newton

City · Middlesex County · 89,044 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Middlesex · Amy Mah Sangiolo 50% of residents
12th Middlesex · Greg Schwartz 41% of residents
10th Middlesex · John J. Lawn, Jr. 10% of residents

Newton is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk and Middlesex · Cynthia Stone Creem

SCHOOL DISTRICTS

Newton Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Newton scores 27 on the Fairness Index for all state aid and 14 for discretionary money. Fifty is a fair share.

ALL STATE AID

27 / 100

338th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	40	23	21

Rank under other weightings: 322nd to 344th.

Stable low: below 45 under every weighting

Newton received less than its share of state aid on all four measures; its blended score of 27 stays between 24 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

14 / 100

334th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
11	23	13	10

Rank under other weightings: 331st to 338th.

Stable low: below 45 under every weighting

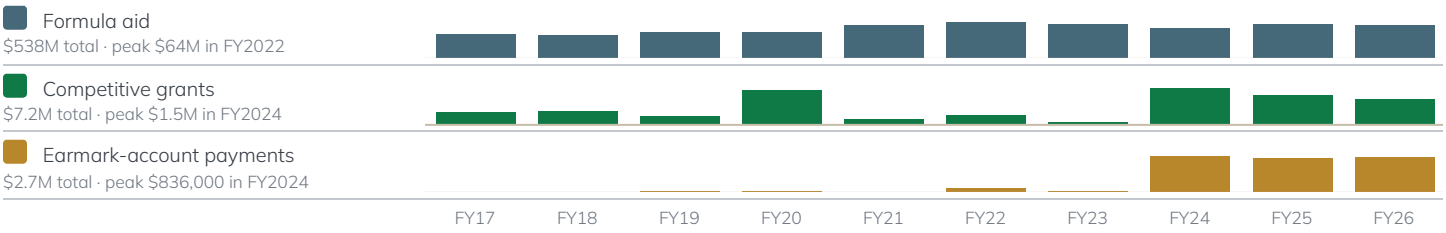
Newton received less than its share of discretionary money on all four measures; its blended score of 14 stays between 12 and 16 under every weighting tested.

STATE MONEY, FY2017–FY2026

Newton's town government and school districts received $538 million in formula aid and $7.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$538M	$7.2M	$2.7M
$6,038 per resident (335th of 351) · gross	$80.63 per resident (337th of 351)	$30.23 per resident (147th of 351)

Competitive grants to Newton peaked in FY2024 at $1.5 million, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $62.1 million, are not shown.

EARMARKS

Newton received $3.2 million in local earmarks naming the town, $3.9 million placed in the town and $4 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.2M	$3.9M	$4M	Not a member
$35.59 per resident (208th of 351)	$44.01 per resident (186th of 351)	$44.58 per resident (187th of 351)	35 municipalities had none

Placed in the town: 73 clauses in ten of ten budgets; the most recent in FY2026. $3.1 million came in clauses that name Newton; the other $800,000 went to organizations based in Newton, some of which serve a wider area.

Names the town includes $50,000 in clauses that name Newton but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Newton (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"Friends of Coletti-Magni Park, Inc. for the revitalization of Coletti-Magni park in the Nonantum neighborhood of Newton"	Enacted names the town
FY2024	$150,000	"the department of parks, recreation and culture in the city of Newton"	Enacted names the town
FY2026	$100,000	"capital improvements of the American Legion Post 440 in the Nonantum neighborhood of the city of Newton"	Enacted names the town
FY2025	$100,000	"the department of parks, recreation and culture in the city of Newton for the construction of the Crystal lake stormwater filtration basin to..."	Enacted names the town
FY2024	$100,000	"improvements to Farlow park, including the Chaffin house property and the Farlow pond in the city of Newton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Newton received 54% of its proportional share of competitive grant awards.

Local road miles **277.9** 5th of 351 · 3.1 per 1,000 residents (312th of 351)	Town-owned bridges, replacement cost **$20.2M** scored exposure $4.8M · none in poor condition	Road-stream crossings **93** 133rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.8 sq mi** 3% state-owned	Seasonal homes **1%** share of housing units	Peak service population **89,902** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.54; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$46,131** FY2017–2025 · 43rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.9% of Newton's general-fund spending in FY2025, down from 7.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.8%** $22M of $283M · median town 14.1%	FY2016 **7.2%** $26.1M of $361M · median town 12.2%	FY2025 **6.9%** $36.4M of $530M · median town 11.5%	Net of state charges, FY2025 **5.5%** FY2010: 6.2% · median town 10.0%

Newton's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 6.5% above its FY2006 aid grown by Boston-area consumer prices and 5.4% below grown by the government price index.

Gross state aid went from $22 million in FY2006 to $36.4 million in FY2025, +65.2% in dollars. Flag: in FY2010, $4.1 million of Newton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.6%** $65.4M to $86.7M · all towns +54.0%	All fixed costs, FY2016–25 **+55.8%** $77.1M to $120M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Newton's health insurance would have been $81.6 million in FY2025; it was $86.7 million, $5.02 million above the path. Its fixed costs would have been $96.3 million in FY2025; it was $120 million, $23.8 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Newton came to $2.6 million, 12.1% of the $21.3 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.6M	12.1%	28.2%
Placed in the town	$3.3M	15.4%	42.3%
Everything placed	$3.3M	15.6%	45.2%

SCHOOLS

Newton's required school contribution is 2.2% of median household income, 288th highest of 351.

Chapter 70 aid, FY2026 **$30.4M** to the town's district	Required local contribution **$135M** FY2026
Share of household income **2.2%** 288th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

Newton runs its own school district.

EXPECTED AND ACTUAL

Newton received $19.5 million in earmarks placed in the town and competitive grants over ten years, about the $20.3 million its size, need and institutions predict.

PEERS

Newton ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Newton this town	**27**	**$6,038**	**$80.63**	**$44.01**	**0.54**	**2.2%**
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Andover peer	28	$6,322	$94.07	$42.90	0.79	2.8%
Needham peer	28	$6,664	$33.58	$150	0.21	2.5%
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Norfolk

Town · Norfolk County · 11,673 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
9th Norfolk · Marcus S. Vaughn

STATE SENATE
Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS
Norfolk Public Schools, the town's own district
King Philip Regional School District, shared with Plainville and Wrentham
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, North Attleborough, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Norfolk scores 38 on the Fairness Index for all state aid and 43 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

234th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	56	31	30

Rank under other weightings: 202nd to 252nd.

Stable low: below 45 under every weighting

Norfolk received less than its share of state aid on three of four measures; its blended score of 38 stays between 34 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

43 / 100

211th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	58	43	33

Rank under other weightings: 198th to 224th.

Weighting-dependent: the range crosses the 45–55 band

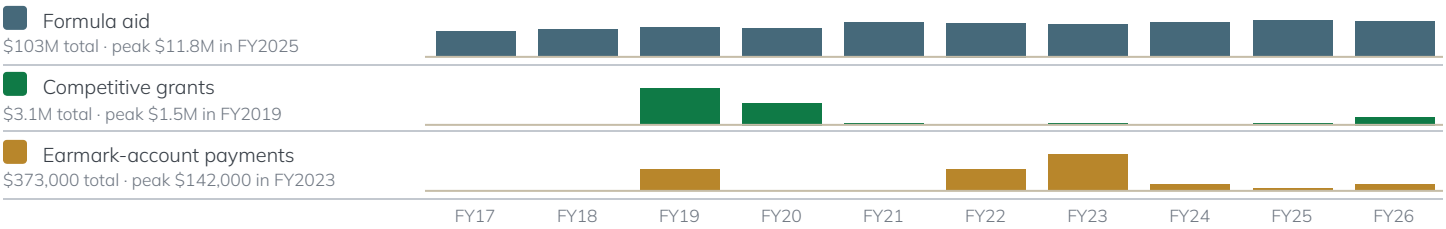
Norfolk received less than its share of discretionary money on three of four measures; its blended score of 43 stays between 39 and 48 under every weighting tested.

STATE MONEY, FY2017–FY2026

Norfolk's town government and school districts received $103 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$103M	$3.1M	$373,000
$8,835 per resident (225th of 351) · gross	$264 per resident (223rd of 351)	$31.94 per resident (141st of 351)

Competitive grants to Norfolk peaked in FY2019 at $1.5 million, 50% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7 million, are not shown.

EARMARKS

Norfolk received $629,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$629,000	$629,000	$629,000	Not a member
$53.87 per resident (136th of 351)	$53.87 per resident (159th of 351)	$53.87 per resident (163rd of 351)	35 municipalities had none

Placed in the town: 18 clauses in ten of ten budgets; the most recent in FY2026. Every one names Norfolk directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$125,000	"improvements to the H. Olive Day School in the town of Norfolk"	Enacted names the town
FY2018	$100,000	"repairs and replacement of the roof of the H. Olive Day elementary school in the town of Norfolk"	Enacted names the town
FY2025	$50,000	"the repair and expansion of the council on aging parking lot in the town of Norfolk"	Enacted names the town
FY2019	$50,000	"engineering improvements to the City Mills dam in the town of Norfolk"	Enacted names the town
FY2024	$45,000	"radio repeater system upgrades in the fire department in the town of Norfolk"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Norfolk received 87% of its proportional share of competitive grant awards.

Local road miles **77.0** 168th of 351 · 6.6 per 1,000 residents (171st of 351)	Town-owned bridges, replacement cost **$4.6M** scored exposure $595,000 · none in poor condition	Road-stream crossings **58** 234th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **14.9 sq mi** 9% state-owned	Seasonal homes **1%** share of housing units	Peak service population **11,823** residents plus seasonal	Core infrastructure index **0.69** roads, culverts, dams, coast, flood, energy

Burden index 0.87; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,113 acres** 11.7% of land area · FY2026	State-owned land PILOT, FY2026 **$389,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$349** statewide $117 · FY2026	New growth per resident **$29,061** FY2017–2025 · 112th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.9% of Norfolk's general-fund spending in FY2025, down from 18.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.9%** $5M of $26.5M · median town 14.1%	FY2016 **12.2%** $4.5M of $36.4M · median town 12.2%	FY2025 **9.9%** $5.5M of $55.1M · median town 11.5%	Net of state charges, FY2025 **8.6%** FY2010: 15.4% · median town 10.0%

Norfolk's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Norfolk's state aid did not keep pace with either price measure: FY2025 aid was 29.6% below its FY2006 aid grown by Boston-area consumer prices and 37.4% below grown by the government price index.

Gross state aid went from $5 million in FY2006 to $5.5 million in FY2025, +9.2% in dollars. Flag: in FY2010, $325,000 of Norfolk's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.0%** $2.3M to $3.1M · all towns +54.0%	All fixed costs, FY2016–25 **+53.5%** $4.4M to $6.7M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Norfolk's health insurance would have been $2.87 million in FY2025; it was $3.08 million, $208,000 above the path. Its fixed costs would have been $5.44 million in FY2025; it was $6.68 million, $1.24 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Norfolk came to $554,000, 71.0% of the $780,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$554,000	71.0%	28.2%
Placed in the town	$554,000	71.0%	42.3%
Everything placed	$554,000	71.0%	45.2%

SCHOOLS

Norfolk's required school contribution is 2.7% of median household income, 153rd highest of 351.

Chapter 70 aid, FY2026 **$7.2M** to the town's district	Required local contribution **$18.9M** FY2026
Share of household income **2.7%** 153rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

Norfolk runs its own district for some grades and belongs to King Philip, Tri County and Norfolk County for others; Norfolk accounts for 35%, 5% and 5% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Norfolk received $3.7 million in earmarks placed in the town and competitive grants over ten years, about the $3.7 million its size, need and institutions predict.

PEERS

Norfolk ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Norfolk this town	**38**	**$8,835**	**$264**	**$53.87**	**0.87**	**2.7%**
Holliston peer	41	$9,911	$189	$129	0.85	3.1%
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Medway peer · best in class of 30	49	$11,769	$234	$182	1.08	2.8%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

North Adams

City · Berkshire County · 12,606 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Berkshire · John Barrett, III

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

North Adams Public Schools, the city's own district

Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Florida, Lanesborough, Monroe, Savoy and Williamstown

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

North Adams scores 72 on the Fairness Index for all state aid and 93 for discretionary money. Fifty is a fair share.

ALL STATE AID

72 / 100

11th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	61	74	80

Rank under other weightings: 6th to 14th.

Stable high: above 55 under every weighting

North Adams received more than its share of state aid on all four measures; its blended score of 72 stays between 68 and 75 under every weighting tested.

DISCRETIONARY MONEY ONLY

93 / 100

32nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	90	92	96

Rank under other weightings: 26th to 38th.

Stable high: above 55 under every weighting

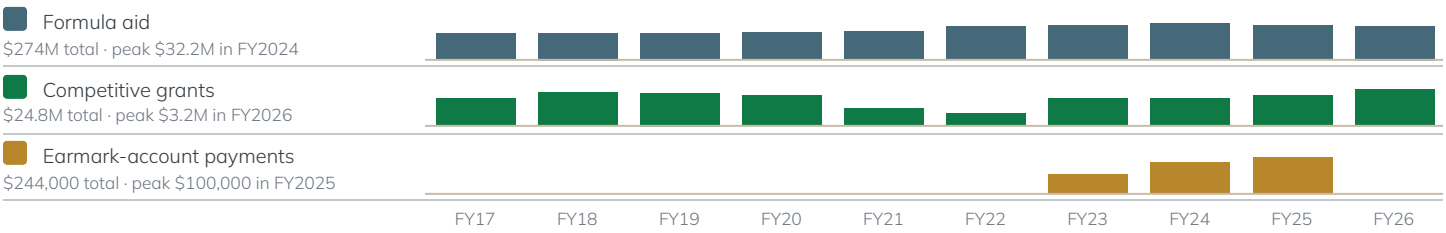
North Adams received more than its share of discretionary money on all four measures; its blended score of 93 stays between 92 and 94 under every weighting tested.

STATE MONEY, FY2017–FY2026

North Adams's town government and school districts received $274 million in formula aid and $24.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$274M	**$24.8M**	**$244,000**
$21,747 per resident (20th of 351) · gross	$1,967 per resident (48th of 351)	$19.38 per resident (206th of 351)

Competitive grants to North Adams were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $31.1 million, are not shown.

EARMARKS

North Adams received $6.4 million in local earmarks naming the town, $412,000 placed in the town and $6.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$6.4M	**$412,000**	**$6.5M**	**Not a member**
$504 per resident (2nd of 351)	$32.72 per resident (227th of 351)	$512 per resident (4th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2025. Every one names North Adams directly.

Names the town includes $5.9 million in clauses that name North Adams but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $6 million in three clauses for state facilities located in North Adams (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"repairs for the Northern Berkshire YMCA complex located in the city of North Adams"	Enacted names the town
FY2023	$75,000	"the city of North Adams for repairs to the North Adams public library belvedere"	Enacted names the town
FY2023	$50,000	"the city of North Adams for emergency repairs to Building 5 at Heritage state park"	Enacted names the town
FY2020	$50,000	"the Northern Berkshire Community Coalition, Inc. in the city of North Adams"	Enacted names the town
FY2019	$50,000	"the Northern Berkshire Community Coalition, Inc., in the city of North Adams"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, North Adams received 3.15 times its proportional share of competitive grant awards.

Local road miles **70.5** 187th of 351 · 5.6 per 1,000 residents (209th of 351)	Town-owned bridges, replacement cost **$73.4M** scored exposure $51.4M · two in poor condition	Road-stream crossings **91** 138th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **20.3 sq mi** 17% state-owned	Seasonal homes **2%** share of housing units	Peak service population **12,832** residents plus seasonal	Core infrastructure index **1.08** roads, culverts, dams, coast, flood, energy

Burden index 3.15; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,200 acres** 16.9% of land area · FY2026	State-owned land PILOT, FY2026 **$139,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$63.15** statewide $117 · FY2026	New growth per resident **$5,820** FY2017–2025 · 349th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 43.3% of North Adams's general-fund spending in FY2025, down from 47.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **47.4%** $20.1M of $42.3M · median town 14.1%	FY2016 **46.7%** $18.7M of $40M · median town 12.2%	FY2025 **43.3%** $23.1M of $53.3M · median town 11.5%	Net of state charges, FY2025 **35.5%** FY2010: 42.0% · median town 10.0%

North Adams's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

North Adams's state aid did not keep pace with either price measure: FY2025 aid was 25.9% below its FY2006 aid grown by Boston-area consumer prices and 34.1% below grown by the government price index.

Gross state aid went from $20.1 million in FY2006 to $23.1 million in FY2025, +15.0% in dollars. Flag: in FY2010, $660,000 of North Adams's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.9%** $4.3M to $6.5M · all towns +54.0%	All fixed costs, FY2016–25 **+47.2%** $7.3M to $10.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, North Adams's health insurance would have been $5.36 million in FY2025; it was $6.52 million, $1.16 million above the path. Its fixed costs would have been $9.12 million in FY2025; it was $10.8 million, $1.63 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming North Adams came to $3.4 million, 152.1% of the $2.23 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.4M	152.1%	28.2%
Placed in the town	$412,000	18.5%	42.3%
Everything placed	$3.5M	156.5%	45.2%

SCHOOLS

North Adams's required school contribution is 2.5% of median household income, 234th highest of 351.

Chapter 70 aid, FY2026 **$19.3M** to the town's district	Required local contribution **$7M** FY2026
Share of household income **2.5%** 234th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

North Adams runs its own school district and also belongs to Northern Berkshire; North Adams accounts for 31% of that district's foundation budget.

EXPECTED AND ACTUAL

North Adams received $25.7 million in earmarks placed in the town and competitive grants over ten years, 24% more than the $20.7 million its size, need and institutions predict.

PEERS

North Adams ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
North Adams this town	**72**	**$21,747**	**$1,967**	**$32.72**	**3.15**	**2.5%**
Athol peer	68	$23,699	$853	$117	1.25	1.4%
Southbridge peer	68	$21,891	$992	$33.72	1.54	2.3%
Adams peer	64	$19,320	$1,327	$27.87	2.22	2.2%
Orange peer	66	$23,109	$1,214	$123	2.59	3.0%
Gardner peer	60	$17,461	$784	$85.79	2.19	2.3%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

North Andover

Town · Essex County · 31,490 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Essex · Adrianne Pusateri Ramos 75% of residents

18th Essex · Tram T. Nguyen 25% of residents

North Andover is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold 75% of residents

First Essex and Middlesex · Bruce E. Tarr 25% of residents

SCHOOL DISTRICTS

North Andover Public Schools, the town's own district

Greater Lawrence Regional Vocational Technical School District, vocational, shared with Andover, Lawrence and Methuen

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

North Andover scores 26 on the Fairness Index for all state aid and 32 for discretionary money. Fifty is a fair share.

ALL STATE AID

26 / 100

341st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	30	23	27

Rank under other weightings: 326th to 344th.

Stable low: below 45 under every weighting

North Andover received less than its share of state aid on all four measures; its blended score of 26 stays between 25 and 27 under every weighting tested.

DISCRETIONARY MONEY ONLY

32 / 100

262nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	34	31	31

Rank under other weightings: 255th to 268th.

Stable low: below 45 under every weighting

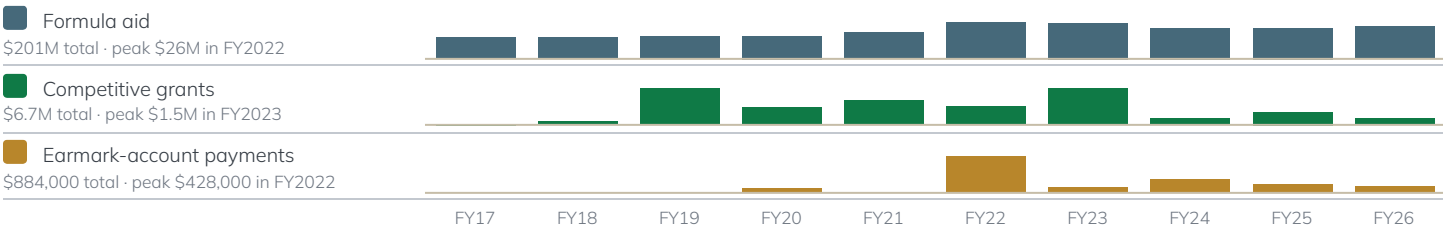
North Andover received less than its share of discretionary money on all four measures; its blended score of 32 stays between 31 and 32 under every weighting tested.

STATE MONEY, FY2017–FY2026

North Andover's town government and school districts received $201 million in formula aid and $6.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$201M	$6.7M	$884,000
$6,381 per resident (325th of 351) · gross	$213 per resident (246th of 351)	$28.07 per resident (155th of 351)

Competitive grants to North Andover peaked in FY2023 at $1.5 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.6 million, are not shown.

EARMARKS

North Andover received $999,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$999,000	$999,000	$999,000	Not a member
$31.72 per resident (221st of 351)	$31.72 per resident (233rd of 351)	$31.72 per resident (234th of 351)	35 municipalities had none

Placed in the town: 35 clauses in ten of ten budgets; the most recent in FY2026. Every one names North Andover directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$75,000	"the design, engineering and permitting of a boardwalk and trail connection for the Mills to Hills trail from Main street and around Osgood pond in…"	Enacted names the town
FY2023	$65,000	"the completion of the Vietnam Veterans memorial in North Andover"	Enacted names the town
FY2022	$65,000	"the Osgood Pond boardwalk and trail in the town of North Andover"	Enacted names the town
FY2025	$60,000	"North Andover for pedestrian safety measures"	Enacted names the town
FY2024	$55,000	"the town of North Andover for the construction of pickleball courts"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, North Andover received 89% of its proportional share of competitive grant awards.

Local road miles **117.7** 64th of 351 · 3.7 per 1,000 residents (289th of 351)	Town-owned bridges, replacement cost **$828,000** scored exposure $138,000 · none in poor condition	Road-stream crossings **131** 62nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.3 sq mi** 14% state-owned	Seasonal homes **1%** share of housing units	Peak service population **31,724** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.89; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,013 acres** 12.0% of land area · FY2026	State-owned land PILOT, FY2026 **$487,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$242** statewide $117 · FY2026	New growth per resident **$37,459** FY2017–2025 · 70th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.2% of North Andover's general-fund spending in FY2025, down from 12.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.6%** $8.7M of $69.2M · median town 14.1%	FY2016 **12.1%** $10.4M of $86M · median town 12.2%	FY2025 **12.2%** $15.7M of $128M · median town 11.5%	Net of state charges, FY2025 **11.6%** FY2010: 7.5% · median town 10.0%

North Andover's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $197,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

North Andover's state aid kept pace with both price measures: FY2025 aid was 15.8% above its FY2006 aid grown by Boston-area consumer prices and 2.9% above grown by the government price index.

Gross state aid went from $8.7 million in FY2006 to $15.7 million in FY2025, +79.5% in dollars. Flag: in FY2010, $412,000 of North Andover's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.8%** $9.2M to $13M · all towns +54.0%	All fixed costs, FY2016–25 **+44.4%** $15.3M to $22.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, North Andover's health insurance would have been $11.5 million in FY2025; it was $13 million, $1.46 million above the path. Its fixed costs would have been $19.2 million in FY2025; it was $22.1 million, $2.99 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming North Andover came to $880,000, 23.4% of the $3.76 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$880,000	23.4%	28.2%
Placed in the town	$880,000	23.4%	42.3%
Everything placed	$880,000	23.4%	45.2%

SCHOOLS

North Andover's required school contribution is 3.1% of median household income, 43rd highest of 351.

Chapter 70 aid, FY2026 **$13.3M** to the town's district	Required local contribution **$50.8M** FY2026
Share of household income **3.1%** 43rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+26%** after inflation

North Andover runs its own school district and also belongs to Greater Lawrence; North Andover accounts for 2% of that district's foundation budget.

EXPECTED AND ACTUAL

North Andover received $8.2 million in earmarks placed in the town and competitive grants over ten years, 9% more than the $7.5 million its size, need and institutions predict.

PEERS

North Andover ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
North Andover this town	**26**	**$6,381**	**$213**	**$31.72**	**0.89**	**3.1%**
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Sandwich peer	30	$7,257	$332	$24.72	0.71	2.7%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Watertown peer	28	$6,072	$161	$39.70	0.91	1.8%
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

North Attleborough

City · Bristol County · 30,984 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
14th Bristol · Adam J. Scanlon

STATE SENATE
Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS
North Attleborough Public Schools, the city's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, Plainville, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

North Attleborough scores 44 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

172nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	44	41	48

Rank under other weightings: 161st to 196th.

Weighting-dependent: the range crosses the 45–55 band

North Attleborough received less than its share of state aid on all four measures; its blended score of 44 stays between 42 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

284th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	25	28	27

Rank under other weightings: 274th to 299th.

Stable low: below 45 under every weighting

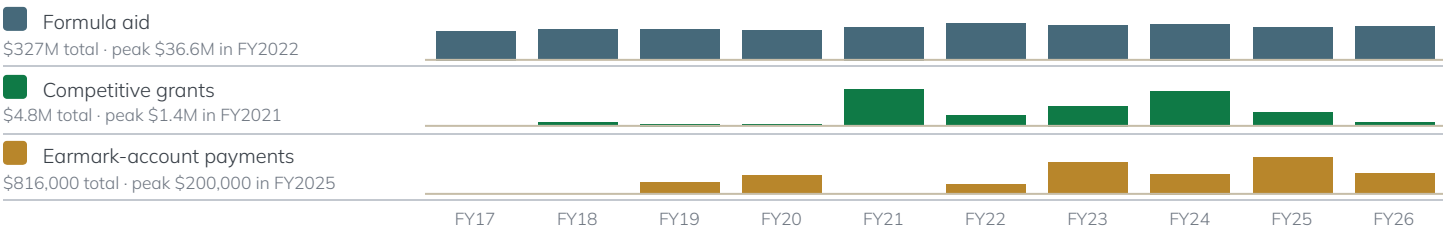
North Attleborough received less than its share of discretionary money on all four measures; its blended score of 26 stays between 24 and 27 under every weighting tested.

STATE MONEY, FY2017–FY2026

North Attleborough's town government and school districts received $327 million in formula aid and $4.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$327M	**$4.8M**	**$816,000**
$10,543 per resident (167th of 351) · gross	$156 per resident (284th of 351)	$26.34 per resident (166th of 351)

Competitive grants to North Attleborough peaked in FY2021 at $1.4 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20.2 million, are not shown.

EARMARKS

North Attleborough received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$1.2M**	**$1.2M**	**Not a member**
$39.34 per resident (193rd of 351)	$39.34 per resident (206th of 351)	$39.34 per resident (209th of 351)	35 municipalities had none

Placed in the town: 29 clauses in nine of ten budgets; the most recent in FY2026. Every one names North Attleborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the construction of a playground for the Roosevelt Avenue school in North Attleboro"	Enacted names the town
FY2022	$100,000	"the Greater Attleboro Area Council for Children, Incorporated for construction of a new site in the town of North Attleboro"	Enacted names the town
FY2018	$75,000	"establish a school resource officer position for North Attleboro public schools"	Enacted names the town
FY2025	$65,000	"the city known as the town of North Attleborough to purchase furniture, exercise equipment, movie projection equipment, a welcome desk and other…"	Enacted names the town
FY2024	$60,000	"Space2Thrive, Inc. to support the Volt Hockey program, acquisition of adaptive volt hockey wheelchairs and partnership with the Hockomock Area Young…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, North Attleborough received 1.28 times its proportional share of competitive grant awards.

Local road miles **120.7** 62nd of 351 · 3.9 per 1,000 residents (281st of 351)	Town-owned bridges, replacement cost **$14.4M** scored exposure $4.8M · two in poor condition	Road-stream crossings **116** 83rd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **18.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **30,984** residents plus seasonal	Core infrastructure index **0.66** roads, culverts, dams, coast, flood, energy

Burden index 1.28; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$12,584** FY2017–2025 · 283rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 24.3% of North Attleborough's general-fund spending in FY2025, down from 34.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **34.4%** $23.6M of $68.7M · median town 14.1%	FY2016 **31.2%** $24.8M of $79.3M · median town 12.2%	FY2025 **24.3%** $26.1M of $108M · median town 11.5%	Net of state charges, FY2025 **19.4%** FY2010: 31.2% · median town 10.0%

North Attleborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

North Attleborough's state aid did not keep pace with either price measure: FY2025 aid was 28.8% below its FY2006 aid grown by Boston-area consumer prices and 36.7% below grown by the government price index.

Gross state aid went from $23.6 million in FY2006 to $26.1 million in FY2025, +10.4% in dollars. Flag: in FY2010, $1.4 million of North Attleborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.8%** $8.6M to $13M · all towns +54.0%	All fixed costs, FY2016–25 **+45.4%** $12.6M to $18.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, North Attleborough's health insurance would have been $10.7 million in FY2025; it was $13 million, $2.30 million above the path. Its fixed costs would have been $15.7 million in FY2025; it was $18.3 million, $2.58 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming North Attleborough came to $1 million, 23.1% of the $4.43 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1M	23.1%	28.2%
Placed in the town	$1M	23.1%	42.3%
Everything placed	$1M	23.1%	45.2%

SCHOOLS

North Attleborough's required school contribution is 2.7% of median household income, 145th highest of 351.

Chapter 70 aid, FY2026 **$24.3M** to the town's district	Required local contribution **$40.2M** FY2026
Share of household income **2.7%** 145th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

North Attleborough runs its own school district and also belongs to Tri County and Bristol County; North Attleborough accounts for 25% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

North Attleborough received $6.2 million in earmarks placed in the town and competitive grants over ten years, 70% of the $8.8 million its size, need and institutions predict.

PEERS

North Attleborough ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
North Attleborough this town	**44**	**$10,543**	**$156**	**$39.34**	**1.28**	**2.7%**
Bridgewater peer	39	$9,702	$309	$21.78	1.08	3.0%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
East Longmeadow peer	42	$11,619	$224	$13.70	0.72	3.2%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

North Brookfield

Town · Worcester County · 4,760 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

North Brookfield Public Schools, the town's own district
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, Oxford, Paxton, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

North Brookfield scores 56 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

64th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	49	57	61

Rank under other weightings: 56th to 86th.

Weighting-dependent: the range crosses the 45–55 band

North Brookfield received more than its share of state aid on three of four measures; its blended score of 56 stays between 54 and 59 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

72nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
82	75	83	83

Rank under other weightings: 67th to 80th.

Stable high: above 55 under every weighting

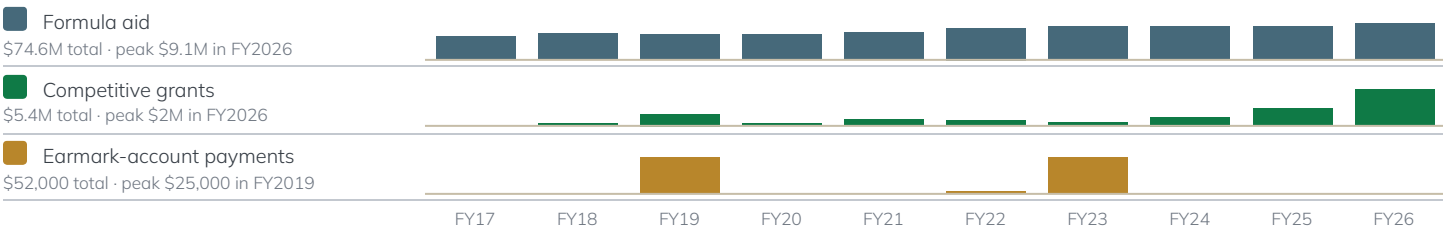
North Brookfield received more than its share of discretionary money on all four measures; its blended score of 81 stays between 79 and 82 under every weighting tested.

STATE MONEY, FY2017–FY2026

North Brookfield's town government and school districts received $74.6 million in formula aid and $5.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$74.6M	**$5.4M**	**$52,000**
$15,678 per resident (66th of 351) · gross	$1,128 per resident (71st of 351)	$10.92 per resident (254th of 351)

Competitive grants to North Brookfield peaked in FY2026 at $2 million, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.7 million, are not shown.

EARMARKS

North Brookfield received $35,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$35,000	**$35,000**	**$35,000**	**Not a member**
$7.35 per resident (302nd of 351)	$7.35 per resident (310th of 351)	$7.35 per resident (311th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2024. Every one names North Brookfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$25,000	"public safety improvements for the police department in North Brookfield"	Enacted names the town
FY2024	$10,000	"the North Brookfield town house"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, North Brookfield received 87% of its proportional share of competitive grant awards.

Local road miles **68.9** 193rd of 351 · 14.5 per 1,000 residents (74th of 351)	Town-owned bridges, replacement cost **$6.6M** scored exposure $2.2M · three in poor condition	Road-stream crossings **123** 72nd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **21.3 sq mi** 4% state-owned	Seasonal homes **1%** share of housing units	Peak service population **4,816** residents plus seasonal	Core infrastructure index **0.55** roads, culverts, dams, coast, flood, energy

Burden index 0.87; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **327 acres** 2.4% of land area · FY2026	State-owned land PILOT, FY2026 **$48,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$147** statewide $117 · FY2026	New growth per resident **$15,126** FY2017–2025 · 254th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 39.2% of North Brookfield's general-fund spending in FY2025, down from 52.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **52.5%** $5.6M of $10.7M · median town 14.1%	FY2016 **43.8%** $5.4M of $12.3M · median town 12.2%	FY2025 **39.2%** $6.4M of $16.4M · median town 11.5%	Net of state charges, FY2025 **29.8%** FY2010: 41.7% · median town 10.0%

North Brookfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $587,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

North Brookfield's state aid did not keep pace with either price measure: FY2025 aid was 25.8% below its FY2006 aid grown by Boston-area consumer prices and 34.1% below grown by the government price index.

Gross state aid went from $5.6 million in FY2006 to $6.4 million in FY2025, +15.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+2.3%** $1.7M to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+26.9%** $2.3M to $2.9M · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, North Brookfield's health insurance would have been $2.07 million in FY2025; it was $1.70 million, $375,000 below the path. Its fixed costs would have been $2.84 million in FY2025; it was $2.89 million, $46,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming North Brookfield came to $35,000, 92.4% of the $38,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$35,000	92.4%	28.2%
Placed in the town	$35,000	92.4%	42.3%
Everything placed	$35,000	92.4%	45.2%

SCHOOLS

North Brookfield's required school contribution is 2.9% of median household income, 112th highest of

EXPECTED AND ACTUAL

North Brookfield received $5.8 million in earmarks placed in the town and competitive grants over ten

351.

Chapter 70 aid, FY2026 **$5.7M** to the town's district	Required local contribution **$4.2M** FY2026
Share of household income **2.9%** 112th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−2%** after inflation

North Brookfield runs its own school district and also belongs to Southern Worcester; North Brookfield accounts for 4% of that district's foundation budget.

years, 21% more than the $4.8 million its size, need and institutions predict.

PEERS

North Brookfield ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
North Brookfield this town	**56**	**$15,678**	**$1,128**	**$7.35**	**0.87**	**2.9%**
Warren peer	67	$20,879	$1,969	$10.98	1.67	2.5%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Montague peer	55	$14,528	$1,282	$26.53	2.38	2.7%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Cheshire peer	55	$14,188	$1,187	$49.75	2.39	2.8%
Greenfield best in class of 30	53	$14,180	$1,705	$134	4.81	2.9%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

North Reading

Town · Middlesex County · 15,765 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

20th Middlesex · Bradley H. Jones, Jr.

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

North Reading Public Schools, the town's own district

Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, Reading, Revere, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

North Reading scores 38 on the Fairness Index for all state aid and 51 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

241st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	57	31	29

Rank under other weightings: 204th to 258th.

Stable low: below 45 under every weighting

North Reading received less than its share of state aid on three of four measures; its blended score of 38 stays between 33 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

51 / 100

184th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	69	45	41

Rank under other weightings: 163rd to 199th.

Weighting-dependent: the range crosses the 45–55 band

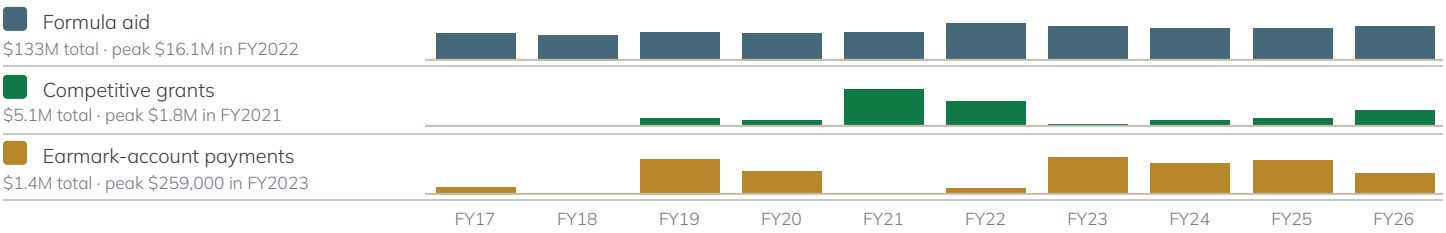
North Reading received less than its share of discretionary money on three of four measures; its blended score of 51 stays between 46 and 55 under every weighting tested.

STATE MONEY, FY2017–FY2026

North Reading's town government and school districts received $133 million in formula aid and $5.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$133M	$5.1M	$1.4M
$8,458 per resident (236th of 351) · gross	$326 per resident (200th of 351)	$86.72 per resident (31st of 351)

Competitive grants to North Reading peaked in FY2021 at $1.8 million, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.6 million, are not shown.

EARMARKS

North Reading received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$1.2M	$1.2M	Not a member
$76.44 per resident (77th of 351)	$76.44 per resident (104th of 351)	$76.44 per resident (110th of 351)	35 municipalities had none

Placed in the town: 28 clauses in nine of ten budgets; the most recent in FY2026. Every one names North Reading directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$175,000	"a child safety program in North Reading"	Enacted names the town
FY2020	$75,000	"the North Reading Public Schools' 1:1 Initiative school technology grant"	Enacted names the town
FY2020	$75,000	"a public safety grant in North Reading"	Enacted names the town
FY2019	$75,000	"the North Reading Public Schools' 1:1 Initiative school technology grant"	Enacted names the town
FY2026	$50,000	"security and software upgrades in the North Reading public schools"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, North Reading received 68% of its proportional share of competitive grant awards.

Local road miles **79.7** 158th of 351 · 5.1 per 1,000 residents (227th of 351)	Town-owned bridges, replacement cost **$9.3M** scored exposure $3.2M · two in poor condition	Road-stream crossings **47** 275th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.2 sq mi** 3% state-owned	Seasonal homes **1%** share of housing units	Peak service population **15,902** residents plus seasonal	Core infrastructure index **0.30** roads, culverts, dams, coast, flood, energy

Burden index 0.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **285 acres** 3.4% of land area · FY2026	State-owned land PILOT, FY2026 **$86,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$303** statewide $117 · FY2026	New growth per resident **$38,465** FY2017–2025 · 62nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.1% of North Reading's general-fund spending in FY2025, down from 17.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.6%** $6.8M of $38.8M · median town 14.1%	FY2016 **15.1%** $8.9M of $59.3M · median town 12.2%	FY2025 **12.1%** $10.2M of $84.1M · median town 11.5%	Net of state charges, FY2025 **11.9%** FY2010: 17.7% · median town 10.0%

North Reading's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $180,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

North Reading's state aid did not keep pace with either price measure: FY2025 aid was 3.4% below its FY2006 aid grown by Boston-area consumer prices and 14.2% below grown by the government price index.

Gross state aid went from $6.8 million in FY2006 to $10.2 million in FY2025, +49.8% in dollars. Flag: in FY2010, $713,000 of North Reading's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.7%** $5.2M to $8.1M · all towns +54.0%	All fixed costs, FY2016–25 **+59.4%** $9.6M to $15.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, North Reading's health insurance would have been $6.54 million in FY2025; it was $8.10 million, $1.56 million above the path. Its fixed costs would have been $12 million in FY2025; it was $15.3 million, $3.31 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming North Reading came to $1.1 million, 37.0% of the $2.86 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	37.0%	28.2%
Placed in the town	$1.1M	37.0%	42.3%
Everything placed	$1.1M	37.0%	45.2%

SCHOOLS

North Reading's required school contribution is 3.0% of median household income, 87th highest of 351.

Chapter 70 aid, FY2026 **$8.3M** to the town's district	Required local contribution **$25.5M** FY2026
Share of household income **3.0%** 87th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–5%** after inflation

North Reading runs its own school district and also belongs to Northeast Metropolitan; North Reading accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

North Reading received $6.4 million in earmarks placed in the town and competitive grants over ten years, 10% more than the $5.8 million its size, need and institutions predict.

PEERS

North Reading ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
North Reading this town	**38**	**$8,458**	**$326**	**$76.44**	**0.68**	**3.0%**
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Acton peer	40	$9,929	$351	$51.13	2.12	3.1%
Holliston peer	41	$9,911	$189	$129	0.85	3.1%
Northborough peer	35	$8,121	$93.72	$29.37	0.29	3.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Northampton

City · Hampshire County · 30,962 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampshire · Lindsay N. Sabadosa

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Northampton Public Schools, the city's own district

Northampton-Smith Vocational Agricultural School District, vocational

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Northampton scores 28 on the Fairness Index for all state aid and 61 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

326th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	21	37	26

Rank under other weightings: 279th to 343rd.

Stable low: below 45 under every weighting

Northampton received less than its share of state aid on all four measures; its blended score of 28 stays between 25 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

61 / 100

139th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	56	58	63

Rank under other weightings: 130th to 148th.

Stable high: above 55 under every weighting

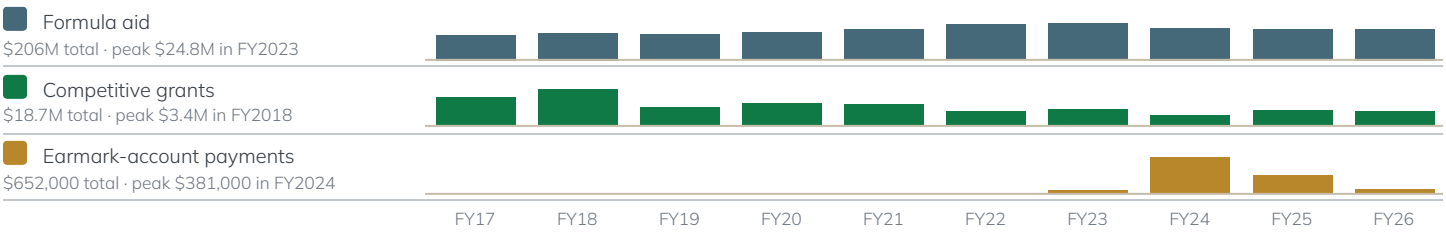
Northampton received more than its share of discretionary money on all four measures; its blended score of 61 stays between 58 and 63 under every weighting tested.

STATE MONEY, FY2017–FY2026

Northampton's town government and school districts received $206 million in formula aid and $18.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$206M	**$18.7M**	**$652,000**
$6,641 per resident (309th of 351) · gross	$603 per resident (122nd of 351)	$21.05 per resident (196th of 351)

Competitive grants to Northampton were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $59.1 million, are not shown.

EARMARKS

Northampton received $982,000 in local earmarks naming the town, $2.3 million placed in the town and $2.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$982,000	**$2.3M**	**$2.3M**	**Not a member**
$31.71 per resident (222nd of 351)	$73.53 per resident (106th of 351)	$73.53 per resident (113th of 351)	35 municipalities had none

Placed in the town: 33 clauses in ten of ten budgets; the most recent in FY2026. $982,000 came in clauses that name Northampton; the other $1.3 million went to organizations based in Northampton, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$150,000	"the city of Northampton for costs associated with a community care initiative"	Enacted names the town
FY2025	$136,000	"the Franklin and Hampshire county court-appointed special advocates program"	Enacted recipient based here
FY2024	$136,000	"the Franklin and Hampshire county court-appointed special advocates program"	Enacted recipient based here
FY2023	$136,000	"the Franklin and Hampshire County court-appointed special advocates program"	Enacted recipient based here
FY2022	$136,000	"the Franklin and Hampshire county court-appointed special advocates program"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Northampton received 1.28 times its proportional share of competitive grant awards.

Local road miles **154.7** 30th of 351 · 5.0 per 1,000 residents (233rd of 351)	Town-owned bridges, replacement cost **$39.3M** scored exposure $12.7M · four in poor condition	Road-stream crossings **184** 16th of 351 · culverts and small crossings	Town-owned hazard dams **7** high or significant hazard
Land area **34.2 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **31,043** residents plus seasonal	Core infrastructure index **1.30** roads, culverts, dams, coast, flood, energy

Burden index 1.28; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **347 acres** 1.6% of land area · FY2026	State-owned land PILOT, FY2026 **$166,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$478** statewide $117 · FY2026	New growth per resident **$16,938** FY2017–2025 · 229th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.4% of Northampton's general-fund spending in FY2025, down from 26.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **26.7%** $17.1M of $63.9M · median town 14.1%	FY2016 **20.0%** $17.1M of $85.5M · median town 12.2%	FY2025 **13.4%** $16.9M of $126M · median town 11.5%	Net of state charges, FY2025 **10.0%** FY2010: 20.7% · median town 10.0%

Northampton's state aid did not keep pace with either price measure: FY2025 aid was 36.3% below its FY2006 aid grown by Boston-area consumer prices and 43.4% below grown by the government price index.

Gross state aid went from $17.1 million in FY2006 to $16.9 million in FY2025, –1.2% in dollars. Flag: in FY2010, $3.1 million of Northampton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.4%** $9.7M to $14.2M · all towns +54.0%	All fixed costs, FY2016–25 **+47.8%** $17.1M to $25.2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Northampton's health insurance would have been $12.2 million in FY2025; it was $14.2 million, $2.00 million above the path. Its fixed costs would have been $21.3 million in FY2025; it was $25.2 million, $3.91 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Northampton came to $892,000, 20.1% of the $4.43 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$892,000	20.1%	28.2%
Placed in the town	$2.1M	48.3%	42.3%
Everything placed	$2.1M	48.3%	45.2%

SCHOOLS

Northampton's required school contribution is 3.1% of median household income, 45th highest of 351.

Chapter 70 aid, FY2026 **$9.6M** to the town's district	Required local contribution **$33.8M** FY2026
Share of household income **3.1%** 45th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Northampton runs its own school district and also belongs to Northampton Smith; Northampton accounts for 100% of that district's foundation budget.

EXPECTED AND ACTUAL

Northampton received $22.7 million in earmarks placed in the town and competitive grants over ten years, about the $23.4 million its size, need and institutions predict.

PEERS

Northampton ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Northampton this town	**28**	**$6,641**	**$603**	**$73.53**	**1.28**	**3.1%**
Salem peer	46	$10,823	$853	$157	2.62	2.9%
Yarmouth peer	27	$6,216	$356	$8.62	0.82	3.0%
Fairhaven peer	47	$10,747	$508	$12.58	0.36	2.8%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Marlborough peer	53	$13,835	$804	$65.97	1.57	3.4%
Great Barrington best in class of 30	42	$9,461	$2,113	$175	2.92	3.7%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Northborough

Town · Worcester County · 15,750 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

19th Worcester · Kate Donaghue
76% of residents
12th Worcester · Meghan K. Kilcoyne
24% of residents
Northborough is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Worcester · Robyn K. Kennedy

SCHOOL DISTRICTS

Northborough Public Schools, the town's own district
Northboro-Southboro Regional School District, shared with Southborough
Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Hudson, Marlborough, Maynard, Southborough and Westborough

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Northborough scores 35 on the Fairness Index for all state aid and 15 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100
260th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	47	28	33

Rank under other weightings: 244th to 273rd.

Stable low: below 45 under every weighting

Northborough received less than its share of state aid on all four measures; its blended score of 35 stays between 32 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

15 / 100
333rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
13	22	12	14

Rank under other weightings: 331st to 336th.

Stable low: below 45 under every weighting

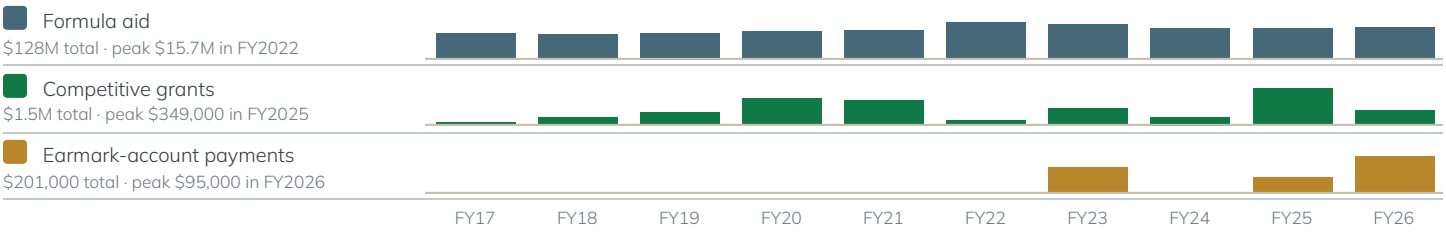
Northborough received less than its share of discretionary money on all four measures; its blended score of 15 stays between 14 and 17 under every weighting tested.

STATE MONEY, FY2017–FY2026

Northborough's town government and school districts received $128 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$128M	**$1.5M**	**$201,000**
$8,121 per resident (248th of 351) · gross	$93.72 per resident (329th of 351)	$12.78 per resident (240th of 351)

Competitive grants to Northborough peaked in FY2025 at $349,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.8 million, are not shown.

EARMARKS

Northborough received $462,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$462,000	**$462,000**	**$462,000**	**Not a member**
$29.37 per resident (231st of 351)	$29.37 per resident (243rd of 351)	$29.37 per resident (243rd of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2026. Every one names Northborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$150,000	"reimbursements for litigation and environmental protection fees for Northborough"	Enacted names the town
FY2026	$65,000	"the town of Northborough for downtown public sidewalk improvements"	Enacted names the town
FY2022	$60,000	"the procurement and implementation of a body camera program in the town of Northborough's police department"	Enacted names the town
FY2025	$50,000	"the town of Northborough for the design of a drainage repair project in Assabet Hill"	Enacted names the town
FY2023	$50,000	"the town of Northborough for replacement of the culvert on Lincoln street"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Northborough received 29% of its proportional share of competitive grant awards.

Local road miles **81.2** 150th of 351 · 5.2 per 1,000 residents (224th of 351)	Town-owned bridges, replacement cost **$7.4M** scored exposure $3M · three in poor condition	Road-stream crossings **132** 61st of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **18.5 sq mi** 11% state-owned	Seasonal homes **1%** share of housing units	Peak service population **15,865** residents plus seasonal	Core infrastructure index **0.51** roads, culverts, dams, coast, flood, energy

Burden index 0.29; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **430 acres** 3.6% of land area · FY2026	State-owned land PILOT, FY2026 **$234,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$544** statewide $117 · FY2026	New growth per resident **$26,309** FY2017–2025 · 131st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.4% of Northborough's general-fund spending in FY2025, down from 12.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.2%** $4.7M of $38M · median town 14.1%	FY2016 **10.2%** $5.4M of $52.7M · median town 12.2%	FY2025 **8.4%** $6.2M of $73.7M · median town 11.5%	Net of state charges, FY2025 **8.0%** FY2010: 10.9% · median town 10.0%

Northborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Northborough's state aid did not keep pace with either price measure: FY2025 aid was 14.3% below its FY2006 aid grown by Boston-area consumer prices and 23.8% below grown by the government price index.

Gross state aid went from $4.7 million in FY2006 to $6.2 million in FY2025, +33.0% in dollars. Flag: in FY2010, $616,000 of Northborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.0%** $4.6M to $6.1M · all towns +54.0%	All fixed costs, FY2016–25 **+53.3%** $6.7M to $10.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Northborough's health insurance would have been $5.73 million in FY2025; it was $6.10 million, $370,000 above the path. Its fixed costs would have been $8.37 million in FY2025; it was $10.3 million, $1.91 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Northborough came to $398,000, 26.3% of the $1.51 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$398,000	26.3%	28.2%
Placed in the town	$398,000	26.3%	42.3%
Everything placed	$398,000	26.3%	45.2%

SCHOOLS

Northborough's required school contribution is 3.0% of median household income, 80th highest of 351.

Chapter 70 aid, FY2026 **$7.1M** to the town's district	Required local contribution **$27.2M** FY2026
Share of household income **3.0%** 80th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Northborough runs its own district for some grades and belongs to Northboro-Southboro and Assabet Valley for others; Northborough accounts for 61% and 7% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Northborough received $2 million in earmarks placed in the town and competitive grants over ten years, 39% of the $5.1 million its size, need and institutions predict.

PEERS

Northborough ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Northborough this town	**35**	**$8,121**	**$93.72**	**$29.37**	**0.29**	**3.0%**
Hanover peer	38	$9,140	$220	$18.83	0.60	2.8%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Northbridge

Town · Worcester County · 16,458 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Worcester · David K. Muradian, Jr.

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Northbridge Public Schools, the town's own district

Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury and four others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Northbridge scores 56 on the Fairness Index for all state aid and 45 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

69th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	52	56	63

Rank under other weightings: 57th to 92nd.

Weighting-dependent: the range crosses the 45–55 band

Northbridge received more than its share of state aid on all four measures; its blended score of 56 stays between 54 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

45 / 100

204th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	40	46	52

Rank under other weightings: 194th to 220th.

Weighting-dependent: the range crosses the 45–55 band

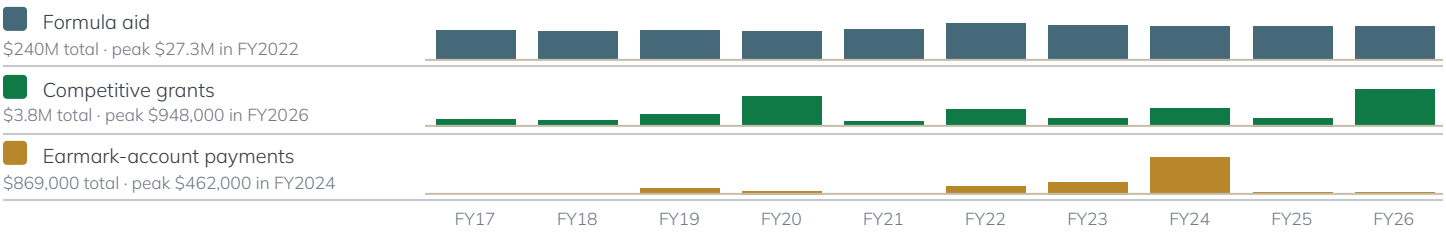
Northbridge received less than its share of discretionary money on three of four measures; its blended score of 45 stays between 43 and 47 under every weighting tested.

STATE MONEY, FY2017–FY2026

Northbridge's town government and school districts received $240 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$240M	**$3.8M**	**$869,000**
$14,554 per resident (82nd of 351) · gross	$230 per resident (237th of 351)	$52.80 per resident (75th of 351)

Competitive grants to Northbridge peaked in FY2026 at $948,000, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.4 million, are not shown.

EARMARKS

Northbridge received $2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2M	**$2M**	**$2M**	**Not a member**
$124 per resident (26th of 351)	$124 per resident (45th of 351)	$124 per resident (50th of 351)	35 municipalities had none

Placed in the town: 20 clauses in ten of ten budgets; the most recent in FY2026. Every one names Northbridge directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$500,000	"Blackstone Valley Chamber of Commerce, Inc. in the village of Whitinsville in the town of Northbridge for workforce training, small business…"	Enacted names the town
FY2023	$500,000	"the George Marston Whitin Memorial Community Association, Inc. in the village of Whitinsville in the town of Northbridge for renovations to the…"	Enacted names the town
FY2024	$350,000	"the Central Massachusetts Center for Business and Enterprise, Inc. in the village of Whitinsville in the town of Northbridge for professional…"	Enacted names the town
FY2024	$250,000	"the Blackstone Valley Chamber of Commerce, Inc. in the Whitinsville village of the town of Northbridge for small business expansion and regional…"	Enacted names the town
FY2017	$56,000	"the town of Northbridge for public safety improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Northbridge received 74% of its proportional share of competitive grant awards.

Local road miles **78.5** 161st of 351 · 4.8 per 1,000 residents (247th of 351)	Town-owned bridges, replacement cost **$22.8M** scored exposure $11.4M · 3.5 in poor condition	Road-stream crossings **107** 105th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.3 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **16,458** residents plus seasonal	Core infrastructure index **1.51** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **940 acres** 8.5% of land area · FY2026	State-owned land PILOT, FY2026 **$151,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$161** statewide $117 · FY2026	New growth per resident **$14,623** FY2017–2025 · 258th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 35.1% of Northbridge's general-fund spending in FY2025, down from 45.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **45.0%** $17.7M of $39.4M · median town 14.1%	FY2016 **44.1%** $18.1M of $40.9M · median town 12.2%	FY2025 **35.1%** $19.7M of $56M · median town 11.5%	Net of state charges, FY2025 **32.6%** FY2010: 46.7% · median town 10.0%

Northbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Northbridge's state aid did not keep pace with either price measure: FY2025 aid was 28.6% below its FY2006 aid grown by Boston-area consumer prices and 36.5% below grown by the government price index.

Gross state aid went from $17.7 million in FY2006 to $19.7 million in FY2025, +10.8% in dollars. Flag: in FY2010, $1.9 million of Northbridge's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–3.8%** $5.4M to $5.2M · all towns +54.0%	All fixed costs, FY2016–25 **+7.6%** $8M to $8.6M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Northbridge's health insurance would have been $6.78 million in FY2025; it was $5.22 million, $1.55 million below the path. Its fixed costs would have been $9.98 million in FY2025; it was $8.59 million, $1.38 million below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Northbridge's reported health insurance fell from $5.4 million in FY2016 to $5.2 million in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2M	no increase	28.2%
Placed in the town	$2M	no increase	42.3%
Everything placed	$2M	no increase	45.2%

SCHOOLS

Northbridge's required school contribution is 2.4% of median household income, 263rd highest of 351.

Chapter 70 aid, FY2026 **$17.8M** to the town's district	Required local contribution **$17.8M** FY2026
Share of household income **2.4%** 263rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Northbridge runs its own school district and also belongs to Blackstone Valley; Northbridge accounts for 12% of that district's foundation budget.

EXPECTED AND ACTUAL

Northbridge received $7.8 million in earmarks placed in the town and competitive grants over ten years, 7% more than the $7.3 million its size, need and institutions predict.

PEERS

Northbridge ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Northbridge this town	**56**	**$14,554**	**$230**	**$124**	**0.74**	**2.4%**
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Middleborough peer	45	$12,235	$110	$13.47	0.78	2.8%
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Northfield

Town · Franklin County · 2,872 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Franklin · Susannah M. Whipps

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Pioneer Valley Regional School District, shared with Bernardston and Leyden
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Northfield scores 52 on the Fairness Index for all state aid and 85 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

101st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	53	51	54

Rank under other weightings: 95th to 111th.

Near fair: between 45 and 55 under every weighting

Northfield received more than its share of state aid on all four measures; its blended score of 53 stays between 52 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

85 / 100

58th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
85	85	82	86

Rank under other weightings: 54th to 60th.

Stable high: above 55 under every weighting

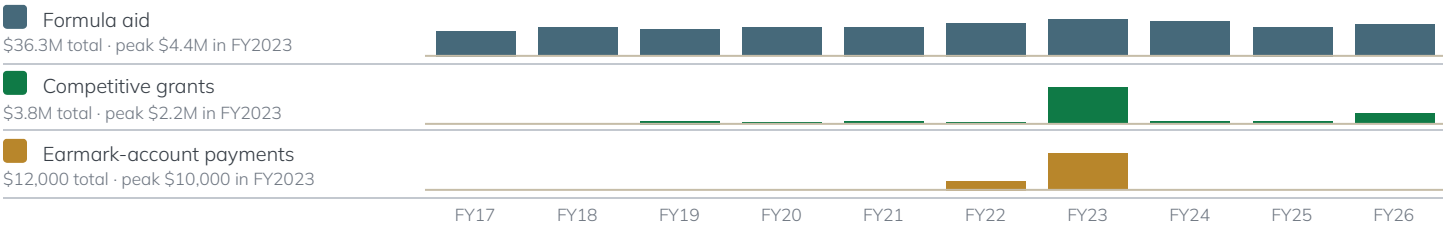
Northfield received more than its share of discretionary money on all four measures; its blended score of 85 stays between 84 and 85 under every weighting tested.

STATE MONEY, FY2017–FY2026

Northfield's town government and school districts received $36.3 million in formula aid and $3.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$36.3M	**$3.8M**	**$12,000**
$12,644 per resident (117th of 351) · gross	$1,336 per resident (60th of 351)	$4.35 per resident (296th of 351)

Competitive grants to Northfield peaked in FY2023 at $2.2 million, 58% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.6 million, are not shown.

EARMARKS

Northfield received $10,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$10,000	**$10,000**	**$10,000**	**Not a member**
$3.48 per resident (309th of 351)	$3.48 per resident (315th of 351)	$3.48 per resident (315th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2023. Every one names Northfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$10,000	"the town of Northfield for its three hundred and fiftieth anniversary"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Northfield received 1.74 times its proportional share of competitive grant awards.

Local road miles **65.4** 201st of 351 · 22.8 per 1,000 residents (51st of 351)	Town-owned bridges, replacement cost **$6.7M** scored exposure $4M · two in poor condition	Road-stream crossings **97** 123rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **34.3 sq mi** 21% state-owned	Seasonal homes **2%** share of housing units	Peak service population **2,922** residents plus seasonal	Core infrastructure index **3.69** roads, culverts, dams, coast, flood, energy

Burden index 1.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,250 acres** 19.4% of land area · FY2026	State-owned land PILOT, FY2026 **$123,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$28.96** statewide $117 · FY2026	New growth per resident **$37,958** FY2017–2025 · 68th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.0% of Northfield's general-fund spending in FY2025, down from 9.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.2%** $542,000 of $5.9M · median town 14.1%	FY2016 **5.2%** $434,000 of $8.4M · median town 12.2%	FY2025 **6.0%** $591,000 of $9.9M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 5.7% · median town 10.0%

Northfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Northfield's state aid did not keep pace with either price measure: FY2025 aid was 29.6% below its FY2006 aid grown by Boston-area consumer prices and 37.4% below grown by the government price index.

Gross state aid went from $542,000 in FY2006 to $591,000 in FY2025, +9.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.0%** $203,000 to $248,000 · all towns +54.0%	All fixed costs, FY2016–25 **+27.6%** $457,000 to $583,000 · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Northfield's health insurance would have been $254,000 in FY2025; it was $248,000, $5,876 below the path. Its fixed costs would have been $570,000 in FY2025; it was $583,000, $12,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Northfield came to $10,000, 22.3% of the $45,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$10,000	22.3%	28.2%
Placed in the town	$10,000	22.3%	42.3%
Everything placed	$10,000	22.3%	45.2%

SCHOOLS

Northfield's required school contribution is 2.7% of median household income, 159th highest of 351.

Chapter 70 aid, FY2026 **$1.7M** attributed to the town	Required local contribution **$3.6M** FY2026
Share of household income **2.7%** 159th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–16%** after inflation

EXPECTED AND ACTUAL

Northfield received $3.8 million in earmarks placed in the town and competitive grants over ten years, 17% more than the $3.2 million its size, need and institutions predict.

Northfield has no school district of its own. Its pupils attend Pioneer and Franklin County; Northfield accounts for 46% and 8% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Northfield ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Northfield this town	**52**	**$12,644**	**$1,336**	**$3.48**	**1.74**	**2.7%**
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Plympton peer	35	$9,237	$274	$114	0.71	3.4%
Deerfield peer	44	$9,461	$1,195	$6.46	2.83	2.4%
Westhampton peer	42	$11,067	$887	$0	0.62	3.3%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Norton

Town · Bristol County · 19,240 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Bristol · Michael S. Chaisson 61% of residents
4th Bristol · Steven S. Howitt 39% of residents

Norton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Norton Public Schools, the town's own district
Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Foxborough, Mansfield, Sharon, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Norton scores 44 on the Fairness Index for all state aid and 10 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

171st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	47	45	42

Rank under other weightings: 164th to 184th.

Weighting-dependent: the range crosses the 45–55 band

Norton received less than its share of state aid on all four measures; its blended score of 44 stays between 43 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

10 / 100

346th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
10	12	11	10

Rank under other weightings: 344th to 348th.

Stable low: below 45 under every weighting

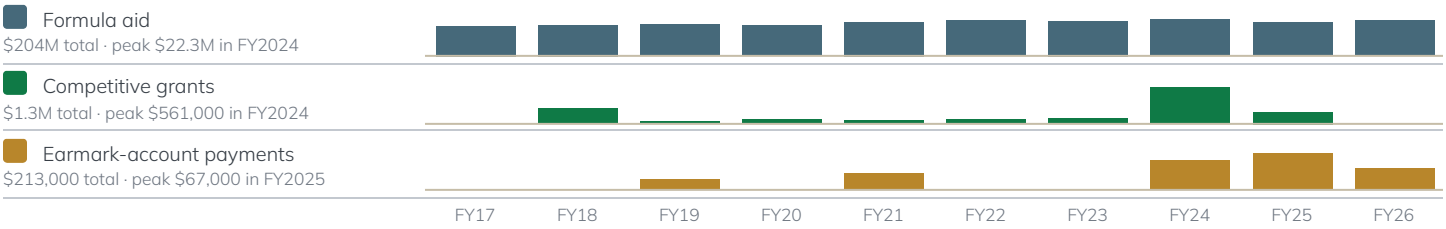
Norton received less than its share of discretionary money on all four measures; its blended score of 10 stays between 10 and 11 under every weighting tested.

STATE MONEY, FY2017–FY2026

Norton's town government and school districts received $204 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$204M	**$1.3M**	**$213,000**
$10,594 per resident (164th of 351) · gross	$69.10 per resident (340th of 351)	$11.09 per resident (253rd of 351)

Competitive grants to Norton peaked in FY2024 at $561,000, 42% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9 million, are not shown.

EARMARKS

Norton received $569,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$569,000	**$569,000**	**$569,000**	**Not a member**
$29.56 per resident (230th of 351)	$29.56 per resident (242nd of 351)	$29.56 per resident (242nd of 351)	35 municipalities had none

Placed in the town: 19 clauses in nine of ten budgets; the most recent in FY2026. Every one names Norton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$100,000	"said Massachusetts Military Support Foundation, Inc. for capital expenditures and improvements and for operational costs associated with the…"	Enacted names the town
FY2023	$50,000	"costs associated with the creation of the multi-generational center at the council on aging in the town of Norton"	Enacted names the town
FY2022	$50,000 (split two ways)	"The Young Mens Christian Association of Attleborough serving the towns of Attleboro and Norton and its tenant partners to renovate the Sweet…"	Enacted names the town
FY2017	$50,000	"public safety improvements on state highway routes 123 and 140 in the town of Norton"	Enacted names the town
FY2025	$32,000	"the Norton fire department for the purchase of turnout gear"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Norton received 74% of its proportional share of competitive grant awards.

Local road miles **93.7** 111th of 351 · 4.9 per 1,000 residents (241st of 351)	Town-owned bridges, replacement cost **$16.1M** scored exposure $3.8M · one in poor condition	Road-stream crossings **101** 115th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **27.8 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **19,258** residents plus seasonal	Core infrastructure index **0.16** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **164 acres** 0.9% of land area · FY2026	State-owned land PILOT, FY2026 **$38,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$232** statewide $117 · FY2026	New growth per resident **$29,653** FY2017–2025 · 108th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.0% of Norton's general-fund spending in FY2025, down from 36.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **36.6%** $16.2M of $44.2M · median town 14.1%	FY2016 **28.4%** $14.9M of $52.4M · median town 12.2%	FY2025 **23.0%** $18M of $78M · median town 11.5%	Net of state charges, FY2025 **20.8%** FY2010: 30.3% · median town 10.0%

Norton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $584,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Norton's state aid did not keep pace with either price measure: FY2025 aid was 28.5% below its FY2006 aid grown by Boston-area consumer prices and 36.4% below grown by the government price index.

Gross state aid went from $16.2 million in FY2006 to $18 million in FY2025, +11.0% in dollars. Flag: in FY2010, $1.3 million of Norton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+26.3%** $6.9M to $8.7M · all towns +54.0%	All fixed costs, FY2016–25 **+44.0%** $10.2M to $14.6M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Norton's health insurance would have been $8.60 million in FY2025; it was $8.69 million, $95,000 above the path. Its fixed costs would have been $12.7 million in FY2025; it was $14.6 million, $1.94 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Norton came to $504,000, 27.8% of the $1.81 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$504,000	27.8%	28.2%
Placed in the town	$504,000	27.8%	42.3%
Everything placed	$504,000	27.8%	45.2%

SCHOOLS

Norton's required school contribution is 3.1% of median household income, 55th highest of 351.

Chapter 70 aid, FY2026 **$14.2M** to the town's district	Required local contribution **$25.4M** FY2026
Share of household income **3.1%** 55th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–5%** after inflation

Norton runs its own school district and also belongs to Southeastern and Bristol County; Norton accounts for 5% and 3% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Norton received $1.9 million in earmarks placed in the town and competitive grants over ten years, 36% of the $5.3 million its size, need and institutions predict.

PEERS

Norton ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Norton this town	**44**	**$10,594**	**$69.10**	**$29.56**	**0.74**	**3.1%**
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Lunenburg peer	40	$10,667	$157	$54.36	0.42	2.7%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Norwell

Town · Plymouth County · 11,361 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Plymouth · David F. DeCoste 68% of residents
4th Plymouth · Patrick Joseph Kearney 32% of residents

Norwell is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS

Norwell Public Schools, the town's own district
South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Hanson, Marshfield, Rockland, Scituate and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Norwell scores 35 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

266th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	58	24	23

Rank under other weightings: 222nd to 307th.

Stable low: below 45 under every weighting

Norwell received less than its share of state aid on three of four measures; its blended score of 35 stays between 28 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

110th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	86	62	58

Rank under other weightings: 92nd to 123rd.

Stable high: above 55 under every weighting

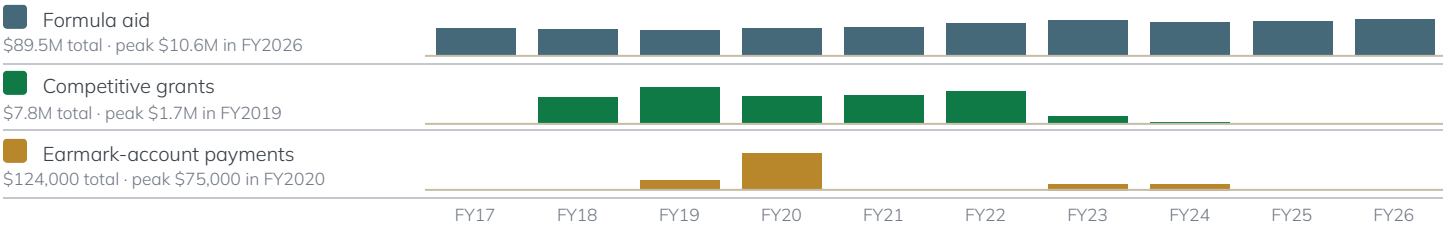
Norwell received more than its share of discretionary money on all four measures; its blended score of 69 stays between 64 and 75 under every weighting tested.

STATE MONEY, FY2017–FY2026

Norwell's town government and school districts received $89.5 million in formula aid and $7.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$89.5M	**$7.8M**	**$124,000**
$7,878 per resident (260th of 351) · gross	$687 per resident (114th of 351)	$10.88 per resident (255th of 351)

Competitive grants to Norwell peaked in FY2019 at $1.7 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.7 million, are not shown.

EARMARKS

Norwell received $622,000 in local earmarks naming the town, $654,000 placed in the town and $654,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$622,000	**$654,000**	**$654,000**	**Not a member**
$54.79 per resident (131st of 351)	$57.61 per resident (145th of 351)	$57.61 per resident (152nd of 351)	35 municipalities had none

Placed in the town: 20 clauses in ten of ten budgets; the most recent in FY2026. $622,000 came in clauses that name Norwell; the other $32,000 went to organizations based in Norwell, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$150,000	"The Company Theatre, Inc., in the town of Norwell for costs associated with general operations, maintenance and programming"	Enacted names the town
FY2022	$80,000	"Norwell Visiting Nurse Association and Hospice in the town of Norwell to support their telehealth program"	Enacted names the town
FY2023	$45,000	"the Norwell Grange Corporation in the town of Norwell"	Enacted names the town
FY2019	$38,000 (split two ways)	"regional animal control in Cohasset, Hull and Norwell"	Enacted names the town
FY2024	$35,000	"Norwell Visiting Nurse Association, Inc. in the town of Norwell"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Norwell received 1.24 times its proportional share of competitive grant awards.

Local road miles **75.0** 173rd of 351 · 6.6 per 1,000 residents (170th of 351)	Town-owned bridges, replacement cost **$216,000** scored exposure $48,000 · none in poor condition	Road-stream crossings **57** 236th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **20.9 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **11,361** residents plus seasonal	Core infrastructure index **0.54** roads, culverts, dams, coast, flood, energy

Burden index 1.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$3,858** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$12,860** statewide $117 · FY2026	New growth per resident **$29,158** FY2017–2025 · 111th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.5% of Norwell's general-fund spending in FY2025, down from 12.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.5%** $4.3M of $34.2M · median town 14.1%	FY2016 **10.7%** $5.1M of $48.2M · median town 12.2%	FY2025 **9.5%** $6.7M of $70.3M · median town 11.5%	Net of state charges, FY2025 **7.2%** FY2010: 8.9% · median town 10.0%

Norwell's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $81,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Norwell's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 0.8% above its FY2006 aid grown by Boston-area consumer prices and 10.4% below grown by the government price index.

Gross state aid went from $4.3 million in FY2006 to $6.7 million in FY2025, +56.3% in dollars. Flag: in FY2010, $657,000 of Norwell's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.8%** $4.4M to $6.4M · all towns +54.0%	All fixed costs, FY2016–25 **+112.1%** $5.4M to $11.4M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Norwell's health insurance would have been $5.55 million in FY2025; it was $6.35 million, $798,000 above the path. Its fixed costs would have been $6.69 million in FY2025; it was $11.4 million, $4.67 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+52%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Norwell came to $562,000, 29.5% of the $1.90 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$562,000	29.5%	28.2%
Placed in the town	$570,000	29.9%	42.3%
Everything placed	$570,000	29.9%	45.2%

SCHOOLS

Norwell's required school contribution is 3.4% of median household income, 25th highest of 351.

Chapter 70 aid, FY2026 **$5.7M** to the town's district	Required local contribution **$23.3M** FY2026
Share of household income **3.4%** 25th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Norwell runs its own school district and also belongs to South Shore; Norwell accounts for 4% of that district's foundation budget.

EXPECTED AND ACTUAL

Norwell received $8.7 million in earmarks placed in the town and competitive grants over ten years, 82% more than the $4.8 million its size, need and institutions predict.

PEERS

Norwell ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Norwell this town	**35**	**$7,878**	**$687**	**$57.61**	**1.24**	**3.4%**
Medfield peer	38	$8,137	$388	$46.47	2.14	2.3%
Hopkinton peer	31	$7,048	$297	$94.08	0.33	3.1%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Norwood

Town · Norfolk County · 31,542 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Norfolk · John H. Rogers

STATE SENATE

Norfolk and Suffolk · Michael F. Rush

SCHOOL DISTRICTS

Norwood Public Schools, the town's own district

Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Dedham, Holbrook, Milton, Randolph and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Norwood scores 34 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

268th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	31	34	41

Rank under other weightings: 235th to 299th.

Stable low: below 45 under every weighting

Norwood received less than its share of state aid on all four measures; its blended score of 34 stays between 32 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

299th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	22	22	30

Rank under other weightings: 279th to 307th.

Stable low: below 45 under every weighting

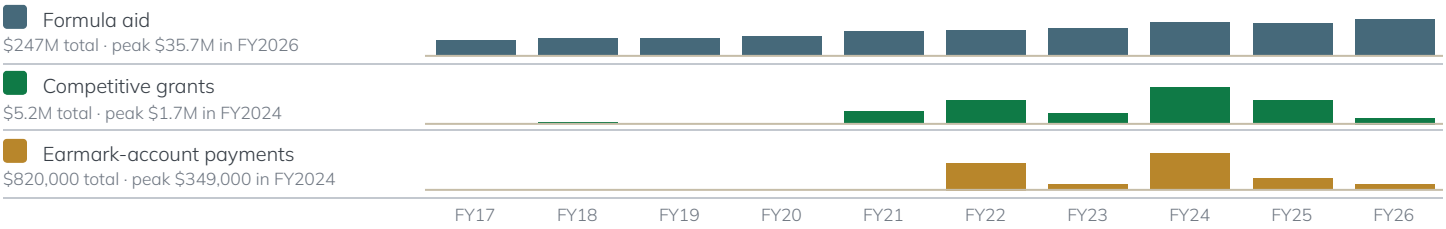
Norwood received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 25 under every weighting tested.

STATE MONEY, FY2017–FY2026

Norwood's town government and school districts received $247 million in formula aid and $5.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$247M	$5.2M	$820,000
$7,831 per resident (261st of 351) · gross	$166 per resident (270th of 351)	$25.99 per resident (170th of 351)

Competitive grants to Norwood peaked in FY2024 at $1.7 million, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $38 million, are not shown.

EARMARKS

Norwood received $725,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$725,000	$725,000	$725,000	Not a member
$22.99 per resident (256th of 351)	$22.99 per resident (265th of 351)	$22.99 per resident (266th of 351)	35 municipalities had none

Placed in the town: 13 clauses in eight of ten budgets; the most recent in FY2026. Every one names Norwood directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$150,000	"the design and construction of the Tyler Jacoby Lawrence Memorial park at the Norwood Memorial airport"	Enacted names the town
FY2022	$125,000	"the town of Norwood for a sesquicentennial celebration"	Enacted names the town
FY2026	$90,000	"the creation of John J. Lightizer Memorial park in the town of Norwood"	Enacted names the town
FY2026	$50,000	"Norwood high school to retrofit its decommissioned ambulance to create an ambulance simulator to provide emergency medical services training and…"	Enacted names the town
FY2026	$50,000	"the town of Norwood for the Norwood Hospital Task Force to conduct economic analysis"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Norwood received 33% of its proportional share of competitive grant awards.

Local road miles **100.4** 93rd of 351 · 3.2 per 1,000 residents (309th of 351)	Town-owned bridges, replacement cost **$11.3M** scored exposure $3.1M · none in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **10.4 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **31,802** residents plus seasonal	Core infrastructure index **1.51** roads, culverts, dams, coast, flood, energy

Burden index 0.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$18,315** FY2017–2025 · 211th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.1% of Norwood's general-fund spending in FY2025, up from 10.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.6%** $9.3M of $87.5M · median town 14.1%	FY2016 **8.6%** $10.3M of $120M · median town 12.2%	FY2025 **15.1%** $23.5M of $155M · median town 11.5%	Net of state charges, FY2025 **13.4%** FY2010: 8.2% · median town 10.0%

Norwood's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $826,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Norwood's state aid kept pace with both price measures: FY2025 aid was 63.5% above its FY2006 aid grown by Boston-area consumer prices and 45.3% above grown by the government price index.

Gross state aid went from $9.3 million in FY2006 to $23.5 million in FY2025, +153.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+29.0%** $13.9M to $17.9M · all towns +54.0%	All fixed costs, FY2016–25 **+49.0%** $18M to $26.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Norwood's health insurance would have been $17.3 million in FY2025; it was $17.9 million, $575,000 above the path. Its fixed costs would have been $22.5 million in FY2025; it was $26.8 million, $4.34 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Norwood came to $520,000, 12.9% of the $4.03 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$520,000	12.9%	28.2%
Placed in the town	$520,000	12.9%	42.3%
Everything placed	$520,000	12.9%	45.2%

SCHOOLS

Norwood's required school contribution is 3.0% of median household income, 71st highest of 351.

Chapter 70 aid, FY2026 **$19.3M** to the town's district	Required local contribution **$43M** FY2026
Share of household income **3.0%** 71st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+115%** after inflation

Norwood runs its own school district and also belongs to Blue Hills and Norfolk County; Norwood accounts for 10% and 5% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Norwood received $6.1 million in earmarks placed in the town and competitive grants over ten years, 59% of the $10.3 million its size, need and institutions predict.

PEERS

Norwood ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Norwood this town	**34**	**$7,831**	**$166**	**$22.99**	**0.33**	**3.0%**
Yarmouth peer · lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Dartmouth peer	29	$6,506	$296	$157	0.73	3.6%
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Weymouth peer	39	$8,687	$450	$104	2.15	2.8%
Great Barrington best in class of 30	42	$9,461	$2,113	$175	2.92	3.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Oak Bluffs

Town · Dukes County · 5,407 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Oak Bluffs Public Schools, the town's own district

Martha's Vineyard Regional School District, shared with Aquinnah, Chilmark, Edgartown, Tisbury and West Tisbury

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

Oak Bluffs scores 51 on the Fairness Index for all state aid and 95 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

117th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	66	46	48

Rank under other weightings: 83rd to 139th.

Near fair: between 45 and 55 under every weighting

Oak Bluffs received less than its share of state aid on three of four measures; its blended score of 51 stays between 47 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

95 / 100

20th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	98	92	95

Rank under other weightings: 15th to 27th.

Stable high: above 55 under every weighting

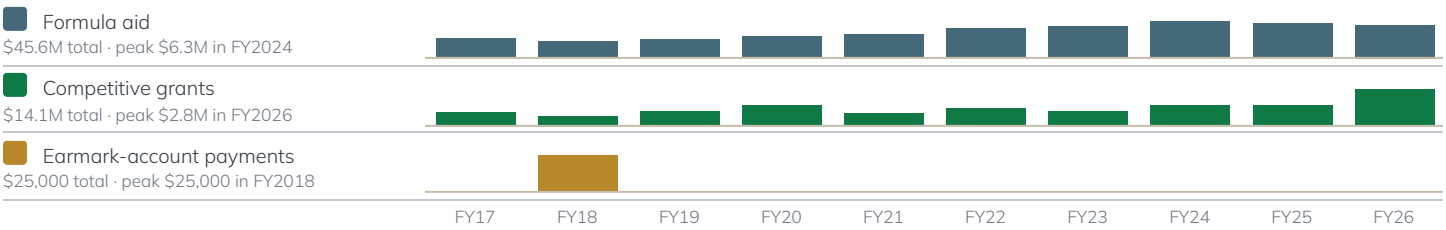
Oak Bluffs received more than its share of discretionary money on all four measures; its blended score of 95 stays between 94 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Oak Bluffs's town government and school districts received $45.6 million in formula aid and $14.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$45.6M	**$14.1M**	**$25,000**
$8,440 per resident (237th of 351) · gross	$2,606 per resident (36th of 351)	$4.62 per resident (290th of 351)

Competitive grants to Oak Bluffs peaked in FY2026 at $2.8 million, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $31.4 million, are not shown.

EARMARKS

Oak Bluffs received $65,000 in local earmarks naming the town, $505,000 placed in the town and $505,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$65,000	**$505,000**	**$505,000**	**Not a member**
$12.02 per resident (295th of 351)	$93.40 per resident (80th of 351)	$93.40 per resident (91st of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2024. $65,000 came in clauses that name Oak Bluffs; the other $440,000 went to organizations based in Oak Bluffs, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$125,000	"the purposes defined in item 1599-2009 in section 2 of chapter 182 of the acts of 2008"	Enacted recipient based here
FY2018	$100,000	"not less than $100,000, of which not less than $25,000 of said funds shall be expended to contract with Martha's Vineyard Community Services, Inc...."	Enacted recipient based here
FY2024	$65,000	"the Oak Bluffs water district to conduct an island-wide assessment on the presence of polyfluoroalkyl substances in the Martha's Vineyard aquifer and..."	Enacted names the town
FY2024	$50,000	"Martha's Vineyard Community Services, Inc. for increased access to health and human services on Martha's Vineyard"	Enacted recipient based here
FY2023	$50,000	"Martha's Vineyard Community Services for the purpose of increasing access to health and human services on Martha's Vineyard"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Oak Bluffs received 3.64 times its proportional share of competitive grant awards.

Local road miles **36.3** 306th of 351 · 6.7 per 1,000 residents (167th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **7** 340th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **7.3 sq mi** 1% state-owned	Seasonal homes **56%** share of housing units	Peak service population **12,546** residents plus seasonal	Core infrastructure index **5.01** roads, culverts, dams, coast, flood, energy

Burden index 3.64; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **56 acres** 1.2% of land area · FY2026	State-owned land PILOT, FY2026 **$239,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$4,230** statewide $117 · FY2026	New growth per resident **$59,932** FY2017–2025 · 25th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.6% of Oak Bluffs's general-fund spending in FY2025, down from 8.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.0%** $1.7M of $21M · median town 14.1%	FY2016 **5.3%** $1.5M of $27.7M · median town 12.2%	FY2025 **6.6%** $2.8M of $41.8M · median town 11.5%	Net of state charges, FY2025 **3.7%** FY2010: 3.9% · median town 10.0%

Oak Bluffs's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $994,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Oak Bluffs's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 5.9% above its FY2006 aid grown by Boston-area consumer prices and 5.9% below grown by the government price index.

Gross state aid went from $1.7 million in FY2006 to $2.8 million in FY2025, +64.3% in dollars. Flag: in FY2010, $568,000 of Oak Bluffs's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.7%** $2.3M to $3.6M · all towns +54.0%	All fixed costs, FY2016–25 **+55.8%** $3.5M to $5.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Oak Bluffs's health insurance would have been $2.85 million in FY2025; it was $3.60 million, $749,000 above the path. Its fixed costs would have been $4.38 million in FY2025; it was $5.47 million, $1.09 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Oak Bluffs came to $65,000, 4.9% of the $1.32 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$65,000	4.9%	28.2%
Placed in the town	$505,000	38.4%	42.3%
Everything placed	$505,000	38.4%	45.2%

SCHOOLS

Oak Bluffs's required school contribution is 3.0% of median household income, 83rd highest of 351.

Chapter 70 aid, FY2026 **$3.1M** to the town's district	Required local contribution **$8.4M** FY2026
Share of household income **3.0%** 83rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+37%** after inflation

Oak Bluffs runs its own district for some grades and belongs to Martha's Vineyard for others; Oak Bluffs accounts for 28% of that district's foundation budget.

EXPECTED AND ACTUAL

Oak Bluffs received $14.7 million in earmarks placed in the town and competitive grants over ten years, 3.1 times the $4.8 million its size, need and institutions predict.

PEERS

Oak Bluffs ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Oak Bluffs this town	**51**	**$8,440**	**$2,606**	**$93.40**	**3.64**	**3.0%**
Wenham peer	29	$6,869	$147	$69.20	0.80	2.5%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%
Boxborough peer	34	$8,257	$231	$43.67	0.36	2.8%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Oakham

Town · Worcester County · 1,639 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Quabbin Regional School District, shared with Barre, Hardwick, Hubbardston and New Braintree

Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, Monson, New Braintree, Palmer, Ware and Warren

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Oakham scores 61 on the Fairness Index for all state aid and 71 for discretionary money. Fifty is a fair share.

ALL STATE AID

61 / 100

41st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	65	53	62

Rank under other weightings: 33rd to 50th.

Stable high: above 55 under every weighting

Oakham received more than its share of state aid on all four measures; its blended score of 61 stays between 59 and 63 under every weighting tested.

DISCRETIONARY MONEY ONLY

71 / 100

103rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	73	69	70

Rank under other weightings: 101st to 106th.

Stable high: above 55 under every weighting

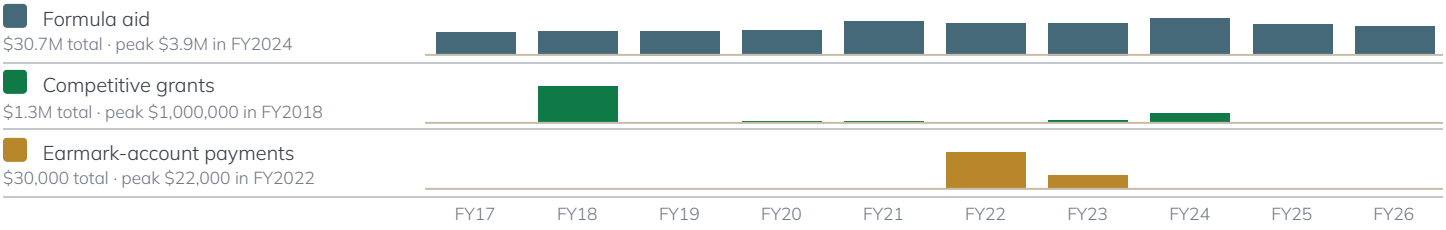
Oakham received more than its share of discretionary money on all four measures; its blended score of 71 stays between 70 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Oakham's town government and school districts received $30.7 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$30.7M	$1.3M	$30,000
$18,722 per resident (38th of 351) · gross	$794 per resident (95th of 351)	$18.28 per resident (213th of 351)

Competitive grants to Oakham peaked in FY2018 at $1,000,000, 77% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $946,000, are not shown.

EARMARKS

Oakham received $20,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$20,000	$20,000	$20,000	Not a member
$12.20 per resident (294th of 351)	$12.20 per resident (303rd of 351)	$12.20 per resident (304th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2022. Every one names Oakham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$20,000	"the police department in the town of Oakham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Oakham received 1.24 times its proportional share of competitive grant awards.

Local road miles **44.1** 272nd of 351 · 26.9 per 1,000 residents (47th of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $788,000 · one in poor condition	Road-stream crossings **85** 154th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.8 sq mi** 30% state-owned	Seasonal homes **4%** share of housing units	Peak service population **1,716** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 1.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,393 acres** 10.5% of land area · FY2026	State-owned land PILOT, FY2026 **$161,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$115** statewide $117 · FY2026	New growth per resident **$15,257** FY2017–2025 · 249th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.6% of Oakham's general-fund spending in FY2025, down from 13.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.0%** $288,000 of $2.2M · median town 14.1%	FY2016 **8.0%** $273,000 of $3.4M · median town 12.2%	FY2025 **8.6%** $415,000 of $4.8M · median town 11.5%	Net of state charges, FY2025 **8.5%** FY2010: 9.8% · median town 10.0%

Oakham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Oakham's state aid did not keep pace with either price measure: FY2025 aid was 7.1% below its FY2006 aid grown by Boston-area consumer prices and 17.5% below grown by the government price index.

Gross state aid went from $288,000 in FY2006 to $415,000 in FY2025, +44.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+391.0%** $18,000 to $91,000 · all towns +54.0%	All fixed costs, FY2016–25 **+205.5%** $92,000 to $280,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Oakham's health insurance would have been $23,000 in FY2025; it was $91,000, $68,000 above the path. Its fixed costs would have been $114,000 in FY2025; it was $280,000, $165,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (+63%) and FY2023 (+81%); health insurance changed by more than 30% in one year in FY2020 (–34%), FY2022 (+73%), FY2023 (+98%) and FY2024 (+30%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Oakham came to $20,000, 27.7% of the $72,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$20,000	27.7%	28.2%
Placed in the town	$20,000	27.7%	42.3%
Everything placed	$20,000	27.7%	45.2%

SCHOOLS

Oakham's required school contribution is 3.2% of

EXPECTED AND ACTUAL

Oakham received $1.3 million in earmarks placed in the town and competitive grants over ten years, 40%

median household income, 32nd highest of 351.

Chapter 70 aid, FY2026 **$1.9M** attributed to the town	Required local contribution **$2.1M** FY2026
Share of household income **3.2%** 32nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Oakham has no school district of its own. Its pupils attend Quabbin and Pathfinder; Oakham accounts for 12% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $3.3 million its size, need and institutions predict.

PEERS

Oakham ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Oakham this town	**61**	**$18,722**	**$794**	**$12.20**	**1.24**	**3.2%**
Cummington peer · lowest in class of 30	49	$9,157	$4,050	$0	1.51	1.5%
Chester peer	61	$16,538	$4,421	$0	2.11	2.4%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Peru peer	61	$22,437	$3,220	$39.68	1.98	2.8%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Orange

Town · Franklin County · 7,573 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Orange Public Schools, the town's own district

Ralph C Mahar Regional School District, shared with New Salem, Petersham and Wendell

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Orange scores 66 on the Fairness Index for all state aid and 81 for discretionary money. Fifty is a fair share.

ALL STATE AID

66 / 100

20th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
72	61	69	64

Rank under other weightings: 15th to 26th.

Stable high: above 55 under every weighting

Orange received more than its share of state aid on all four measures; its blended score of 67 stays between 64 and 69 under every weighting tested.

DISCRETIONARY MONEY ONLY

81 / 100

70th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
85	77	83	80

Rank under other weightings: 62nd to 77th.

Stable high: above 55 under every weighting

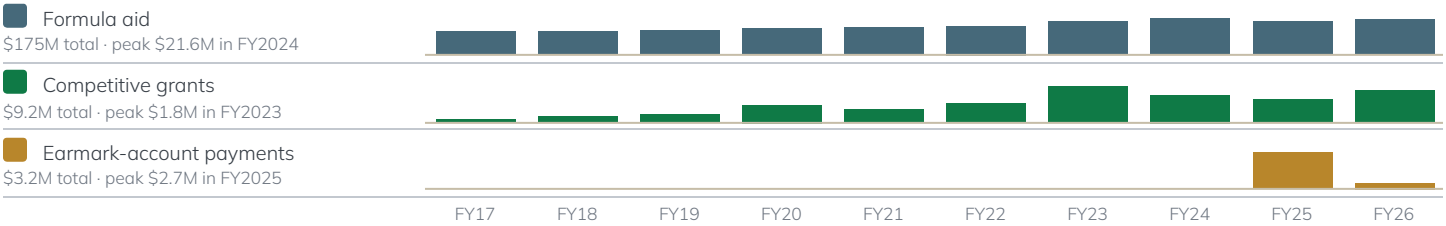
Orange received more than its share of discretionary money on all four measures; its blended score of 81 stays between 79 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Orange's town government and school districts received $175 million in formula aid and $9.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$175M	$9.2M	$3.2M
$23,109 per resident (14th of 351) · gross	$1,214 per resident (66th of 351)	$416 per resident (3rd of 351)

Competitive grants to Orange were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.9 million, are not shown.

EARMARKS

Orange received $485,000 in local earmarks naming the town, $935,000 placed in the town and $935,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$485,000	$935,000	$935,000	Not a member
$64.04 per resident (102nd of 351)	$123 per resident (46th of 351)	$123 per resident (51st of 351)	35 municipalities had none

Placed in the town: 12 clauses in seven of ten budgets; the most recent in FY2026. $485,000 came in clauses that name Orange; the other $450,000 went to organizations based in Orange, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$125,000 (split two ways)	"the Montachusett Regional Transit Authority for the Athol-Orange shuttle, the community transit services successor service, to maintain current…"	Enacted names the town
FY2026	$100,000	"the Quabbin Food Connector, Inc. in the town of Orange"	Enacted names the town
FY2023	$100,000	"the town of Orange for demolition or repairs to unsafe buildings"	Enacted names the town
FY2020	$100,000	"veterans mediation services at Quabbin Mediation, Inc"	Enacted recipient based here
FY2019	$100,000	"the Veterans Mediation program administered by Quabbin Mediation, Inc"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Orange received 2.59 times its proportional share of competitive grant awards.

Local road miles **87.0** 128th of 351 · 11.5 per 1,000 residents (91st of 351)	Town-owned bridges, replacement cost **$21M** scored exposure $5.7M · one in poor condition	Road-stream crossings **97** 123rd of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **35.1 sq mi** 12% state-owned	Seasonal homes **3%** share of housing units	Peak service population **7,847** residents plus seasonal	Core infrastructure index **0.57** roads, culverts, dams, coast, flood, energy

Burden index 2.59; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,527 acres** 11.3% of land area · FY2026	State-owned land PILOT, FY2026 **$125,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$49.56** statewide $117 · FY2026	New growth per resident **$7,716** FY2017–2025 · 343rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 32.7% of Orange's general-fund spending in FY2025, down from 39.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **39.9%** $7.2M of $18M · median town 14.1%	FY2016 **37.8%** $7.3M of $19.3M · median town 12.2%	FY2025 **32.7%** $9.2M of $28.1M · median town 11.5%	Net of state charges, FY2025 **31.1%** FY2010: 39.9% · median town 10.0%

Orange's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $6.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Orange's state aid did not keep pace with either price measure: FY2025 aid was 17.4% below its FY2006 aid grown by Boston-area consumer prices and 26.6% below grown by the government price index.

Gross state aid went from $7.2 million in FY2006 to $9.2 million in FY2025, +28.1% in dollars. Flag: in FY2010, $365,000 of Orange's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+10.0%** $1.9M to $2.1M · all towns +54.0%	All fixed costs, FY2016–25 **+27.0%** $3.2M to $4.1M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Orange's health insurance would have been $2.33 million in FY2025; it was $2.06 million, $277,000 below the path. Its fixed costs would have been $4.05 million in FY2025; it was $4.12 million, $70,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Orange came to $290,000, 154.7% of the $187,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$290,000	154.7%	28.2%
Placed in the town	$740,000	3.9 times	42.3%
Everything placed	$740,000	3.9 times	45.2%

SCHOOLS

Orange's required school contribution is 3.0% of median household income, 84th highest of 351.

Chapter 70 aid, FY2026 **$14M** to the town's district	Required local contribution **$5M** FY2026
Share of household income **3.0%** 84th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+13%** after inflation

Orange runs its own district for some grades and belongs to Ralph C Mahar and Franklin County for others; Orange accounts for 79% and 15% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Orange received $10.7 million in earmarks placed in the town and competitive grants over ten years, 92% of the $11.6 million its size, need and institutions predict.

PEERS

Orange ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Orange this town	**66**	**$23,109**	**$1,214**	**$123**	**2.59**	**3.0%**
Adams peer	64	$19,320	$1,327	$27.87	2.22	2.2%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Ware peer	61	$18,604	$846	$22.39	1.01	2.4%
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Orleans

Town · Barnstable County · 6,415 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Barnstable · Hadley Luddy

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Orleans Public Schools, the town's own district
Nauset Regional School District, shared with Brewster, Eastham and Wellfleet
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Provincetown and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Orleans scores 26 on the Fairness Index for all state aid and 68 for discretionary money. Fifty is a fair share.

ALL STATE AID

26 / 100

343rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
22	25	35	20

Rank under other weightings: 322nd to 345th.

Stable low: below 45 under every weighting

Orleans received less than its share of state aid on all four measures; its blended score of 26 stays between 23 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

68 / 100

118th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
73	76	51	70

Rank under other weightings: 102nd to 128th.

Stable high: above 55 under every weighting

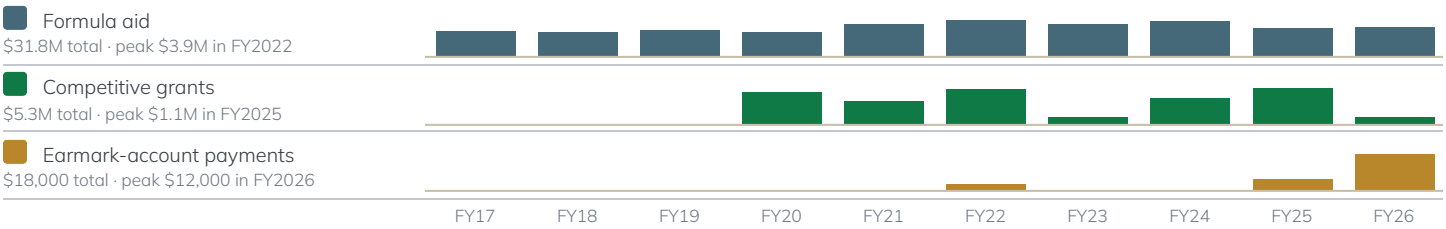
Orleans received more than its share of discretionary money on all four measures; its blended score of 68 stays between 63 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Orleans's town government and school districts received $31.8 million in formula aid and $5.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$31.8M	**$5.3M**	**$18,000**
$4,954 per resident (347th of 351) · gross	$820 per resident (92nd of 351)	$2.86 per resident (307th of 351)

Competitive grants to Orleans peaked in FY2025 at $1.1 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18.2 million, are not shown.

EARMARKS

Orleans received $12,000 in local earmarks naming the town, $737,000 placed in the town and $737,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$12,000	**$737,000**	**$737,000**	**Not a member**
$1.87 per resident (311th of 351)	$115 per resident (51st of 351)	$115 per resident (57th of 351)	35 municipalities had none

Placed in the town: 11 clauses in eight of ten budgets; the most recent in FY2026. $12,000 came in clauses that name Orleans; the other $725,000 went to organizations based in Orleans, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the Lower Cape outreach council for a refrigerator truck and food pantry repairs"	Enacted recipient based here
FY2024	$100,000	"the Homeless Prevention Council, Inc. of Cape Cod"	Enacted recipient based here
FY2023	$100,000	"the Homeless Prevention Council of Cape Cod"	Enacted recipient based here
FY2022	$100,000	"the Homeless Prevention Council of Cape Cod"	Enacted recipient based here
FY2020	$100,000	"the Homeless Prevention Council of Lower Cape Cod"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Orleans received 1.26 times its proportional share of competitive grant awards.

Local road miles **50.1** 253rd of 351 · 7.8 per 1,000 residents (140th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **12** 335th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.2 sq mi** 0% state-owned	Seasonal homes **43%** share of housing units	Peak service population **11,418** residents plus seasonal	Core infrastructure index **1.03** roads, culverts, dams, coast, flood, energy

Burden index 1.26; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$36,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$17,858** statewide $117 · FY2026	New growth per resident **$60,170** FY2017–2025 · 24th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.5% of Orleans's general-fund spending in FY2025, down from 3.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.3%** $717,000 of $21.9M · median town 14.1%	FY2016 **1.8%** $521,000 of $28.8M · median town 12.2%	FY2025 **1.5%** $767,000 of $50.1M · median town 11.5%	Net of state charges, FY2025 **0.3%** FY2010: 0.2% · median town 10.0%

Orleans's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $906,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Orleans's state aid did not keep pace with either price measure: FY2025 aid was 31.0% below its FY2006 aid grown by Boston-area consumer prices and 38.6% below grown by the government price index.

Gross state aid went from $717,000 in FY2006 to $767,000 in FY2025, +7.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.2%** $2.1M to $3.2M · all towns +54.0%	All fixed costs, FY2016–25 **+55.1%** $4.1M to $6.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Orleans's health insurance would have been $2.60 million in FY2025; it was $3.15 million, $549,000 above the path. Its fixed costs would have been $5.11 million in FY2025; it was $6.35 million, $1.24 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Orleans came to $12,000, 1.1% of the $1.07 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$12,000	1.1%	28.2%
Placed in the town	$712,000	66.7%	42.3%
Everything placed	$712,000	66.7%	45.2%

SCHOOLS

Orleans's required school contribution is 1.7% of median household income, 328th highest of 351.

Chapter 70 aid, FY2026 **$1.4M** to the town's district	Required local contribution **$5.3M** FY2026
Share of household income **1.7%** 328th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Orleans runs its own district for some grades and belongs to Nauset and Cape Cod for others; Orleans accounts for 22% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Orleans received $6.5 million in earmarks placed in the town and competitive grants over ten years, 77% of the $8.4 million its size, need and institutions predict.

PEERS

Orleans ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Orleans this town	**26**	**$4,954**	**$820**	**$115**	**1.26**	**1.7%**
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Otis

Town · Berkshire County · 1,624 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Farmington River Regional School District, shared with Sandisfield

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Otis scores 43 on the Fairness Index for all state aid and 92 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

185th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	52	34	49

Rank under other weightings: 153rd to 222nd.

Weighting-dependent: the range crosses the 45–55 band

Otis received less than its share of state aid on three of four measures; its blended score of 43 stays between 38 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

92 / 100

35th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
91	95	88	94

Rank under other weightings: 31st to 39th.

Stable high: above 55 under every weighting

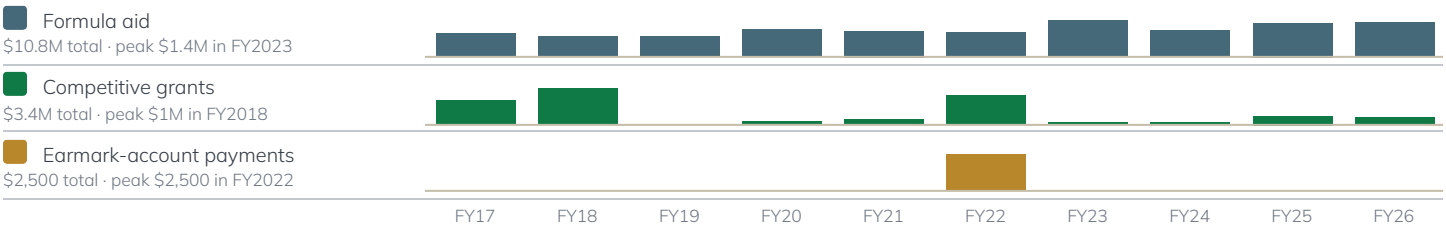
Otis received more than its share of discretionary money on all four measures; its blended score of 92 stays between 90 and 94 under every weighting tested.

STATE MONEY, FY2017–FY2026

Otis's town government and school districts received $10.8 million in formula aid and $3.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$10.8M	$3.4M	$2,500
$6,679 per resident (305th of 351) · gross	$2,109 per resident (43rd of 351)	$1.54 per resident (321st of 351)

Competitive grants to Otis peaked in FY2018 at $1 million, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

No local earmark was placed in Otis in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Otis's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Otis.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Otis's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Truro	$72,000	$222,000	$222,000	$130
Chilmark	$0	$0	$0	$0
New Marlborough	$0	$0	$0	$0
Stockbridge	$163,000	$288,000	$288,000	$140
Monterey	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Otis received about its proportional share of competitive grant awards.

Local road miles **41.9** 285th of 351 · 25.8 per 1,000 residents (48th of 351)	Town-owned bridges, replacement cost **$7.2M** scored exposure $2.3M · one in poor condition	Road-stream crossings **96** 126th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **35.6 sq mi** 29% state-owned	Seasonal homes **51%** share of housing units	Peak service population **3,558** residents plus seasonal	Core infrastructure index **0.64** roads, culverts, dams, coast, flood, energy

Burden index 1.01; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,530 acres** 24.3% of land area · FY2026	State-owned land PILOT, FY2026 **$219,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$39.62** statewide $117 · FY2026	New growth per resident **$27,637** FY2017–2025 · 120th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.0% of Otis's general-fund spending in FY2025, up from 2.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.6%** $95,000 of $3.6M · median town 14.1%	FY2016 **3.3%** $162,000 of $4.9M · median town 12.2%	FY2025 **4.0%** $302,000 of $7.5M · median town 11.5%	Net of state charges, FY2025 **3.6%** FY2010: 1.7% · median town 10.0%

Otis's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $327,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Otis's state aid kept pace with both price measures: FY2025 aid was 104.3% above its FY2006 aid grown by Boston-area consumer prices and 81.6% above grown by the government price index.

Gross state aid went from $95,000 in FY2006 to $302,000 in FY2025, +216.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+3.5%** $226,000 to $233,000 · all towns +54.0%	All fixed costs, FY2016–25 **+35.3%** $438,000 to $592,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Otis's health insurance would have been $282,000 in FY2025; it was $233,000, $48,000 below the path. Its fixed costs would have been $546,000 in FY2025; it was $592,000, $46,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Otis came to $0, 0.0% of the $7,891 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Otis's required school contribution is 2.2% of median household income, 295th highest of 351.

Chapter 70 aid, FY2026 **$407,000** attributed to the town	Required local contribution **$1.6M** FY2026
Share of household income **2.2%** 295th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+44%** after inflation

Otis has no school district of its own. Its pupils attend Farmington River; Otis accounts for 60% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Otis received $3.5 million in earmarks placed in the town and competitive grants over ten years, 84% more than the $1.9 million its size, need and institutions predict.

PEERS

Otis is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Otis this town	**43**	**$6,679**	**$2,109**	**$0**	**1.01**	**2.2%**
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
Chilmark peer · lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%
New Marlborough peer	49	$8,719	$3,098	$0	2.06	2.0%
Stockbridge peer	42	$6,979	$1,448	$140	2.33	1.5%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Oxford

Town · Worcester County · 13,385 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Worcester · Paul K. Frost 51% of residents
18th Worcester · Joseph D. McKenna 49% of residents

Oxford is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Oxford Public Schools, the town's own district
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Paxton, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Oxford scores 52 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

108th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	49	54	52

Rank under other weightings: 94th to 122nd.

Near fair: between 45 and 55 under every weighting

Oxford received more than its share of state aid on three of four measures; its blended score of 52 stays between 51 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

158th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	53	57	55

Rank under other weightings: 153rd to 167th.

Weighting-dependent: the range crosses the 45–55 band

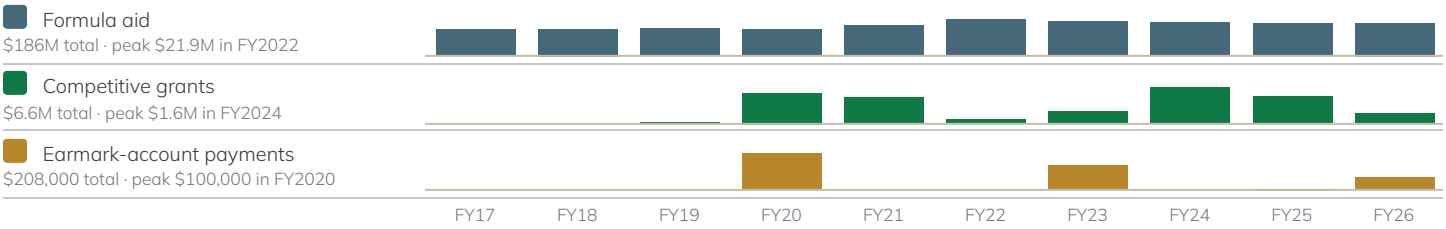
Oxford received more than its share of discretionary money on all four measures; its blended score of 55 stays between 54 and 56 under every weighting tested.

STATE MONEY, FY2017–FY2026

Oxford's town government and school districts received $186 million in formula aid and $6.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$186M	**$6.6M**	**$208,000**
$13,864 per resident (96th of 351) · gross	$491 per resident (139th of 351)	$15.58 per resident (229th of 351)

Competitive grants to Oxford peaked in FY2024 at $1.6 million, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.3 million, are not shown.

EARMARKS

Oxford received $210,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$210,000	**$210,000**	**$210,000**	**Not a member**
$15.69 per resident (279th of 351)	$15.69 per resident (287th of 351)	$15.69 per resident (288th of 351)	35 municipalities had none

Placed in the town: five clauses in three of ten budgets; the most recent in FY2026. Every one names Oxford directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$75,000	"the purchase of public safety communications equipment in the town of Oxford"	Enacted names the town
FY2024	$50,000	"an ADA-compliant ramp to improve accessibility of the town hall in the town of Oxford"	Enacted names the town
FY2026	$35,000	"the town of Oxford for classroom chromebooks, software and security cameras in Oxford public schools"	Enacted names the town
FY2024	$25,000	"improvements and upgrades of the Oxford VFW Post 5663 in the town of Oxford"	Enacted names the town
FY2020	$25,000	"a public safety grant for the town of Oxford"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Oxford received 1.37 times its proportional share of competitive grant awards.

Local road miles **91.8** 117th of 351 · 6.9 per 1,000 residents (162nd of 351)	Town-owned bridges, replacement cost **$15.6M** scored exposure $7.2M · two in poor condition	Road-stream crossings **206** 10th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **26.5 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **13,425** residents plus seasonal	Core infrastructure index **1.72** roads, culverts, dams, coast, flood, energy

Burden index 1.37; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **334 acres** 2.0% of land area · FY2026	State-owned land PILOT, FY2026 **$17,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$50.88** statewide $117 · FY2026	New growth per resident **$15,821** FY2017–2025 · 243rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 30.3% of Oxford's general-fund spending in FY2025, down from 39.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **39.1%** $10.9M of $27.8M · median town 14.1%	FY2016 **35.1%** $12.9M of $36.9M · median town 12.2%	FY2025 **30.3%** $15.1M of $49.7M · median town 11.5%	Net of state charges, FY2025 **28.4%** FY2010: 35.9% · median town 10.0%

Oxford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Oxford's state aid did not keep pace with either price measure: FY2025 aid was 10.5% below its FY2006 aid grown by Boston-area consumer prices and 20.5% below grown by the government price index.

Gross state aid went from $10.9 million in FY2006 to $15.1 million in FY2025, +38.8% in dollars. Flag: in FY2010, $1.1 million of Oxford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+12.0%** $4.3M to $4.9M · all towns +54.0%	All fixed costs, FY2016–25 **+30.8%** $6.9M to $9.1M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Oxford's health insurance would have been $5.41 million in FY2025; it was $4.85 million, $557,000 below the path. Its fixed costs would have been $8.67 million in FY2025; it was $9.08 million, $412,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Oxford came to $175,000, 33.6% of the $521,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$175,000	33.6%	28.2%
Placed in the town	$175,000	33.6%	42.3%
Everything placed	$175,000	33.6%	45.2%

SCHOOLS

Oxford's required school contribution is 2.7% of median household income, 168th highest of 351.

Chapter 70 aid, FY2026 **$13.9M** to the town's district	Required local contribution **$13.8M** FY2026
Share of household income **2.7%** 168th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+9%** after inflation

Oxford runs its own school district and also belongs to Southern Worcester; Oxford accounts for 11% of that district's foundation budget.

EXPECTED AND ACTUAL

Oxford received $6.8 million in earmarks placed in the town and competitive grants over ten years, about the $6.5 million its size, need and institutions predict.

PEERS

Oxford ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Oxford this town	**52**	**$13,864**	**$491**	**$15.69**	**1.37**	**2.7%**
Carver peer · lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Palmer

City · Hampden County · 12,381 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola

STATE SENATE

Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS

Palmer Public Schools, the city's own district

Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, Monson, New Braintree, Oakham, Ware and Warren

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Palmer scores 58 on the Fairness Index for all state aid and 68 for discretionary money. Fifty is a fair share.

ALL STATE AID

58 / 100

57th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	50	62	62

Rank under other weightings: 44th to 76th.

Stable high: above 55 under every weighting

Palmer received more than its share of state aid on three of four measures; its blended score of 58 stays between 56 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

68 / 100

116th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	62	69	72

Rank under other weightings: 104th to 125th.

Stable high: above 55 under every weighting

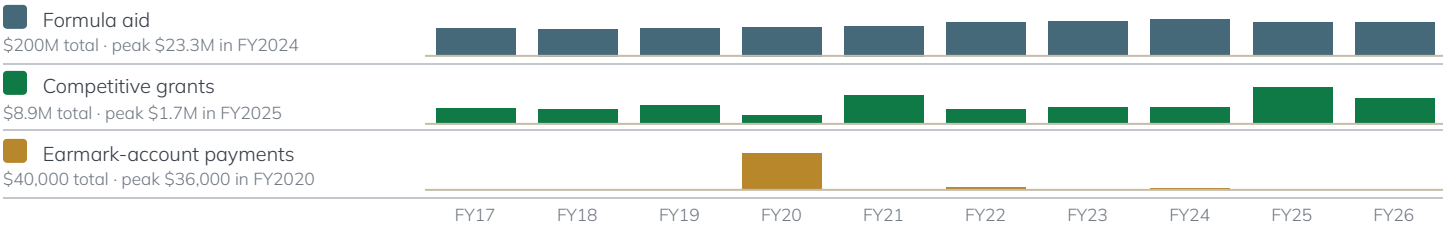
Palmer received more than its share of discretionary money on all four measures; its blended score of 68 stays between 67 and 70 under every weighting tested.

STATE MONEY, FY2017–FY2026

Palmer's town government and school districts received $200 million in formula aid and $8.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$200M	**$8.9M**	**$40,000**
$16,159 per resident (58th of 351) · gross	$720 per resident (110th of 351)	$3.24 per resident (304th of 351)

Competitive grants to Palmer were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.8 million, are not shown.

EARMARKS

Palmer received $225,000 in local earmarks naming the town, $370,000 placed in the town and $370,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	**$370,000**	**$370,000**	**Not a member**
$18.17 per resident (270th of 351)	$29.88 per resident (241st of 351)	$29.88 per resident (241st of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2026. $225,000 came in clauses that name Palmer; the other $145,000 went to organizations based in Palmer, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$75,000	"the town of Palmer for the animal center program to purchase a specialized vehicle"	Enacted names the town
FY2026	$50,000	"Baystate Wing Hospital Corporation in the town of Palmer to ensure health equity by creating open access hours for emergency department mental health…"	Enacted names the town
FY2025	$50,000	"Baystate Wing Hospital Corporation in the town of Palmer to ensure health equity by creating open access hours for emergency department mental health…"	Enacted names the town
FY2023	$50,000	"Baystate Health Eastern Region for a grant program to prevent and treat addiction to opioids and related substances"	Enacted recipient based here
FY2021	$50,000	"Baystate Health Eastern Region for a grant program to prevent and treat addiction to opioid and related substances"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Palmer received 54% of its proportional share of competitive grant awards.

Local road miles **86.8** 129th of 351 · 7.0 per 1,000 residents (158th of 351)	Town-owned bridges, replacement cost **$43.1M** scored exposure $14.5M · 1.5 in poor condition	Road-stream crossings **112** 92nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **31.6 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **12,426** residents plus seasonal	Core infrastructure index **1.31** roads, culverts, dams, coast, flood, energy

Burden index 0.54; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,712 acres** 8.5% of land area · FY2026	State-owned land PILOT, FY2026 **$135,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$78.93** statewide $117 · FY2026	New growth per resident **$8,479** FY2017–2025 · 335th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 38.0% of Palmer's general-fund spending in FY2025, down from 46.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **46.6%** $14.4M of $30.9M · median town 14.1%	FY2016 **40.5%** $13.1M of $32.2M · median town 12.2%	FY2025 **38.0%** $15M of $39.6M · median town 11.5%	Net of state charges, FY2025 **33.7%** FY2010: 45.8% · median town 10.0%

Palmer's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Palmer's state aid did not keep pace with either price measure: FY2025 aid was 32.7% below its FY2006 aid grown by Boston-area consumer prices and 40.2% below grown by the government price index.

Gross state aid went from $14.4 million in FY2006 to $15 million in FY2025, +4.3% in dollars. Flag: in FY2010, $2 million of Palmer's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+2.8%** $4.5M to $4.6M · all towns +54.0%	All fixed costs, FY2016–25 **+39.5%** $6M to $8.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Palmer's health insurance would have been $5.63 million in FY2025; it was $4.64 million, $995,000 below the path. Its fixed costs would have been $7.46 million in FY2025; it was $8.33 million, $870,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Palmer came to $175,000, 137.5% of the $127,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$175,000	137.5%	28.2%
Placed in the town	$295,000	2.3 times	42.3%
Everything placed	$295,000	2.3 times	45.2%

SCHOOLS

Palmer's required school contribution is 2.2% of median household income, 284th highest of 351.

Chapter 70 aid, FY2026 **$14.8M** to the town's district	Required local contribution **$9.7M** FY2026
Share of household income **2.2%** 284th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Palmer runs its own school district and also belongs to Pathfinder; Palmer accounts for 31% of that district's foundation budget.

EXPECTED AND ACTUAL

Palmer received $9.9 million in earmarks placed in the town and competitive grants over ten years, 44% more than the $6.8 million its size, need and institutions predict.

PEERS

Palmer ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Palmer this town	**58**	**$16,159**	**$720**	**$29.88**	**0.54**	**2.2%**
Templeton peer	61	$18,577	$420	$27.27	0.60	2.0%
Spencer peer	59	$16,090	$675	$55.46	0.85	2.5%
Clinton peer	53	$14,443	$344	$28.88	1.51	2.4%
Webster peer	55	$14,621	$927	$27.75	0.46	2.8%
Montague peer	55	$14,528	$1,282	$26.53	2.38	2.7%
Greenfield best in class of 30	53	$14,180	$1,705	$134	4.81	2.9%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Paxton

Town · Worcester County · 5,002 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Worcester · Kimberly N. Ferguson

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Wachusett Regional School District, shared with Holden, Princeton, Rutland and Sterling

Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Oxford, Rutland, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Paxton scores 40 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

214th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	48	38	34

Rank under other weightings: 210th to 230th.

Stable low: below 45 under every weighting

Paxton received less than its share of state aid on all four measures; its blended score of 40 stays between 37 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

325th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
16	21	18	13

Rank under other weightings: 321st to 330th.

Stable low: below 45 under every weighting

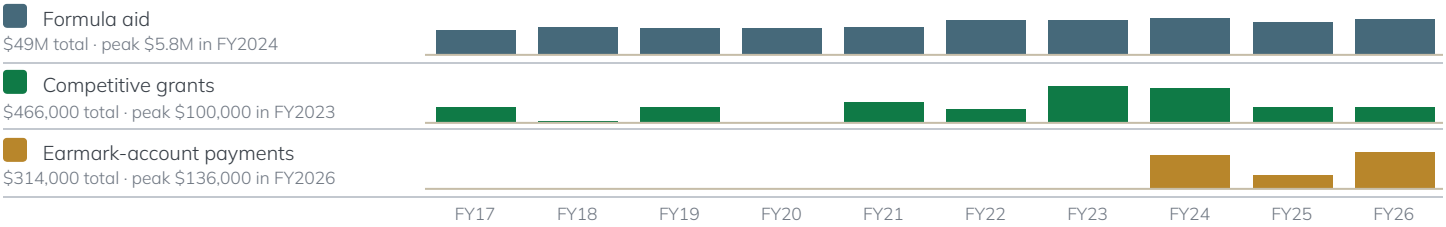
Paxton received less than its share of discretionary money on all four measures; its blended score of 17 stays between 16 and 18 under every weighting tested.

STATE MONEY, FY2017–FY2026

Paxton's town government and school districts received $49 million in formula aid and $466,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$49M	**$466,000**	**$314,000**
$9,789 per resident (185th of 351) · gross	$93.21 per resident (330th of 351)	$62.84 per resident (49th of 351)

Competitive grants to Paxton peaked in FY2023 at $100,000, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.5 million, are not shown.

EARMARKS

Paxton received $215,000 in local earmarks naming the town, $165,000 placed in the town and $215,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$215,000	**$165,000**	**$215,000**	**Not a member**
$42.98 per resident (166th of 351)	$32.99 per resident (225th of 351)	$42.98 per resident (190th of 351)	35 municipalities had none

Placed in the town: six clauses in four of ten budgets; the most recent in FY2026. Every one names Paxton directly.

Names the town includes $50,000 in clauses that name Paxton but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Paxton (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the town of Paxton for wireless internet upgrades and enhancements"	Enacted names the town
FY2024	$50,000	"a design, feasibility and traffic study for a town common or town center in the town of Paxton"	Enacted names the town
FY2024	$27,000	"enhancements to recreation areas in the town of Paxton"	Enacted names the town
FY2026	$25,000	"commercial driver's license training programs in the town of Paxton"	Enacted names the town
FY2022	$8,000	"the American Legion in the town of Paxton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Paxton received 11% of its proportional share of competitive grant awards.

Local road miles **38.7** 297th of 351 · 7.7 per 1,000 residents (142nd of 351)	Town-owned bridges, replacement cost **$1.7M** scored exposure $826,000 · one in poor condition	Road-stream crossings **52** 254th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **14.7 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,002** residents plus seasonal	Core infrastructure index **0.03** roads, culverts, dams, coast, flood, energy

Burden index 0.11; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,043 acres** 11.1% of land area · FY2026	State-owned land PILOT, FY2026 **$143,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$138** statewide $117 · FY2026	New growth per resident **$10,249** FY2017–2025 · 319th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.3% of Paxton's general-fund spending in FY2025, down from 11.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.6%** $1M of $8.7M · median town 14.1%	FY2016 **8.1%** $964,000 of $11.8M · median town 12.2%	FY2025 **5.3%** $845,000 of $16M · median town 11.5%	Net of state charges, FY2025 **5.0%** FY2010: 8.6% · median town 10.0%

Paxton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Paxton's state aid did not keep pace with either price measure: FY2025 aid was 46.0% below its FY2006 aid grown by Boston-area consumer prices and 52.0% below grown by the government price index.

Gross state aid went from $1 million in FY2006 to $845,000 in FY2025, −16.2% in dollars. Flag: in FY2010, $338,000 of Paxton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+28.1%** $449,000 to $575,000 · all towns +54.0%	All fixed costs, FY2016–25 **+112.3%** $783,000 to $1.7M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Paxton's health insurance would have been $560,000 in FY2025; it was $575,000, $15,000 above the path. Its fixed costs would have been $978,000 in FY2025; it was $1.66 million, $685,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Paxton came to $190,000, 150.5% of the $126,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$190,000	150.5%	28.2%
Placed in the town	$140,000	110.9%	42.3%
Everything placed	$190,000	150.5%	45.2%

SCHOOLS

Paxton's required school contribution is 2.5% of median household income, 213th highest of 351.

Chapter 70 aid, FY2026 **$3.5M** attributed to the town	Required local contribution **$5.8M** FY2026
Share of household income **2.5%** 213th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+17%** after inflation

Paxton has no school district of its own. Its pupils attend Wachusett and Southern Worcester; Paxton accounts for 9% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Paxton received $759,000 in earmarks placed in the town and competitive grants over ten years, 35% of the $2.2 million its size, need and institutions predict.

PEERS

Paxton ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Paxton this town	**40**	**$9,789**	**$93.21**	**$32.99**	**0.11**	**2.5%**
Berkley peer	51	$12,903	$95.35	$13.91	0.18	2.7%
Rutland peer	59	$17,290	$124	$22.03	0.61	2.2%
Ashby peer	56	$15,057	$337	$62.29	0.63	2.3%
Southampton peer	49	$11,984	$317	$22.65	1.74	2.9%
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Shutesbury lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Peabody

City · Essex County · 54,695 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Essex · Thomas P. Walsh 83% of residents
13th Essex · Sally P. Kerans 17% of residents

Peabody is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex · Joan B. Lovely

SCHOOL DISTRICTS

Peabody Public Schools, the city's own district
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Peabody scores 39 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

228th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	35	40	44

Rank under other weightings: 196th to 263rd.

Stable low: below 45 under every weighting

Peabody received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

312th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
18	17	21	23

Rank under other weightings: 305th to 322nd.

Stable low: below 45 under every weighting

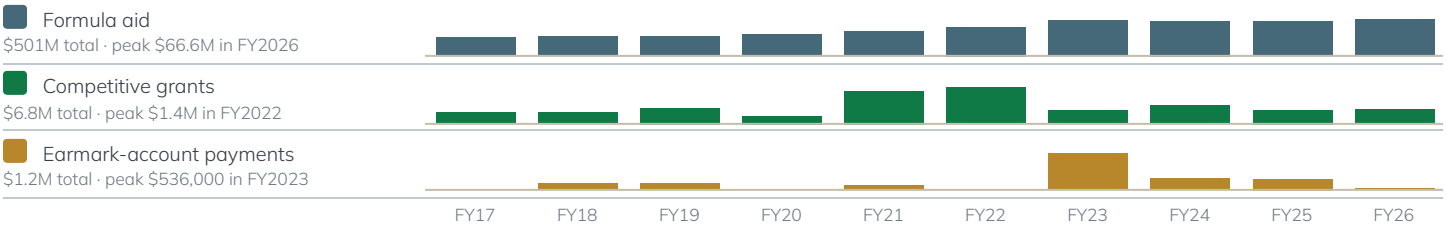
Peabody received less than its share of discretionary money on all four measures; its blended score of 20 stays between 18 and 21 under every weighting tested.

STATE MONEY, FY2017–FY2026

Peabody's town government and school districts received $501 million in formula aid and $6.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$501M	**$6.8M**	**$1.2M**
$9,164 per resident (211th of 351) · gross	$124 per resident (306th of 351)	$21.60 per resident (193rd of 351)

Competitive grants to Peabody peaked in FY2022 at $1.4 million, 20% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $56.7 million, are not shown.

EARMARKS

Peabody received $2.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.1M	**$2.1M**	**$2.1M**	**Not a member**
$37.72 per resident (199th of 351)	$37.72 per resident (213th of 351)	$37.72 per resident (216th of 351)	35 municipalities had none

Placed in the town: 37 clauses in ten of ten budgets; the most recent in FY2026. Every one names Peabody directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$100,000	"the Fidelity Post 1011 Veterans of Foreign Wars of the U.S., Inc. in the city of Peabody for repairs"	Enacted names the town
FY2024	$100,000	"improvements to the Portuguese American War Veterans' Post 1 in the city of Peabody"	Enacted names the town
FY2024	$100,000	"the city of Peabody to provide assistance in planning for the departure of Rousselot Peabody Inc., including, but not limited to, land use planning…"	Enacted names the town
FY2023	$100,000	"the Peabody Children's Museum"	Enacted names the town
FY2022	$100,000	"the lighting and facade improvement of the Lowell street and Route 128 underpass at exit number 39 in the city of Peabody"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Peabody received 34% of its proportional share of competitive grant awards.

Local road miles **161.9** 27th of 351 · 3.0 per 1,000 residents (318th of 351)	Town-owned bridges, replacement cost **$4.8M** scored exposure $393,000 · none in poor condition	Road-stream crossings **149** 41st of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **16.2 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **55,148** residents plus seasonal	Core infrastructure index **0.53** roads, culverts, dams, coast, flood, energy

Burden index 0.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **10 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$19,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,803** statewide $117 · FY2026	New growth per resident **$11,449** FY2017–2025 · 298th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.2% of Peabody's general-fund spending in FY2025, up from 21.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.6%** $27.4M of $127M · median town 14.1%	FY2016 **16.3%** $26.2M of $160M · median town 12.2%	FY2025 **23.2%** $48.1M of $207M · median town 11.5%	Net of state charges, FY2025 **20.8%** FY2010: 14.8% · median town 10.0%

Peabody's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Peabody's state aid kept pace with both price measures: FY2025 aid was 13.2% above its FY2006 aid grown by Boston-area consumer prices and 0.6% above grown by the government price index.

Gross state aid went from $27.4 million in FY2006 to $48.1 million in FY2025, +75.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+20.2%** $23.1M to $27.8M · all towns +54.0%	All fixed costs, FY2016–25 **+31.7%** $34.7M to $45.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Peabody's health insurance would have been $28.8 million in FY2025; it was $27.8 million, $1.09 million below the path. Its fixed costs would have been $43.4 million in FY2025; it was $45.8 million, $2.37 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Peabody came to $1.9 million, 40.0% of the $4.65 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.9M	40.0%	28.2%
Placed in the town	$1.9M	40.0%	42.3%
Everything placed	$1.9M	40.0%	45.2%

SCHOOLS

Peabody's required school contribution is 3.1% of median household income, 60th highest of 351.

Chapter 70 aid, FY2026 **$41.8M** to the town's district	Required local contribution **$66.3M** FY2026
Share of household income **3.1%** 60th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+48%** after inflation

Peabody runs its own school district and also belongs to Essex North Shore; Peabody accounts for 31% of that district's foundation budget.

EXPECTED AND ACTUAL

Peabody received $12.6 million in earmarks placed in the town and competitive grants over ten years, 72% of the $17.6 million its size, need and institutions predict.

PEERS

Peabody ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Peabody this town	**39**	**$9,164**	**$124**	**$37.72**	**0.34**	**3.1%**
Weymouth peer	39	$8,687	$450	$104	2.15	2.8%
Framingham peer	54	$14,513	$248	$157	0.72	3.1%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Pelham

Town · Hampshire County · 1,335 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
7th Hampden · Aaron L. Saunders

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Pelham Public Schools, the town's own district
Amherst-Pelham Regional School District, shared with Amherst, Leverett and Shutesbury

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Pelham scores 47 on the Fairness Index for all state aid and 57 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

149th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	49	45	41

Rank under other weightings: 129th to 165th.

Weighting-dependent: the range crosses the 45–55 band

Pelham received less than its share of state aid on three of four measures; its blended score of 47 stays between 45 and 49 under every weighting tested.

DISCRETIONARY MONEY ONLY

57 / 100

154th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	58	56	51

Rank under other weightings: 146th to 164th.

Weighting-dependent: the range crosses the 45–55 band

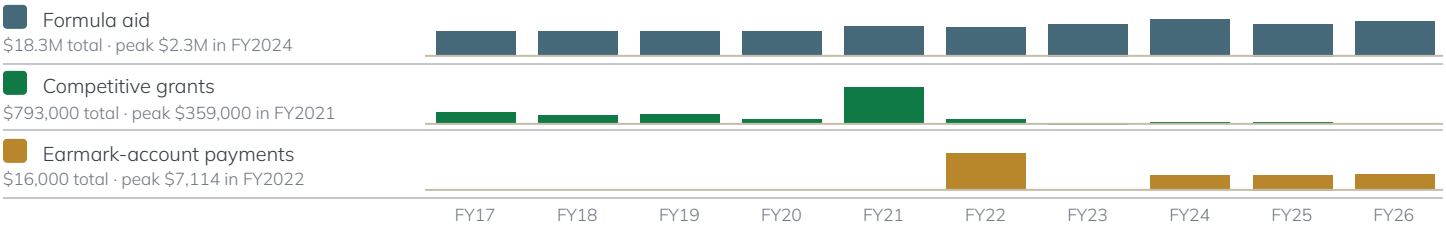
Pelham received more than its share of discretionary money on all four measures; its blended score of 57 stays between 55 and 59 under every weighting tested.

STATE MONEY, FY2017–FY2026

Pelham's town government and school districts received $18.3 million in formula aid and $793,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$18.3M	**$793,000**	**$16,000**
$13,701 per resident (101st of 351) · gross	$594 per resident (123rd of 351)	$11.93 per resident (246th of 351)

Competitive grants to Pelham peaked in FY2021 at $359,000, 45% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $605,000, are not shown.

EARMARKS

Pelham received $16,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$16,000	**$16,000**	**$16,000**	**Not a member**
$11.86 per resident (296th of 351)	$11.86 per resident (304th of 351)	$11.86 per resident (305th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2022. Every one names Pelham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$8,333 (split three ways)	"the development and implementation of a plan for an inter-municipal community choice aggregation 3.0 partnership between Amherst, Pelham, and…"	Enacted names the town
FY2022	$7,500 (split two ways)	"the Amherst senior center to support a physical exercise program for Amherst and Pelham seniors"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Pelham received 2.69 times its proportional share of competitive grant awards.

Local road miles **22.8** 334th of 351 · 17.0 per 1,000 residents (66th of 351)	Town-owned bridges, replacement cost **$5.5M** scored exposure $2M · none in poor condition	Road-stream crossings **47** 275th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **25.1 sq mi** 41% state-owned	Seasonal homes **2%** share of housing units	Peak service population **1,362** residents plus seasonal	Core infrastructure index **3.93** roads, culverts, dams, coast, flood, energy

Burden index 2.69; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,196 acres** 7.4% of land area · FY2026	State-owned land PILOT, FY2026 **$60,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$50.42** statewide $117 · FY2026	New growth per resident **$15,145** FY2017–2025 · 253rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

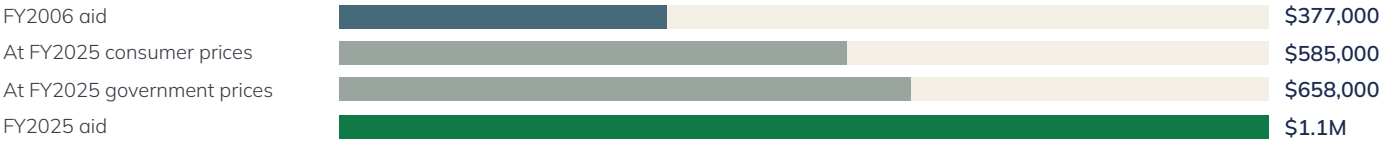
State aid covered 19.9% of Pelham's general-fund spending in FY2025, up from 11.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.1%** $377,000 of $3.4M · median town 14.1%	FY2016 **19.0%** $819,000 of $4.3M · median town 12.2%	FY2025 **19.9%** $1.1M of $5.4M · median town 11.5%	Net of state charges, FY2025 **18.6%** FY2010: 17.2% · median town 10.0%

Pelham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $665,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Pelham's state aid kept pace with both price measures: FY2025 aid was 83.0% above its FY2006 aid grown by Boston-area consumer prices and 62.7% above grown by the government price index.



Gross state aid went from $377,000 in FY2006 to $1.1 million in FY2025, +183.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+61.4%** $126,000 to $204,000 · all towns +54.0%	All fixed costs, FY2016–25 **+74.2%** $357,000 to $622,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Pelham's health insurance would have been $158,000 in FY2025; it was $204,000, $46,000 above the path. Its fixed costs would have been $446,000 in FY2025; it was $622,000, $176,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Pelham came to $16,000, 20.4% of the $77,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$16,000	20.4%	28.2%
Placed in the town	$16,000	20.4%	42.3%
Everything placed	$16,000	20.4%	45.2%

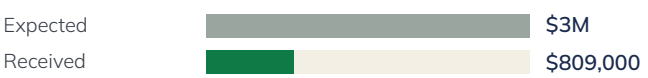
SCHOOLS

Pelham's required school contribution is 2.5% of median household income, 222nd highest of 351.

Chapter 70 aid, FY2026 **$1,000,000** to the town's district	Required local contribution **$1.5M** FY2026
Share of household income **2.5%** 222nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+13%** after inflation

EXPECTED AND ACTUAL

Pelham received $809,000 in earmarks placed in the town and competitive grants over ten years, 27% of the $3 million its size, need and institutions predict.



Pelham runs its own district for some grades and belongs to Amherst-Pelham for others; Pelham accounts for 6% of that district's foundation budget.

PEERS

Pelham ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Pelham this town	**47**	**$13,701**	**$594**	**$11.86**	**2.69**	**2.5%**
Russell peer	73	$25,758	$6,140	$113	1.29	2.4%
Westhampton peer · lowest in class of 30	42	$11,067	$887	$0	0.62	3.3%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Pembroke

Town · Plymouth County · 18,382 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Plymouth · Kenneth P. Sweezey
81% of residents
12th Plymouth · Kathleen R. LaNatra
19% of residents
Pembroke is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Pembroke Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council and Old Colony Planning Council

FAIRNESS INDEX

Pembroke scores 44 on the Fairness Index for all state aid and 12 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100
166th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	54	41	41

Rank under other weightings: 154th to 180th.

Weighting-dependent: the range crosses the 45–55 band

Pembroke received less than its share of state aid on three of four measures; its blended score of 44 stays between 42 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

12 / 100
341st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
10	16	12	10

Rank under other weightings: 340th to 343rd.

Stable low: below 45 under every weighting

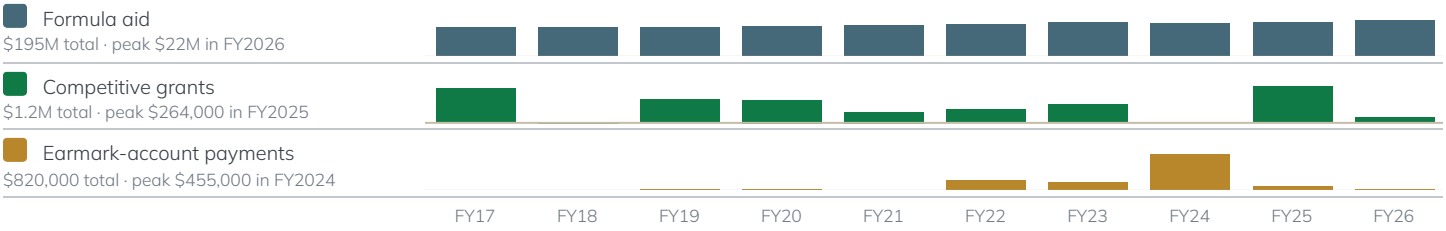
Pembroke received less than its share of discretionary money on all four measures; its blended score of 12 stays between 11 and 13 under every weighting tested.

STATE MONEY, FY2017–FY2026

Pembroke's town government and school districts received $195 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$195M	**$1.2M**	**$820,000**
$10,627 per resident (161st of 351) · gross	$65.81 per resident (341st of 351)	$44.61 per resident (90th of 351)

Competitive grants to Pembroke peaked in FY2025 at $264,000, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.4 million, are not shown.

EARMARKS

Pembroke received $735,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$735,000	**$735,000**	**$735,000**	**Not a member**
$40 per resident (187th of 351)	$40 per resident (202nd of 351)	$40 per resident (205th of 351)	35 municipalities had none

Placed in the town: 22 clauses in eight of ten budgets; the most recent in FY2026. Every one names Pembroke directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$125,000	"improvements at the Mattakeesett street fields complex in the town of Pembroke"	Enacted names the town
FY2025	$53,000	"the town of Pembroke for library repairs"	Enacted names the town
FY2024	$50,000	"the town of Pembroke for local infrastructure improvements"	Enacted names the town
FY2023	$50,000	"improvements at the Mattakeesett street fields complex in the town of Pembroke"	Enacted names the town
FY2018	$50,000	"technology upgrades in the Pembroke Public Schools"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Pembroke received 27% of its proportional share of competitive grant awards.

Local road miles **95.1** 106th of 351 · 5.2 per 1,000 residents (221st of 351)	Town-owned bridges, replacement cost **$1.5M** scored exposure $412,000 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **21.8 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **18,424** residents plus seasonal	Core infrastructure index **0.48** roads, culverts, dams, coast, flood, energy

Burden index 0.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$15,576** FY2017–2025 · 245th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 22.5% of Pembroke's general-fund spending in FY2025, down from 27.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.2%** $10.8M of $39.5M · median town 14.1%	FY2016 **26.9%** $15M of $55.7M · median town 12.2%	FY2025 **22.5%** $17M of $75.6M · median town 11.5%	Net of state charges, FY2025 **20.4%** FY2010: 29.2% · median town 10.0%

Pembroke's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 1.9% above its FY2006 aid grown by Boston-area consumer prices and 9.5% below grown by the government price index.

Gross state aid went from $10.8 million in FY2006 to $17 million in FY2025, +58.0% in dollars. Flag: in FY2010, $476,000 of Pembroke's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+38.6%** $6.4M to $8.9M · all towns +54.0%	All fixed costs, FY2016–25 **+49.0%** $9.9M to $14.8M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Pembroke's health insurance would have been $7.98 million in FY2025; it was $8.86 million, $874,000 above the path. Its fixed costs would have been $12.4 million in FY2025; it was $14.8 million, $2.39 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Pembroke came to $685,000, 27.8% of the $2.46 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$685,000	27.8%	28.2%
Placed in the town	$685,000	27.8%	42.3%
Everything placed	$685,000	27.8%	45.2%

SCHOOLS

Pembroke's required school contribution is 2.6% of median household income, 180th highest of 351.

Chapter 70 aid, FY2026 **$14.6M** to the town's district	Required local contribution **$26.5M** FY2026
Share of household income **2.6%** 180th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+3%** after inflation

Pembroke runs its own school district.

EXPECTED AND ACTUAL

Pembroke received $2 million in earmarks placed in the town and competitive grants over ten years, 42% of the $4.7 million its size, need and institutions predict.

PEERS

Pembroke ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Pembroke this town	**44**	**$10,627**	**$65.81**	**$40.00**	**0.27**	**2.6%**
Uxbridge peer · lowest in class of 30	48	$11,199	$436	$15.55	1.22	2.8%
Swansea peer	40	$9,140	$526	$72.01	1.42	2.6%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Mansfield peer	46	$11,457	$163	$30.37	0.28	3.4%
Tewksbury peer	38	$8,861	$181	$57.89	0.24	2.8%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Pepperell

Town · Middlesex County · 11,663 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale

STATE SENATE

First Middlesex · Vanna Howard (since March 2026) and Edward J. Kennedy (until October 2025)

SCHOOL DISTRICTS

North Middlesex Regional School District, shared with Ashby and Townsend

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Groton, Littleton, Shirley, Townsend and Westford

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Pepperell scores 51 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

116th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	52	50	48

Rank under other weightings: 106th to 124th.

Near fair: between 45 and 55 under every weighting

Pepperell received more than its share of state aid on three of four measures; its blended score of 51 stays between 50 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100

221st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	40	46	36

Rank under other weightings: 206th to 229th.

Stable low: below 45 under every weighting

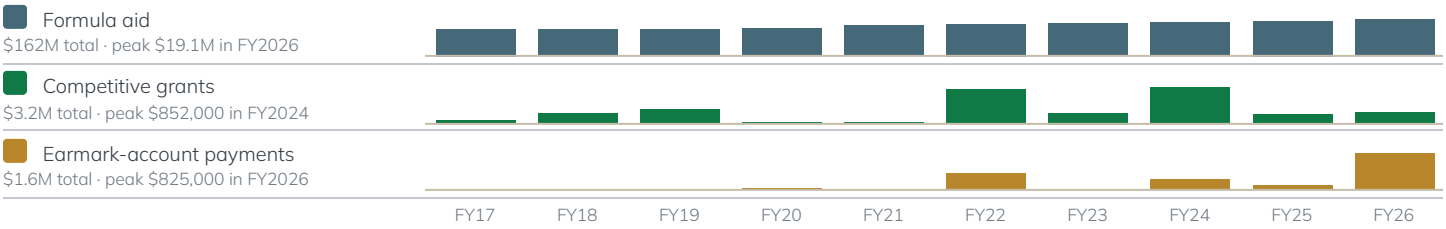
Pepperell received less than its share of discretionary money on all four measures; its blended score of 40 stays between 39 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Pepperell's town government and school districts received $162 million in formula aid and $3.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$162M	$3.2M	$1.6M
$13,867 per resident (95th of 351) · gross	$271 per resident (220th of 351)	$136 per resident (14th of 351)

Competitive grants to Pepperell peaked in FY2024 at $852,000, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.3 million, are not shown.

EARMARKS

Pepperell received $658,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$658,000	$658,000	$658,000	Not a member
$56.38 per resident (127th of 351)	$56.38 per resident (149th of 351)	$56.38 per resident (157th of 351)	35 municipalities had none

Placed in the town: 11 clauses in six of ten budgets; the most recent in FY2026. Every one names Pepperell directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$250,000	"the town of Pepperell for equipment necessary for the regional food hub located at 20 Mill street in the town"	Enacted names the town
FY2026	$75,000	"municipal improvements in the town of Pepperell"	Enacted names the town
FY2025	$75,000	"the town of Pepperell for municipal improvements"	Enacted names the town
FY2023	$60,000	"the town of Pepperell for technology improvements"	Enacted names the town
FY2026	$35,000	"the Pepperell council on aging for new kitchen equipment and security upgrades to the reception area"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Pepperell received 1.79 times its proportional share of competitive grant awards.

Local road miles **83.7** 144th of 351 · 7.2 per 1,000 residents (153rd of 351)	Town-owned bridges, replacement cost **$15.6M** scored exposure $3.2M · two in poor condition	Road-stream crossings **84** 157th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.6 sq mi** 5% state-owned	Seasonal homes **1%** share of housing units	Peak service population **11,773** residents plus seasonal	Core infrastructure index **2.13** roads, culverts, dams, coast, flood, energy

Burden index 1.79; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **564 acres** 3.9% of land area · FY2026	State-owned land PILOT, FY2026 **$77,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$137** statewide $117 · FY2026	New growth per resident **$14,072** FY2017–2025 · 268th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.7% of Pepperell's general-fund spending in FY2025, down from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $1.3M of $16M · median town 14.1%	FY2016 **7.1%** $1.6M of $22.3M · median town 12.2%	FY2025 **5.7%** $2.1M of $35.8M · median town 11.5%	Net of state charges, FY2025 **5.7%** FY2010: 7.4% · median town 10.0%

Pepperell's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $10.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Pepperell's state aid did not keep pace with either price measure: FY2025 aid was 1.4% below its FY2006 aid grown by Boston-area consumer prices and 12.3% below grown by the government price index.

Gross state aid went from $1.3 million in FY2006 to $2.1 million in FY2025, +53.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+94.6%** $643,000 to $1.3M · all towns +54.0%	All fixed costs, FY2016–25 **+97.8%** $1.6M to $3.2M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Pepperell's health insurance would have been $803,000 in FY2025; it was $1.25 million, $448,000 above the path. Its fixed costs would have been $2.00 million in FY2025; it was $3.17 million, $1.17 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Pepperell came to $298,000, 48.9% of the $608,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$298,000	48.9%	28.2%
Placed in the town	$298,000	48.9%	42.3%
Everything placed	$298,000	48.9%	45.2%

SCHOOLS

Pepperell's required school contribution is 2.6% of median household income, 189th highest of 351.

Chapter 70 aid, FY2026 **$11.1M** attributed to the town	Required local contribution **$14M** FY2026
Share of household income **2.6%** 189th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–9%** after inflation

Pepperell has no school district of its own. Its pupils attend North Middlesex and Nashoba Valley; Pepperell accounts for 49% and 20% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Pepperell received $3.9 million in earmarks placed in the town and competitive grants over ten years, 90% of the $4.4 million its size, need and institutions predict.

PEERS

Pepperell ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Pepperell this town	**51**	**$13,867**	**$271**	**$56.38**	**1.79**	**2.6%**
East Longmeadow peer	42	$11,619	$224	$13.70	0.72	3.2%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Somerset peer	47	$11,729	$136	$41.53	0.73	2.4%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Deerfield lowest in class of 30	44	$9,461	$1,195	$6.46	2.83	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Peru

Town · Berkshire County · 630 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Central Berkshire Regional School District, shared with Becket, Cummington, Dalton, Hinsdale, Washington and Windsor

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Peru scores 61 on the Fairness Index for all state aid and 92 for discretionary money. Fifty is a fair share.

ALL STATE AID

61 / 100

39th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
69	72	47	57

Rank under other weightings: 19th to 71st.

Stable high: above 55 under every weighting

Peru received more than its share of state aid on three of four measures; its blended score of 61 stays between 56 and 67 under every weighting tested.

DISCRETIONARY MONEY ONLY

92 / 100

36th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	95	88	90

Rank under other weightings: 33rd to 40th.

Stable high: above 55 under every weighting

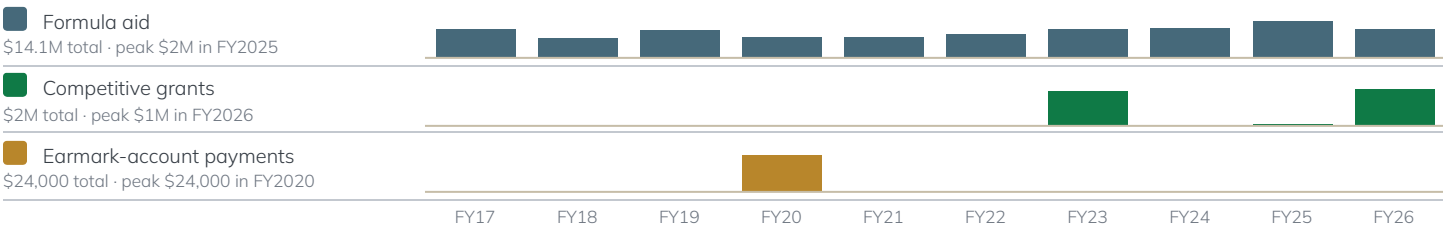
Peru received more than its share of discretionary money on all four measures; its blended score of 92 stays between 90 and 93 under every weighting tested.

STATE MONEY, FY2017–FY2026

Peru's town government and school districts received $14.1 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$14.1M	**$2M**	**$24,000**
$22,437 per resident (16th of 351) · gross	$3,220 per resident (29th of 351)	$37.81 per resident (119th of 351)

Competitive grants to Peru peaked in FY2026 at $1 million, 49% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 630 residents, a single payment moves Peru's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $596,000, are not shown.

EARMARKS

Peru received $25,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$25,000	**$25,000**	**$25,000**	**Not a member**
$39.68 per resident (190th of 351)	$39.68 per resident (204th of 351)	$39.68 per resident (207th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2020. Every one names Peru directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$25,000	"the celebration of the 250th anniversary of the town of Peru"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Peru received 1.98 times its proportional share of competitive grant awards.

Local road miles **35.2** 313th of 351 · 55.9 per 1,000 residents (17th of 351)	Town-owned bridges, replacement cost **$1.1M** scored exposure $277,000 · none in poor condition	Road-stream crossings **27** 320th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **25.9 sq mi** 40% state-owned	Seasonal homes **9%** share of housing units	Peak service population **694** residents plus seasonal	Core infrastructure index **5.10** roads, culverts, dams, coast, flood, energy

Burden index 1.98; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **6,131 acres** 36.9% of land area · FY2026	State-owned land PILOT, FY2026 **$87,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$14.12** statewide $117 · FY2026	New growth per resident **$26,090** FY2017–2025 · 132nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.0% of Peru's general-fund spending in FY2025, up from 11.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $181,000 of $1.6M · median town 14.1%	FY2016 **13.0%** $259,000 of $2M · median town 12.2%	FY2025 **12.0%** $330,000 of $2.8M · median town 11.5%	Net of state charges, FY2025 **12.0%** FY2010: 13.4% · median town 10.0%

Peru's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $742,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Peru's state aid kept pace with both price measures: FY2025 aid was 17.7% above its FY2006 aid grown by Boston-area consumer prices and 4.6% above grown by the government price index.

Gross state aid went from $181,000 in FY2006 to $330,000 in FY2025, +82.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+91.6%** $63,000 to $120,000 · all towns +54.0%	All fixed costs, FY2016–25 **+54.9%** $151,000 to $234,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Peru's health insurance would have been $78,000 in FY2025; it was $120,000, $42,000 above the path. Its fixed costs would have been $189,000 in FY2025; it was $234,000, $45,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2020 (+32%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Peru came to $25,000, 43.5% of the $58,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	43.5%	28.2%
Placed in the town	$25,000	43.5%	42.3%
Everything placed	$25,000	43.5%	45.2%

SCHOOLS

Peru's required school contribution is 2.8% of median

EXPECTED AND ACTUAL

Peru received $2.1 million in earmarks placed in the town and competitive grants over ten years, 56% of the $3.6 million its size, need and institutions predict.

household income, 125th highest of 351.

Chapter 70 aid, FY2026 **$911,000** attributed to the town	Required local contribution **$700,000** FY2026
Share of household income **2.8%** 125th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

Peru has no school district of its own. Its pupils attend Peru and Central Berkshire; Peru accounts for 100% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Peru ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Peru this town	**61**	**$22,437**	**$3,220**	**$39.68**	**1.98**	**2.8%**
Washington peer	56	$15,534	$6,984	$95.06	1.16	2.6%
Cummington peer · lowest in class of 30	49	$9,157	$4,050	$0	1.51	1.5%
Oakham peer	61	$18,722	$794	$12.20	1.24	3.2%
Whately peer	45	$9,968	$1,484	$28.91	1.02	2.4%
Montgomery peer	42	$9,334	$283	$45.37	0.27	2.3%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Petersham

Town · Worcester County · 1,185 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Hampden · Aaron L. Saunders

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Petersham Public Schools, the town's own district

Ralph C Mahar Regional School District, shared with New Salem, Orange and Wendell

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Petersham scores 56 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

75th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	63	39	58

Rank under other weightings: 44th to 106th.

Weighting-dependent: the range crosses the 45–55 band

Petersham received more than its share of state aid on three of four measures; its blended score of 56 stays between 51 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

160th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	61	42	56

Rank under other weightings: 146th to 179th.

Weighting-dependent: the range crosses the 45–55 band

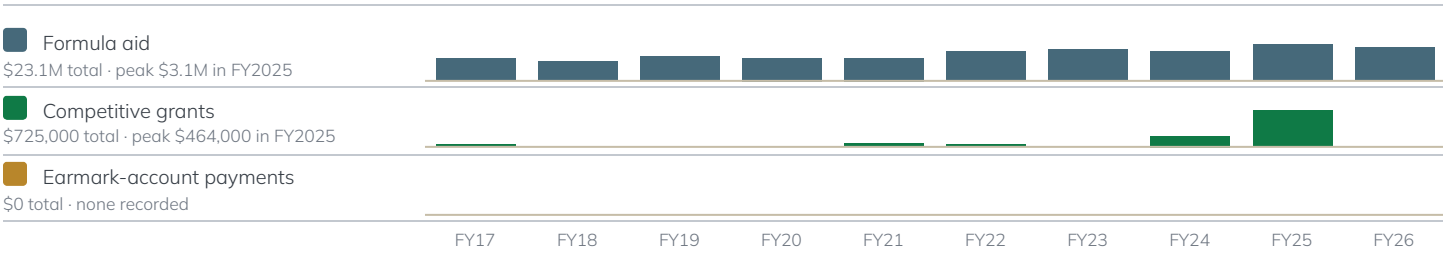
Petersham received more than its share of discretionary money on three of four measures; its blended score of 55 stays between 51 and 59 under every weighting tested.

STATE MONEY, FY2017–FY2026

Petersham's town government and school districts received $23.1 million in formula aid and $725,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$23.1M	**$725,000**	**$0**
$19,509 per resident (29th of 351) · gross	$612 per resident (121st of 351)	$0 per resident (339th of 351)

Competitive grants to Petersham peaked in FY2025 at $464,000, 64% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $844,000, are not shown.

EARMARKS

No local earmark was placed in Petersham in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Petersham's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
New Braintree	$290,000	$290,000	$290,000	$298
Florida	$0	$0	$0	$0
Leyden	$100,000	$100,000	$100,000	$157
Phillipston	$150,000	$150,000	$150,000	$79.16
Pelham	$16,000	$16,000	$16,000	$11.86

WHAT THE TOWN CARRIES

Measured against what it maintains, Petersham received about its proportional share of competitive grant awards.

Local road miles **61.6** 212th of 351 · 52.0 per 1,000 residents (23rd of 351)	Town-owned bridges, replacement cost **$7M** scored exposure $2.5M · three in poor condition	Road-stream crossings **74** 185th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **54.2 sq mi** 36% state-owned	Seasonal homes **7%** share of housing units	Peak service population **1,277** residents plus seasonal	Core infrastructure index **0.38** roads, culverts, dams, coast, flood, energy

Burden index 0.99; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,990 acres** 5.7% of land area · FY2026	State-owned land PILOT, FY2026 **$112,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$56.35** statewide $117 · FY2026	New growth per resident **$21,354** FY2017–2025 · 169th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 21.0% of Petersham's general-fund spending in FY2025, down from 21.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **21.7%** $562,000 of $2.6M · median town 14.1%	FY2016 **27.8%** $990,000 of $3.6M · median town 12.2%	FY2025 **21.0%** $1.1M of $5.4M · median town 11.5%	Net of state charges, FY2025 **20.2%** FY2010: 23.0% · median town 10.0%

Petersham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $526,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Petersham's state aid kept pace with both price measures: FY2025 aid was 30.7% above its FY2006 aid grown by Boston-area consumer prices and 16.2% above grown by the government price index.

Gross state aid went from $562,000 in FY2006 to $1.1 million in FY2025, +102.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+29.4%** $82,000 to $106,000 · all towns +54.0%	All fixed costs, FY2016–25 **+54.9%** $306,000 to $474,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Petersham's health insurance would have been $102,000 in FY2025; it was $106,000, $3,694 above the path. Its fixed costs would have been $382,000 in FY2025; it was $474,000, $92,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2019 (+32%), FY2020 (–54%) and FY2021 (+65%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Petersham came to $0, 0.0% of the $24,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Petersham's required school contribution is 2.7% of median household income, 167th highest of 351.

Chapter 70 aid, FY2026 **$1.2M** to the town's district	Required local contribution **$1.4M** FY2026
Share of household income **2.7%** 167th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Petersham runs its own district for some grades and belongs to Ralph C Mahar and Montachusett for others; Petersham accounts for 9% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Petersham received $779,000 in earmarks placed in the town and competitive grants over ten years, 20% of the $4 million its size, need and institutions predict.

PEERS

Petersham is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Petersham this town	**56**	**$19,509**	**$612**	**$0**	**0.99**	**2.7%**
New Braintree peer · best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Florida peer · lowest in class of 30	64	$19,543	$1,744	$0	0.14	3.2%
Leyden peer	52	$13,247	$3,201	$157	2.17	2.2%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Pelham peer	47	$13,701	$594	$11.86	2.69	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Phillipston

Town · Worcester County · 1,895 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Franklin · Susannah M. Whipps

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Narragansett Regional School District, shared with Templeton
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Phillipston scores 50 on the Fairness Index for all state aid and 82 for discretionary money. Fifty is a fair share.

ALL STATE AID

50 / 100

123rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	50	46	52

Rank under other weightings: 114th to 140th.

Near fair: between 45 and 55 under every weighting

Phillipston received less than its share of state aid on two of four measures; its blended score of 50 stays between 48 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

82 / 100

65th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	82	81	83

Rank under other weightings: 63rd to 67th.

Stable high: above 55 under every weighting

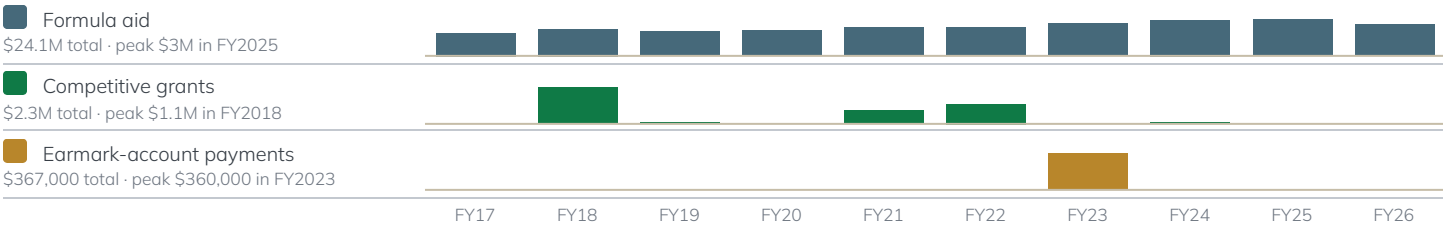
Phillipston received more than its share of discretionary money on all four measures; its blended score of 82 stays between 82 and 83 under every weighting tested.

STATE MONEY, FY2017–FY2026

Phillipston's town government and school districts received $24.1 million in formula aid and $2.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$24.1M	**$2.3M**	**$367,000**
$12,743 per resident (116th of 351) · gross	$1,191 per resident (68th of 351)	$194 per resident (6th of 351)

Competitive grants to Phillipston peaked in FY2018 at $1.1 million, 49% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.3 million, are not shown.

EARMARKS

Phillipston received $150,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$150,000	**$150,000**	**$150,000**	**Not a member**
$79.16 per resident (75th of 351)	$79.16 per resident (100th of 351)	$79.16 per resident (106th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Phillipston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$100,000	"repairs to the state highway route 101 bridge in the town of Phillipston"	Enacted names the town
FY2025	$50,000	"paving needs in the town of Phillipston"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Phillipston received 1.39 times its proportional share of competitive grant awards.

Local road miles **44.8** 269th of 351 · 23.6 per 1,000 residents (50th of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $258,000 · none in poor condition	Road-stream crossings **49** 266th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **24.3 sq mi** 29% state-owned	Seasonal homes **17%** share of housing units	Peak service population **2,290** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 1.39; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,784 acres** 24.4% of land area · FY2026	State-owned land PILOT, FY2026 **$83,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$22.04** statewide $117 · FY2026	New growth per resident **$17,050** FY2017–2025 · 225th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.0% of Phillipston's general-fund spending in FY2025, down from 9.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.7%** $203,000 of $2.1M · median town 14.1%	FY2016 **6.5%** $240,000 of $3.7M · median town 12.2%	FY2025 **6.0%** $324,000 of $5.4M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 6.5% · median town 10.0%

Phillipston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Phillipston's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 2.7% above its FY2006 aid grown by Boston-area consumer prices and 8.7% below grown by the government price index.

Gross state aid went from $203,000 in FY2006 to $324,000 in FY2025, +59.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+139.8%** $65,000 to $156,000 · all towns +54.0%	All fixed costs, FY2016–25 **+80.8%** $187,000 to $338,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Phillipston's health insurance would have been $81,000 in FY2025; it was $156,000, $75,000 above the path. Its fixed costs would have been $233,000 in FY2025; it was $338,000, $104,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2018 (+35%), FY2021 (+42%) and FY2023 (+48%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Phillipston came to $150,000, 165.0% of the $91,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$150,000	165.0%	28.2%
Placed in the town	$150,000	165.0%	42.3%
Everything placed	$150,000	165.0%	45.2%

SCHOOLS

Phillipston's required school contribution is 2.9% of

EXPECTED AND ACTUAL

Phillipston received $2.4 million in earmarks placed in the town and competitive grants over ten years, 85%

median household income, 101st highest of 351.

Chapter 70 aid, FY2026 **$1.7M** attributed to the town	Required local contribution **$1.9M** FY2026
Share of household income **2.9%** 101st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+0%** after inflation

Phillipston has no school district of its own. Its pupils attend Narragansett and Montachusett; Phillipston accounts for 15% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $2.8 million its size, need and institutions predict.

PEERS

Phillipston ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Phillipston this town	**50**	**$12,743**	**$1,191**	**$79.16**	**1.39**	**2.9%**
Holland peer	45	$10,480	$1,150	$38.71	0.46	2.7%
Lanesborough peer · lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
Bernardston peer	55	$15,799	$1,227	$0	0.44	2.9%
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Pittsfield

City · Berkshire County · 43,457 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Berkshire · Tricia Farley-Bouvier

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Pittsfield Public Schools, the city's own district

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Pittsfield scores 59 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

52nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	49	61	64

Rank under other weightings: 40th to 70th.

Stable high: above 55 under every weighting

Pittsfield received more than its share of state aid on three of four measures; its blended score of 59 stays between 57 and 61 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

177th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	42	52	58

Rank under other weightings: 162nd to 188th.

Near fair: between 45 and 55 under every weighting

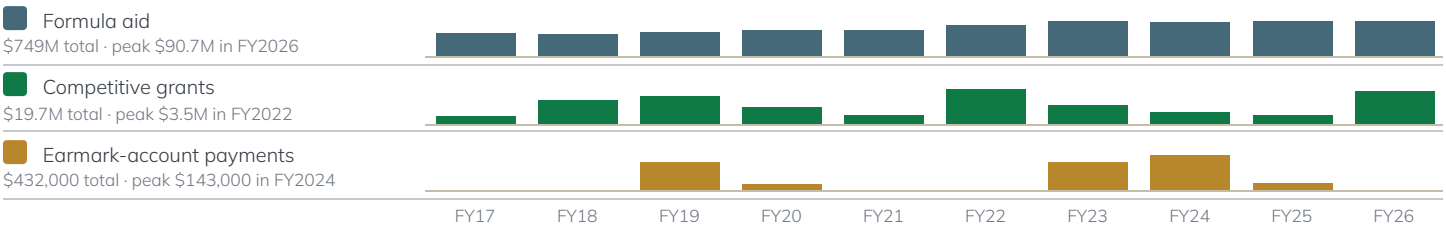
Pittsfield received more than its share of discretionary money on three of four measures; its blended score of 52 stays between 49 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Pittsfield's town government and school districts received $749 million in formula aid and $19.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$749M	$19.7M	$432,000
$17,230 per resident (48th of 351) · gross	$454 per resident (151st of 351)	$9.95 per resident (260th of 351)

Competitive grants to Pittsfield were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $61.1 million, are not shown.

EARMARKS

Pittsfield received $1.2 million in local earmarks naming the town, $5.7 million placed in the town and $5.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$5.7M	$5.7M	Not a member
$27.18 per resident (241st of 351)	$131 per resident (40th of 351)	$131 per resident (44th of 351)	35 municipalities had none

Placed in the town: 65 clauses in ten of ten budgets; the most recent in FY2026. $1.2 million came in clauses that name Pittsfield; the other $4.5 million went to organizations based in Pittsfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$350,000	"the Berkshire Flyer for continued operations"	Enacted recipient based here
FY2020	$270,000	"the pilot season of the Berkshire Flyer, a weekend passenger rail service connecting New York city and the Berkshires between Memorial Day and…"	Enacted recipient based here
FY2026	$200,000	"the Berkshire county opioid education and awareness task force"	Enacted recipient based here
FY2025	$200,000	"the Berkshire county opioid education and awareness task force"	Enacted recipient based here
FY2024	$200,000	"the Berkshire county opioid education and awareness task force"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Pittsfield received 1.56 times its proportional share of competitive grant awards.

Local road miles **196.2** 17th of 351 · 4.5 per 1,000 residents (259th of 351)	Town-owned bridges, replacement cost **$88.8M** scored exposure $30.6M · ten in poor condition	Road-stream crossings **180** 20th of 351 · culverts and small crossings	Town-owned hazard dams **6** high or significant hazard
Land area **40.5 sq mi** 9% state-owned	Seasonal homes **2%** share of housing units	Peak service population **44,188** residents plus seasonal	Core infrastructure index **0.87** roads, culverts, dams, coast, flood, energy

Burden index 1.56; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,481 acres** 9.6% of land area · FY2026	State-owned land PILOT, FY2026 **$157,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$63.17** statewide $117 · FY2026	New growth per resident **$10,974** FY2017–2025 · 307th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 37.5% of Pittsfield's general-fund spending in FY2025, down from 38.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **38.9%** $40.5M of $104M · median town 14.1%	FY2016 **37.8%** $53.1M of $141M · median town 12.2%	FY2025 **37.5%** $76.5M of $204M · median town 11.5%	Net of state charges, FY2025 **33.2%** FY2010: 37.4% · median town 10.0%

Pittsfield's state aid kept pace with both price measures: FY2025 aid was 22.0% above its FY2006 aid grown by Boston-area consumer prices and 8.4% above grown by the government price index.

Gross state aid went from $40.5 million in FY2006 to $76.5 million in FY2025, +89.2% in dollars. Flag: in FY2010, $3.2 million of Pittsfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+53.7%** $20.6M to $31.6M · all towns +54.0%	All fixed costs, FY2016–25 **+55.0%** $33.7M to $52.2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Pittsfield's health insurance would have been $25.7 million in FY2025; it was $31.6 million, $5.93 million above the path. Its fixed costs would have been $42.1 million in FY2025; it was $52.2 million, $10.2 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Pittsfield came to $940,000, 8.5% of the $11 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$940,000	8.5%	28.2%
Placed in the town	$4.9M	44.6%	42.3%
Everything placed	$4.9M	44.6%	45.2%

SCHOOLS

Pittsfield's required school contribution is 2.6% of median household income, 198th highest of 351.

Chapter 70 aid, FY2026 **$68.5M** to the town's district	Required local contribution **$35.6M** FY2026
Share of household income **2.6%** 198th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Pittsfield runs its own school district.

EXPECTED AND ACTUAL

Pittsfield received $33.5 million in earmarks placed in the town and competitive grants over ten years, 93% of the $36.1 million its size, need and institutions predict.

PEERS

Pittsfield ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Pittsfield this town	**59**	**$17,230**	**$454**	**$131**	**1.56**	**2.6%**
Chelsea peer	77	$32,370	$919	$147	3.69	2.6%
Fitchburg peer	68	$22,494	$765	$118	2.33	2.1%
Holyoke peer	78	$31,543	$801	$93.22	1.95	1.7%
Chicopee peer · lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%
Amherst peer	36	$8,017	$722	$84.88	2.44	3.7%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Plainfield

Town · Hampshire County · 616 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Hampshire · Lindsay N. Sabadosa

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Mohawk Trail Regional School District, shared with Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath and Shelburne

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Plainfield scores 52 on the Fairness Index for all state aid and 93 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

103rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	54	50	45

Rank under other weightings: 79th to 125th.

Weighting-dependent: the range crosses the 45–55 band

Plainfield received less than its share of state aid on two of four measures; its blended score of 52 stays between 49 and 56 under every weighting tested.

DISCRETIONARY MONEY ONLY

93 / 100

31st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	94	90	92

Rank under other weightings: 26th to 35th.

Stable high: above 55 under every weighting

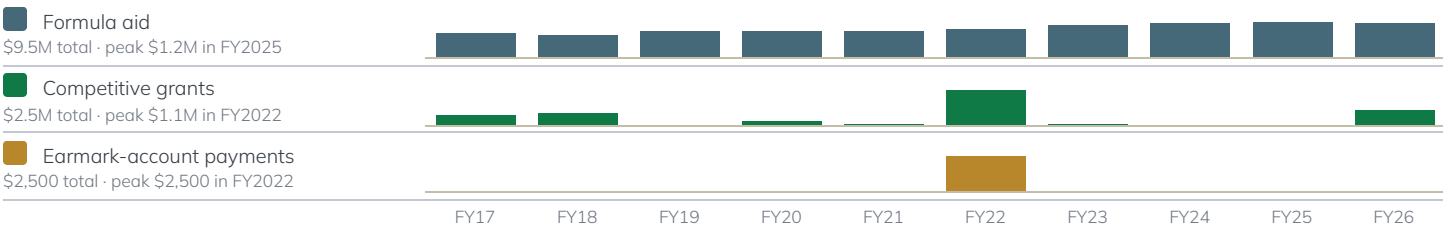
Plainfield received more than its share of discretionary money on all four measures; its blended score of 93 stays between 92 and 94 under every weighting tested.

STATE MONEY, FY2017–FY2026

Plainfield's town government and school districts received $9.5 million in formula aid and $2.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$9.5M	$2.5M	$2,500
$15,369 per resident (70th of 351) · gross	$4,077 per resident (20th of 351)	$4.06 per resident (299th of 351)

Competitive grants to Plainfield peaked in FY2022 at $1.1 million, 42% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 616 residents, a single payment moves Plainfield's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $607,000, are not shown.

EARMARKS

No local earmark was placed in Plainfield in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Plainfield's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Plainfield.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Plainfield's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
New Salem	$106,000	$106,000	$106,000	$101
Charlemont	$165,000	$165,000	$165,000	$148
Wendell	$90,000	$90,000	$90,000	$106
Savoy	$0	$0	$0	$0
Shelburne	$185,000	$285,000	$285,000	$182

WHAT THE TOWN CARRIES

Measured against what it maintains, Plainfield received 1.79 times its proportional share of competitive grant awards.

Local road miles **47.3** 264th of 351 · 76.8 per 1,000 residents (8th of 351)	Town-owned bridges, replacement cost **$3.6M** scored exposure $986,000 · none in poor condition	Road-stream crossings **45** 283rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **21.1 sq mi** 13% state-owned	Seasonal homes **6%** share of housing units	Peak service population **658** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 1.79; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,830 acres** 13.5% of land area · FY2026	State-owned land PILOT, FY2026 **$82,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$44.64** statewide $117 · FY2026	New growth per resident **$66,801** FY2017–2025 · 19th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.6% of Plainfield's general-fund spending in FY2025, down from 7.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.2%** $82,000 of $1.1M · median town 14.1%	FY2016 **6.8%** $117,000 of $1.7M · median town 12.2%	FY2025 **5.6%** $188,000 of $3.4M · median town 11.5%	Net of state charges, FY2025 **5.5%** FY2010: 7.4% · median town 10.0%

Plainfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $411,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Plainfield's state aid kept pace with both price measures: FY2025 aid was 48.1% above its FY2006 aid grown by Boston-area consumer prices and 31.6% above grown by the government price index.

Gross state aid went from $82,000 in FY2006 to $188,000 in FY2025, +129.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–27.1%** $52,000 to $38,000 · all towns +54.0%	All fixed costs, FY2016–25 **+49.8%** $160,000 to $240,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Plainfield's health insurance would have been $64,000 in FY2025; it was $38,000, $27,000 below the path. Its fixed costs would have been $200,000 in FY2025; it was $240,000, $40,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (–33%); fixed costs changed by more than 30% in one year in FY2024 (+52%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Plainfield's reported health insurance fell from $52,000 in FY2016 to $38,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Plainfield's required school contribution is 4.5% of median household income, 3rd highest of 351.

Chapter 70 aid, FY2026 **$503,000** attributed to the town	Required local contribution **$705,000** FY2026
Share of household income **4.5%** 3rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Plainfield has no school district of its own. Its pupils attend Plainfield and Mohawk Trail; Plainfield accounts for 100% and 8% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Plainfield received $2.5 million in earmarks placed in the town and competitive grants over ten years, 55% of the $4.5 million its size, need and institutions predict.

PEERS

Plainfield is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Plainfield this town	**52**	**$15,369**	**$4,077**	**$0**	**1.79**	**4.5%**
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
Charlemont peer	64	$19,209	$6,110	$148	2.68	3.8%
Wendell peer	65	$24,634	$5,863	$106	0.54	3.0%
Savoy peer · lowest in class of 30	57	$18,956	$1,027	$0	1.10	2.7%
Shelburne peer	66	$14,126	$8,461	$182	2.94	3.0%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Plainville

Town · Norfolk County · 9,943 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Norfolk · Marcus S. Vaughn

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Plainville Public Schools, the town's own district
King Philip Regional School District, shared with Norfolk and Wrentham
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, North Attleborough, Seekonk, Sherborn and two others

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Plainville scores 39 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

227th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	38	38	41

Rank under other weightings: 204th to 252nd.

Stable low: below 45 under every weighting

Plainville received less than its share of state aid on all four measures; its blended score of 39 stays between 39 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

288th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	24	26	27

Rank under other weightings: 278th to 298th.

Stable low: below 45 under every weighting

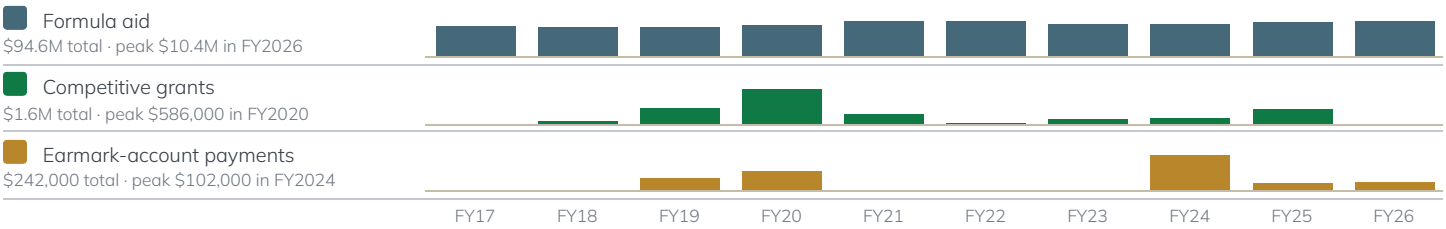
Plainville received less than its share of discretionary money on all four measures; its blended score of 25 stays between 24 and 26 under every weighting tested.

STATE MONEY, FY2017–FY2026

Plainville's town government and school districts received $94.6 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$94.6M	$1.6M	$242,000
$9,512 per resident (194th of 351) · gross	$160 per resident (275th of 351)	$24.37 per resident (178th of 351)

Competitive grants to Plainville peaked in FY2020 at $586,000, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.6 million, are not shown.

EARMARKS

Plainville received $408,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$408,000	$408,000	$408,000	Not a member
$41.02 per resident (181st of 351)	$41.02 per resident (200th of 351)	$41.02 per resident (203rd of 351)	35 municipalities had none

Placed in the town: 14 clauses in eight of ten budgets; the most recent in FY2026. Every one names Plainville directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the installation of upgraded water meters in the town of Plainville"	Enacted names the town
FY2023	$50,000	"a new water pumping and treatment station to access a new water source in the town of Plainville"	Enacted names the town
FY2017	$50,000	"the town of Plainville for public safety improvements"	Enacted names the town
FY2024	$45,000	"portable radio replacements and upgrades in the fire department in the town of Plainville"	Enacted names the town
FY2020	$30,000	"the town of Plainville for improvements to municipal networking and information technology infrastructure and security including, but not limited to…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Plainville received 68% of its proportional share of competitive grant awards.

Local road miles **49.1** 257th of 351 · 4.9 per 1,000 residents (237th of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $420,000 · one in poor condition	Road-stream crossings **42** 288th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **11.0 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **9,943** residents plus seasonal	Core infrastructure index **1.07** roads, culverts, dams, coast, flood, energy

Burden index 0.68; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **70 acres** 1.0% of land area · FY2026	State-owned land PILOT, FY2026 **$51,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$728** statewide $117 · FY2026	New growth per resident **$44,973** FY2017–2025 · 45th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.0% of Plainville's general-fund spending in FY2025, down from 23.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **23.8%** $4.7M of $19.8M · median town 14.1%	FY2016 **14.9%** $4.3M of $29.2M · median town 12.2%	FY2025 **10.0%** $4.4M of $44.4M · median town 11.5%	Net of state charges, FY2025 **7.7%** FY2010: 18.8% · median town 10.0%

Plainville's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Plainville's state aid did not keep pace with either price measure: FY2025 aid was 39.5% below its FY2006 aid grown by Boston-area consumer prices and 46.2% below grown by the government price index.

Gross state aid went from $4.7 million in FY2006 to $4.4 million in FY2025, –6.1% in dollars. Flag: in FY2010, $1.1 million of Plainville's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+69.5%** $2.1M to $3.5M · all towns +54.0%	All fixed costs, FY2016–25 **+79.0%** $3.5M to $6.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Plainville's health insurance would have been $2.58 million in FY2025; it was $3.50 million, $922,000 above the path. Its fixed costs would have been $4.38 million in FY2025; it was $6.27 million, $1.90 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+55%); health insurance changed by more than 30% in one year in FY2024 (+133%) and FY2025 (–37%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Plainville came to $383,000, 26.7% of the $1.44 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$383,000	26.7%	28.2%
Placed in the town	$383,000	26.7%	42.3%
Everything placed	$383,000	26.7%	45.2%

SCHOOLS

Plainville's required school contribution is 3.3% of median household income, 29th highest of 351.

Chapter 70 aid, FY2026 **$6.2M** to the town's district	Required local contribution **$14.4M** FY2026
Share of household income **3.3%** 29th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–15%** after inflation

Plainville runs its own district for some grades and belongs to King Philip, Tri County and Norfolk County for others; Plainville accounts for 26%, 11% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Plainville received $2 million in earmarks placed in the town and competitive grants over ten years, 45% of the $4.4 million its size, need and institutions predict.

PEERS

Plainville ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Plainville this town	**39**	**$9,512**	**$160**	**$41.02**	**0.68**	**3.3%**
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
West Boylston peer	35	$8,612	$157	$148	0.30	3.0%
Great Barrington peer	42	$9,461	$2,113	$175	2.92	3.7%
Merrimac peer	47	$12,597	$215	$48.54	1.78	2.5%
Salisbury peer	38	$7,912	$1,047	$37.77	1.32	2.7%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Sheffield lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Plymouth

Town · Plymouth County · 63,953 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Plymouth · Michelle L. Badger
72% of residents
12th Plymouth · Kathleen R. LaNatra
28% of residents
Plymouth is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Plymouth Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Plymouth scores 28 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100
321st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	33	31	22

Rank under other weightings: 306th to 331st.

Stable low: below 45 under every weighting

Plymouth received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100
233rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	43	39	30

Rank under other weightings: 225th to 240th.

Stable low: below 45 under every weighting

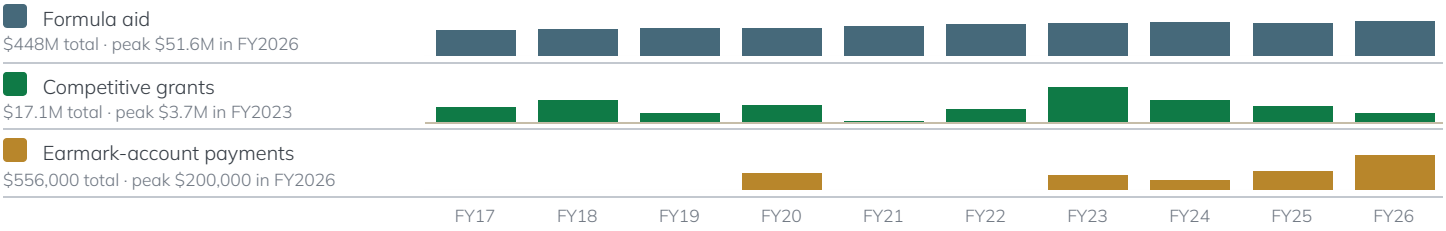
Plymouth received less than its share of discretionary money on all four measures; its blended score of 37 stays between 35 and 40 under every weighting tested.

STATE MONEY, FY2017–FY2026

Plymouth's town government and school districts received $448 million in formula aid and $17.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$448M	$17.1M	$556,000
$7,006 per resident (289th of 351) · gross	$268 per resident (222nd of 351)	$8.70 per resident (266th of 351)

Competitive grants to Plymouth peaked in FY2023 at $3.7 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $76.3 million, are not shown.

EARMARKS

Plymouth received $2.7 million in local earmarks naming the town, $3.4 million placed in the town and $3.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.7M	$3.4M	$3.5M	Not a member
$41.57 per resident (176th of 351)	$53.91 per resident (158th of 351)	$55.26 per resident (159th of 351)	35 municipalities had none

Placed in the town: 51 clauses in nine of ten budgets; the most recent in FY2026. $2.6 million came in clauses that name Plymouth; the other $875,000 went to organizations based in Plymouth, some of which serve a wider area.

Names the town includes $86,000 in clauses that name Plymouth but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $86,000 in one clause for state facilities located in Plymouth (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$500,000	"Plymouth 400, Inc. for its 400th commemoration of the landing of the Mayflower in 1620 and the founding of Plymouth Colony"	Enacted names the town
FY2019	$250,000	"Plymouth 400, Inc. for the commemoration of the 400th anniversary of the founding of Plymouth"	Enacted names the town
FY2018	$200,000	"Plymouth 400, Inc. for the commemoration of the 400th anniversary of the founding of the United States"	Enacted names the town
FY2017	$200,000	"Plymouth 400, Inc. for the commemoration of the four-hundredth anniversary of the founding of the United States"	Enacted names the town
FY2023	$150,000	"the Plymouth housing authority for the repair and renovation of affordable housing in the town of Plymouth"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Plymouth received 73% of its proportional share of competitive grant awards.

Local road miles **236.6** 9th of 351 · 3.7 per 1,000 residents (291st of 351)	Town-owned bridges, replacement cost **$8.6M** scored exposure $1.2M · none in poor condition	Road-stream crossings **236** 5th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **96.4 sq mi** 20% state-owned	Seasonal homes **6%** share of housing units	Peak service population **68,062** residents plus seasonal	Core infrastructure index **1.66** roads, culverts, dams, coast, flood, energy

Burden index 0.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **12,491 acres** 20.2% of land area · FY2026	State-owned land PILOT, FY2026 **$1.3M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$108** statewide $117 · FY2026	New growth per resident **$38,723** FY2017–2025 · 60th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.7% of Plymouth's general-fund spending in FY2025, down from 18.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.2%** $24M of $132M · median town 14.1%	FY2016 **14.7%** $32M of $218M · median town 12.2%	FY2025 **12.7%** $37.1M of $291M · median town 11.5%	Net of state charges, FY2025 **9.2%** FY2010: 14.8% · median town 10.0%

Plymouth's state aid did not keep pace with either price measure: FY2025 aid was 0.2% below its FY2006 aid grown by Boston-area consumer prices and 11.3% below grown by the government price index.

Gross state aid went from $24 million in FY2006 to $37.1 million in FY2025, +54.7% in dollars. Flag: in FY2010, $1.7 million of Plymouth's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.5%** $37.1M to $51.8M · all towns +54.0%	All fixed costs, FY2016–25 **+29.9%** $53.9M to $70.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Plymouth's health insurance would have been $46.4 million in FY2025; it was $51.8 million, $5.41 million above the path. Its fixed costs would have been $67.4 million in FY2025; it was $70.1 million, $2.69 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Plymouth came to $2.4 million, 16.3% of the $14.7 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.4M	16.3%	28.2%
Placed in the town	$3.1M	21.4%	42.3%
Everything placed	$3.2M	22.0%	45.2%

SCHOOLS

Plymouth's required school contribution is 3.0% of median household income, 79th highest of 351.

Chapter 70 aid, FY2026 **$30.2M** to the town's district	Required local contribution **$92.9M** FY2026
Share of household income **3.0%** 79th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+0%** after inflation

Plymouth runs its own school district.

EXPECTED AND ACTUAL

Plymouth received $21.8 million in earmarks placed in the town and competitive grants over ten years, 8% more than the $20.1 million its size, need and institutions predict.

PEERS

Plymouth ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Plymouth this town	**28**	**$7,006**	**$268**	**$53.91**	**0.73**	**3.0%**
Medford peer	32	$6,237	$331	$49.53	2.03	1.9%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Braintree peer	39	$9,109	$142	$117	0.55	3.4%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Plympton

Town · Plymouth County · 2,935 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
12th Plymouth · Kathleen R. LaNatra

STATE SENATE
Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS
Plympton Public Schools, the town's own district
Silver Lake Regional School District, shared with Halifax and Kingston

REGIONAL PLANNING AGENCY
Old Colony Planning Council

FAIRNESS INDEX

Plympton scores 35 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

257th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	41	33	28

Rank under other weightings: 245th to 276th.

Stable low: below 45 under every weighting

Plympton received less than its share of state aid on all four measures; its blended score of 35 stays between 33 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100

222nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	49	30	36

Rank under other weightings: 214th to 235th.

Stable low: below 45 under every weighting

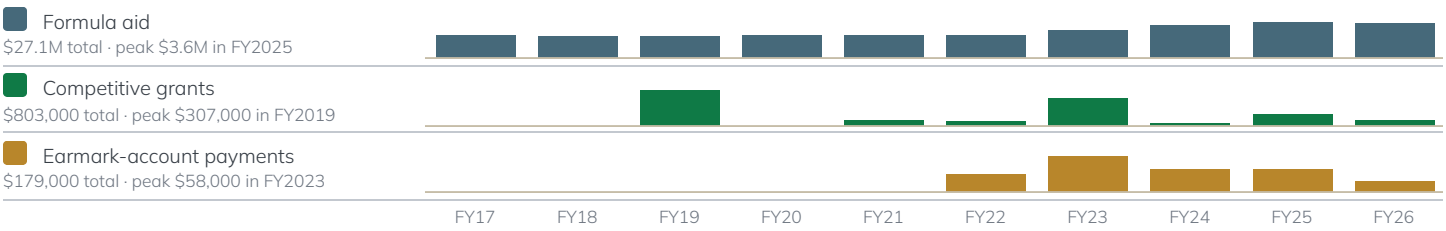
Plympton received less than its share of discretionary money on all four measures; its blended score of 40 stays between 36 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Plympton's town government and school districts received $27.1 million in formula aid and $803,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$27.1M	**$803,000**	**$179,000**
$9,237 per resident (207th of 351) · gross	$274 per resident (218th of 351)	$60.89 per resident (53rd of 351)

Competitive grants to Plympton peaked in FY2019 at $307,000, 38% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

Plympton received $335,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$335,000	**$335,000**	**$335,000**	**Not a member**
$114 per resident (31st of 351)	$114 per resident (52nd of 351)	$114 per resident (58th of 351)	35 municipalities had none

Placed in the town: 11 clauses in six of ten budgets; the most recent in FY2026. Every one names Plympton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$95,000	"the installation of a lift-type elevator and to complete construction in the Plympton council on Aging in the town of Plympton"	Enacted names the town
FY2024	$50,000	"the town of Plympton for water infrastructure improvements"	Enacted names the town
FY2025	$37,000	"the town of Plympton for HVAC upgrades and replacements"	Enacted names the town
FY2023	$35,000	"HVAC upgrades at Dennett Elementary School in Plympton"	Enacted names the town
FY2026	$25,000	"the town of Plympton for infrastructure improvements at the town center complex"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Plympton received 71% of its proportional share of competitive grant awards.

Local road miles **34.8** 315th of 351 · 11.9 per 1,000 residents (88th of 351)	Town-owned bridges, replacement cost **$3M** scored exposure $654,000 · none in poor condition	Road-stream crossings **29** 317th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **14.7 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **2,984** residents plus seasonal	Core infrastructure index **0.92** roads, culverts, dams, coast, flood, energy

Burden index 0.71; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **44 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$2,751** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$62.32** statewide $117 · FY2026	New growth per resident **$22,821** FY2017–2025 · 154th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.8% of Plympton's general-fund spending in FY2025, down from 10.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.8%** $757,000 of $7M · median town 14.1%	FY2016 **10.5%** $1M of $9.7M · median town 12.2%	FY2025 **9.8%** $1.5M of $15.1M · median town 11.5%	Net of state charges, FY2025 **9.0%** FY2010: 10.4% · median town 10.0%

Plympton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $945,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Plympton's state aid kept pace with both price measures: FY2025 aid was 26.5% above its FY2006 aid grown by Boston-area consumer prices and 12.4% above grown by the government price index.

Gross state aid went from $757,000 in FY2006 to $1.5 million in FY2025, +96.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+93.7%** $281,000 to $543,000 · all towns +54.0%	All fixed costs, FY2016–25 **+93.6%** $820,000 to $1.6M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Plympton's health insurance would have been $350,000 in FY2025; it was $543,000, $193,000 above the path. Its fixed costs would have been $1.02 million in FY2025; it was $1.59 million, $564,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Plympton came to $280,000, 106.6% of the $263,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$280,000	106.6%	28.2%
Placed in the town	$280,000	106.6%	42.3%
Everything placed	$280,000	106.6%	45.2%

SCHOOLS

Plympton's required school contribution is 3.4% of median household income, 23rd highest of 351.

Chapter 70 aid, FY2026 **$2M** to the town's district	Required local contribution **$4.6M** FY2026
Share of household income **3.4%** 23rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

Plympton runs its own district for some grades and belongs to Silver Lake for others; Plympton accounts for 10% of that district's foundation budget.

EXPECTED AND ACTUAL

Plympton received $1.1 million in earmarks placed in the town and competitive grants over ten years, 40% of the $2.9 million its size, need and institutions predict.

PEERS

Plympton ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Plympton this town	**35**	**$9,237**	**$274**	**$114**	**0.71**	**3.4%**
Northfield peer	52	$12,644	$1,336	$3.48	1.74	2.7%
Sheffield peer · lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%
Hinsdale peer	44	$9,786	$1,790	$0	2.54	3.6%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Princeton

Town · Worcester County · 3,529 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Worcester · Kimberly N. Ferguson

STATE SENATE
Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS
Wachusett Regional School District, shared with Holden, Paxton, Rutland and Sterling
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Princeton scores 39 on the Fairness Index for all state aid and 56 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

232nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	48	31	39

Rank under other weightings: 204th to 246th.

Stable low: below 45 under every weighting

Princeton received less than its share of state aid on all four measures; its blended score of 39 stays between 36 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

56 / 100

155th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	66	46	57

Rank under other weightings: 147th to 172nd.

Weighting-dependent: the range crosses the 45–55 band

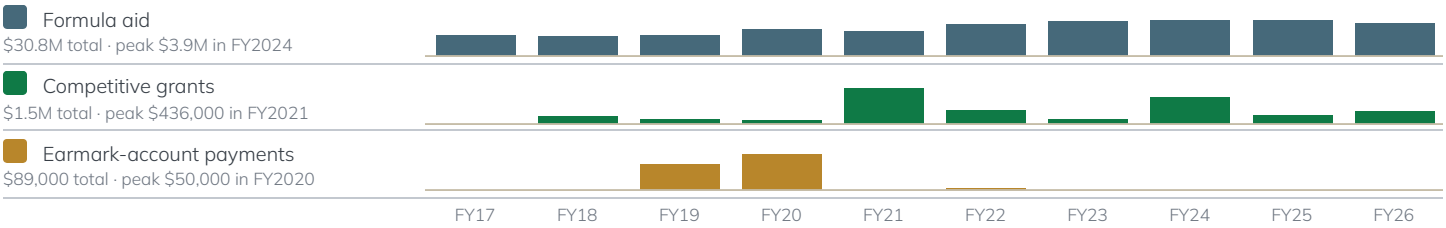
Princeton received more than its share of discretionary money on three of four measures; its blended score of 56 stays between 52 and 59 under every weighting tested.

STATE MONEY, FY2017–FY2026

Princeton's town government and school districts received $30.8 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$30.8M	$1.5M	$89,000
$8,727 per resident (228th of 351) · gross	$417 per resident (162nd of 351)	$25.17 per resident (173rd of 351)

Competitive grants to Princeton peaked in FY2021 at $436,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.7 million, are not shown.

EARMARKS

Princeton received $240,000 in local earmarks naming the town, $1.1 million placed in the town and $1.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$240,000	$1.1M	$1.1M	Not a member
$68.01 per resident (89th of 351)	$299 per resident (4th of 351)	$299 per resident (7th of 351)	35 municipalities had none

Placed in the town: 14 clauses in ten of ten budgets; the most recent in FY2026. $240,000 came in clauses that name Princeton; the other $815,000 went to organizations based in Princeton, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"identification of the number of households that receive drinking water from a private well and may require testing for polyfluoroalkyl substances..."	Enacted names the town
FY2026	$85,000	"the NEADS, Inc. Service Dogs for Veterans program to train service dogs for veterans"	Enacted recipient based here
FY2025	$85,000	"the NEADS, Inc. service dogs for veterans program to train service dogs for veterans"	Enacted recipient based here
FY2024	$85,000	"the NEADS Service Dogs for Veterans program to train service dogs for veterans"	Enacted recipient based here
FY2023	$85,000	"the NEADS Inc. service dogs for veterans program to train service dogs for veterans"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Princeton received about its proportional share of competitive grant awards.

Local road miles **79.5** 159th of 351 · 22.5 per 1,000 residents (52nd of 351)	Town-owned bridges, replacement cost **$9.7M** scored exposure $2.4M · two in poor condition	Road-stream crossings **73** 186th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **35.4 sq mi** 31% state-owned	Seasonal homes **3%** share of housing units	Peak service population **3,658** residents plus seasonal	Core infrastructure index **0.95** roads, culverts, dams, coast, flood, energy

Burden index 0.96; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,063 acres** 17.9% of land area · FY2026	State-owned land PILOT, FY2026 **$338,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$83.19** statewide $117 · FY2026	New growth per resident **$17,251** FY2017–2025 · 222nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.9% of Princeton's general-fund spending in FY2025, down from 11.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.5%** $887,000 of $7.7M · median town 14.1%	FY2016 **5.2%** $469,000 of $9M · median town 12.2%	FY2025 **5.9%** $775,000 of $13.2M · median town 11.5%	Net of state charges, FY2025 **5.6%** FY2010: 9.0% · median town 10.0%

Princeton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Princeton's state aid did not keep pace with either price measure: FY2025 aid was 43.7% below its FY2006 aid grown by Boston-area consumer prices and 49.9% below grown by the government price index.

Gross state aid went from $887,000 in FY2006 to $775,000 in FY2025, −12.7% in dollars. Flag: in FY2010, $388,000 of Princeton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+10.0%** $279,000 to $307,000 · all towns +54.0%	All fixed costs, FY2016–25 **+44.0%** $701,000 to $1M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Princeton's health insurance would have been $348,000 in FY2025; it was $307,000, $42,000 below the path. Its fixed costs would have been $876,000 in FY2025; it was $1.01 million, $134,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Princeton came to $240,000, 8.6 times the $28,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$240,000	8.6 times	28.2%
Placed in the town	$970,000	34.9 times	42.3%
Everything placed	$970,000	34.9 times	45.2%

SCHOOLS

Princeton's required school contribution is 2.3% of median household income, 278th highest of 351.

Chapter 70 aid, FY2026 **$1.5M** attributed to the town	Required local contribution **$4.8M** FY2026
Share of household income **2.3%** 278th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+52%** after inflation

Princeton has no school district of its own. Its pupils attend Wachusett and Montachusett; Princeton accounts for 6% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Princeton received $2.5 million in earmarks placed in the town and competitive grants over ten years, 64% more than the $1.5 million its size, need and institutions predict.

PEERS

Princeton ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Princeton this town	**39**	**$8,727**	**$417**	**$299**	**0.96**	**2.3%**
Groveland peer	52	$13,007	$476	$36.55	0.95	2.5%
Rowley peer	41	$9,213	$259	$26.57	0.42	2.7%
Stow peer	33	$7,771	$488	$90.02	2.17	2.4%
Wenham peer	29	$6,869	$147	$69.20	0.80	2.5%
Oak Bluffs peer	51	$8,440	$2,606	$93.40	3.64	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Provincetown

Town · Barnstable County · 3,703 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Barnstable · Hadley Luddy

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Provincetown Public Schools, the town's own district

Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Provincetown scores 39 on the Fairness Index for all state aid and 89 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

229th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	40	56	29

Rank under other weightings: 177th to 271st.

Stable low: below 45 under every weighting

Provincetown received less than its share of state aid on three of four measures; its blended score of 39 stays between 33 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

89 / 100

45th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
92	95	77	92

Rank under other weightings: 39th to 50th.

Stable high: above 55 under every weighting

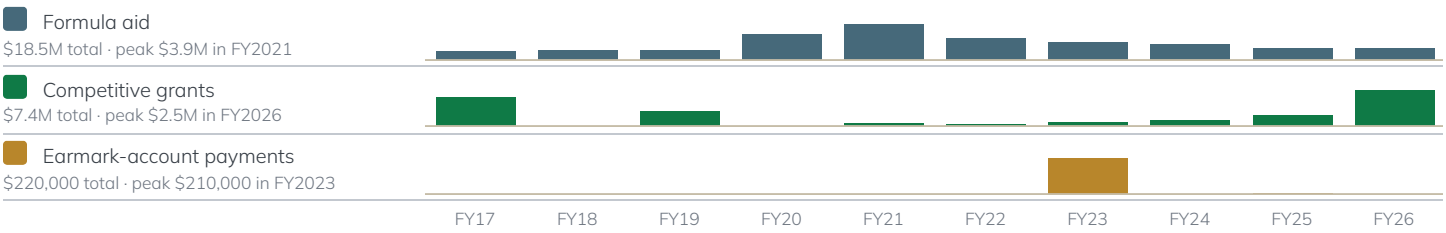
Provincetown received more than its share of discretionary money on all four measures; its blended score of 89 stays between 86 and 92 under every weighting tested.

STATE MONEY, FY2017–FY2026

Provincetown's town government and school districts received $18.5 million in formula aid and $7.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$18.5M	**$7.4M**	**$220,000**
$4,983 per resident (346th of 351) · gross	$2,004 per resident (45th of 351)	$59.37 per resident (57th of 351)

Competitive grants to Provincetown peaked in FY2026 at $2.5 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $53.9 million, are not shown.

EARMARKS

Provincetown received $317,000 in local earmarks naming the town, $572,000 placed in the town and $572,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$317,000	**$572,000**	**$572,000**	**Not a member**
$85.61 per resident (66th of 351)	$154 per resident (23rd of 351)	$154 per resident (29th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2025. $317,000 came in clauses that name Provincetown; the other $255,000 went to organizations based in Provincetown, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"T1 lines from route 6 to the Provincetown airport and National Seashore visitor center"	Enacted names the town
FY2024	$100,000	"the Center for Coastal Studies, Inc. for the shark ecology program"	Enacted recipient based here
FY2023	$80,000	"the Center for Coastal Studies, Inc. to aid in the investigation of the behavior of gray seals and white sharks in nearshore waters"	Enacted recipient based here
FY2022	$75,000	"the Center for Coastal Studies, Inc. to conduct an ecosystem-based study of white shark presence and behavior within the nearshore areas of Cape Cod"	Enacted recipient based here
FY2025	$50,000	"the Provincetown Theater for deferred maintenance costs"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Provincetown received 1.92 times its proportional share of competitive grant awards.

Local road miles **20.2** 338th of 351 · 5.5 per 1,000 residents (213th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **9.7 sq mi** 3% state-owned	Seasonal homes **50%** share of housing units	Peak service population **7,847** residents plus seasonal	Core infrastructure index **1.24** roads, culverts, dams, coast, flood, energy

Burden index 1.92; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **68 acres** 1.1% of land area · FY2026	State-owned land PILOT, FY2026 **$157,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,302** statewide $117 · FY2026	New growth per resident **$106,238** FY2017–2025 · 9th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.8% of Provincetown's general-fund spending in FY2025, down from 4.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.3%** $930,000 of $21.7M · median town 14.1%	FY2016 **3.3%** $834,000 of $25.4M · median town 12.2%	FY2025 **2.8%** $1.2M of $43.8M · median town 11.5%	Net of state charges, FY2025 **1.2%** FY2010: 0.3% · median town 10.0%

Provincetown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $25,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Provincetown's state aid did not keep pace with either price measure: FY2025 aid was 13.6% below its FY2006 aid grown by Boston-area consumer prices and 23.2% below grown by the government price index.

Gross state aid went from $930,000 in FY2006 to $1.2 million in FY2025, +34.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+10.2%** $3.6M to $3.9M · all towns +54.0%	All fixed costs, FY2016–25 **+49.3%** $6.1M to $9.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Provincetown's health insurance would have been $4.47 million in FY2025; it was $3.94 million, $525,000 below the path. Its fixed costs would have been $7.58 million in FY2025; it was $9.06 million, $1.48 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Provincetown came to $317,000, 86.9% of the $365,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$317,000	86.9%	28.2%
Placed in the town	$572,000	156.7%	42.3%
Everything placed	$572,000	156.7%	45.2%

SCHOOLS

Provincetown's required school contribution is 0.5% of median household income, the fourth-lowest of 351.

Chapter 70 aid, FY2026 **$354,000** to the town's district	Required local contribution **$1.5M** FY2026
Share of household income **0.5%** 348th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+21%** after inflation

Provincetown runs its own school district and also belongs to Cape Cod; Provincetown accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Provincetown received $8.2 million in earmarks placed in the town and competitive grants over ten years, 30% more than the $6.3 million its size, need and institutions predict.

PEERS

Provincetown ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Provincetown this town	**39**	**$4,983**	**$2,004**	**$154**	**1.92**	**0.5%**
Edgartown peer · lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%
Stockbridge peer	42	$6,979	$1,448	$140	2.33	1.5%
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
Otis peer	43	$6,679	$2,109	$0	1.01	2.2%
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Quincy

City · Norfolk County · 102,114 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Norfolk · Tackey Chan 45% of residents
1st Norfolk · Bruce J. Ayers 34% of residents
3rd Norfolk · Ronald Mariano 21% of residents

Quincy is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk and Plymouth · John F. Keenan

SCHOOL DISTRICTS

Quincy Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Quincy scores 32 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

32 / 100

287th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	29	40	30

Rank under other weightings: 249th to 313th.

Stable low: below 45 under every weighting

Quincy received less than its share of state aid on all four measures; its blended score of 32 stays between 31 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

253rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	31	38	32

Rank under other weightings: 245th to 261st.

Stable low: below 45 under every weighting

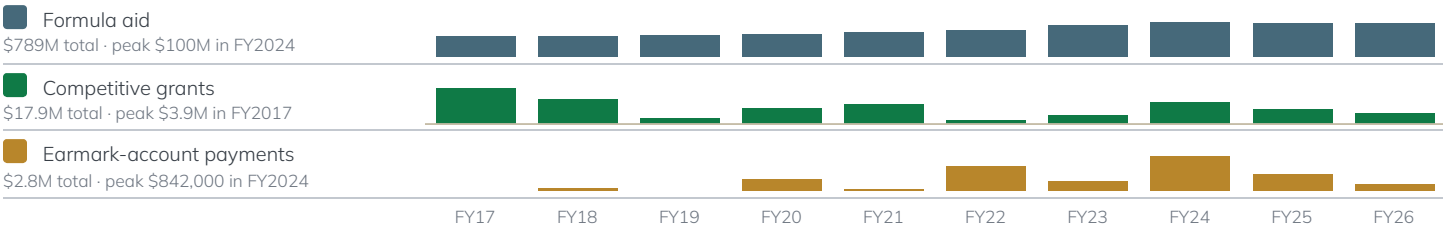
Quincy received less than its share of discretionary money on all four measures; its blended score of 34 stays between 32 and 35 under every weighting tested.

STATE MONEY, FY2017–FY2026

Quincy's town government and school districts received $789 million in formula aid and $17.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$789M	**$17.9M**	**$2.8M**
$7,723 per resident (267th of 351) · gross	$176 per resident (267th of 351)	$27.72 per resident (157th of 351)

Competitive grants to Quincy peaked in FY2017 at $3.9 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $84.7 million, are not shown.

EARMARKS

Quincy received $10.2 million in local earmarks naming the town, $10.9 million placed in the town and $11.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$10.2M	**$10.9M**	**$11.8M**	**Not a member**
$99.67 per resident (52nd of 351)	$107 per resident (60th of 351)	$116 per resident (55th of 351)	35 municipalities had none

Placed in the town: 105 clauses in ten of ten budgets; the most recent in FY2026. $9.3 million came in clauses that name Quincy; the other $1.7 million went to organizations based in Quincy, some of which serve a wider area.

Names the town includes $894,000 in clauses that name Quincy but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $894,000 in eight clauses for state facilities located in Quincy (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$500,000	"the Adams Presidential Center in the city of Quincy"	Enacted names the town
FY2026	$500,000 (split two ways)	"the New England Aquarium Corporation for the operation of facilities they operate in the cities of Boston and Quincy"	Enacted names the town
FY2025	$500,000	"the Adams Presidential Center in Quincy"	Enacted names the town
FY2025	$500,000 (split two ways)	"the New England Aquarium Corporation for upgrades and other improvements including those necessary for the operation of facilities operated by the…"	Enacted names the town
FY2024	$500,000 (split two ways)	"the New England Aquarium Corporation in the cities of Boston and Quincy for upgrades and other improvements, including those necessary for the…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Quincy received 82% of its proportional share of competitive grant awards.

Local road miles **187.1** 22nd of 351 · 1.8 per 1,000 residents (338th of 351)	Town-owned bridges, replacement cost **$48.7M** scored exposure $11.9M · one in poor condition	Road-stream crossings **91** 138th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.6 sq mi** 26% state-owned	Seasonal homes **0%** share of housing units	Peak service population **102,436** residents plus seasonal	Core infrastructure index **1.67** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,023 acres** 9.6% of land area · FY2026	State-owned land PILOT, FY2026 **$701,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$685** statewide $117 · FY2026	New growth per resident **$33,294** FY2017–2025 · 89th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.0% of Quincy's general-fund spending in FY2025, up from 14.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.2%** $36.6M of $258M · median town 14.1%	FY2016 **16.7%** $46.9M of $281M · median town 12.2%	FY2025 **15.0%** $71.9M of $479M · median town 11.5%	Net of state charges, FY2025 **13.9%** FY2010: 14.4% · median town 10.0%

Quincy's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $120,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Quincy's state aid kept pace with both price measures: FY2025 aid was 26.4% above its FY2006 aid grown by Boston-area consumer prices and 12.4% above grown by the government price index.

Gross state aid went from $36.6 million in FY2006 to $71.9 million in FY2025, +96.1% in dollars. Flag: in FY2010, $1.2 million of Quincy's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+222.5%** $39.9M to $129M · all towns +54.0%	All fixed costs, FY2016–25 **+69.2%** $71.5M to $121M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Quincy's health insurance would have been $49.8 million in FY2025; it was $129 million, $78.8 million above the path. Its fixed costs would have been $89.3 million in FY2025; it was $121 million, $31.7 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2021 (+45%); health insurance changed by more than 30% in one year in FY2021 (+117%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost. Flag: in FY2022, FY2023 and FY2025 reported health insurance exceeded all general-fund fixed costs; the health-insurance report includes the employee share for self-insured towns.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Quincy came to $8.3 million, 9.4% of the $88.7 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$8.3M	9.4%	28.2%
Placed in the town	$8.8M	9.9%	42.3%
Everything placed	$9.5M	10.8%	45.2%

SCHOOLS

Quincy's required school contribution is 3.0% of median household income, 72nd highest of 351.

Chapter 70 aid, FY2026 **$47.7M** to the town's district	Required local contribution **$135M** FY2026
Share of household income **3.0%** 72nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+23%** after inflation

Quincy runs its own school district and also belongs to Norfolk County; Quincy accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Quincy received $32.1 million in earmarks placed in the town and competitive grants over ten years, 35% more than the $23.9 million its size, need and institutions predict.

PEERS

Quincy ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Quincy this town	**32**	**$7,723**	**$176**	**$107**	**0.82**	**3.0%**
Weymouth peer	39	$8,687	$450	$104	2.15	2.8%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Peabody peer	39	$9,164	$124	$37.72	0.34	3.1%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Randolph

City · Norfolk County · 34,878 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Norfolk · Richard G. Wells, Jr. 67% of residents
1st Norfolk · Bruce J. Ayers 33% of residents

Randolph is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr. 59% of residents
Second Plymouth and Norfolk · Michael D. Brady 41% of residents

SCHOOL DISTRICTS

Randolph Public Schools, the city's own district
Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Dedham, Holbrook, Milton, Norwood and Westwood

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Randolph scores 46 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

156th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	40	52	48

Rank under other weightings: 130th to 193rd.

Weighting-dependent: the range crosses the 45–55 band

Randolph received less than its share of state aid on three of four measures; its blended score of 46 stays between 43 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

315th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
18	15	25	20

Rank under other weightings: 300th to 327th.

Stable low: below 45 under every weighting

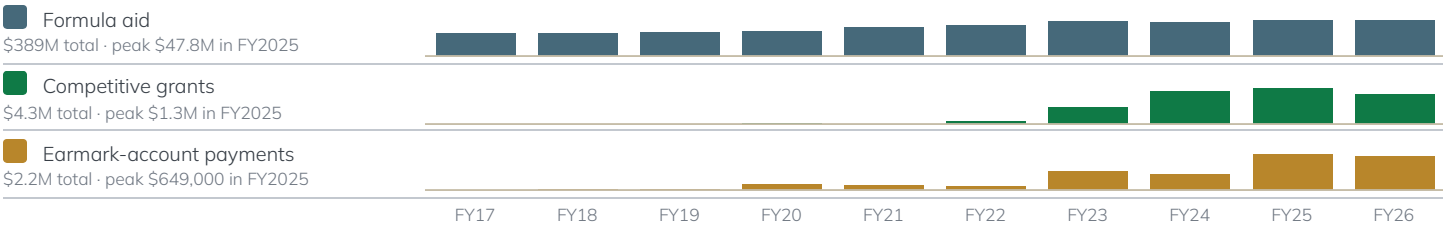
Randolph received less than its share of discretionary money on all four measures; its blended score of 20 stays between 18 and 22 under every weighting tested.

STATE MONEY, FY2017–FY2026

Randolph's town government and school districts received $389 million in formula aid and $4.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$389M	$4.3M	$2.2M
$11,148 per resident (141st of 351) · gross	$123 per resident (309th of 351)	$63.48 per resident (47th of 351)

Competitive grants to Randolph peaked in FY2025 at $1.3 million, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $43.6 million, are not shown.

EARMARKS

Randolph received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$1.2M	$1.2M	Not a member
$35.83 per resident (207th of 351)	$35.83 per resident (220th of 351)	$35.83 per resident (223rd of 351)	35 municipalities had none

Placed in the town: 31 clauses in ten of ten budgets; the most recent in FY2026. Every one names Randolph directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$100,000	"the Randolph community programs department in the town of Randolph for continuation of a full-time town social worker"	Enacted names the town
FY2024	$100,000	"the Randolph community programs department in the town of Randolph for continuation of a full-time town social worker"	Enacted names the town
FY2023	$100,000	"the Randolph community programs department in the city known as the town of Randolph for the hiring of a full-time community social worker"	Enacted names the town
FY2023	$93,000	"new lockers in the men's and women's locker rooms at the high school in the city known as the town of Randolph"	Enacted names the town
FY2025	$50,000	"the Randolph fire department for obtaining personal protective equipment in the town of Randolph"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Randolph received 23% of its proportional share of competitive grant awards.

Local road miles **99.5** 96th of 351 · 2.9 per 1,000 residents (321st of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **9.8 sq mi** 12% state-owned	Seasonal homes **0%** share of housing units	Peak service population **35,054** residents plus seasonal	Core infrastructure index **0.50** roads, culverts, dams, coast, flood, energy

Burden index 0.23; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **726 acres** 11.5% of land area · FY2026	State-owned land PILOT, FY2026 **$159,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$219** statewide $117 · FY2026	New growth per resident **$7,941** FY2017–2025 · 339th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 26.6% of Randolph's general-fund spending in FY2025, up from 24.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.9%** $17.5M of $70.5M · median town 14.1%	FY2016 **25.1%** $21.7M of $86.5M · median town 12.2%	FY2025 **26.6%** $33.6M of $127M · median town 11.5%	Net of state charges, FY2025 **19.8%** FY2010: 19.9% · median town 10.0%

Randolph's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Randolph's state aid kept pace with both price measures: FY2025 aid was 23.6% above its FY2006 aid grown by Boston-area consumer prices and 9.9% above grown by the government price index.

Gross state aid went from $17.5 million in FY2006 to $33.6 million in FY2025, +91.7% in dollars. Flag: in FY2010, $847,000 of Randolph's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+96.5%** $6.8M to $13.3M · all towns +54.0%	All fixed costs, FY2016–25 **+53.4%** $15.6M to $24M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Randolph's health insurance would have been $8.47 million in FY2025; it was $13.3 million, $4.86 million above the path. Its fixed costs would have been $19.5 million in FY2025; it was $24 million, $4.45 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+49%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Randolph came to $1.2 million, 17.6% of the $6.55 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.2M	17.6%	28.2%
Placed in the town	$1.2M	17.6%	42.3%
Everything placed	$1.2M	17.6%	45.2%

SCHOOLS

Randolph's required school contribution is 2.3% of median household income, 270th highest of 351.

Chapter 70 aid, FY2026 **$33.9M** to the town's district	Required local contribution **$32.7M** FY2026
Share of household income **2.3%** 270th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+41%** after inflation

Randolph runs its own school district and also belongs to Blue Hills and Norfolk County; Randolph accounts for 30% and 3% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Randolph received $6.5 million in earmarks placed in the town and competitive grants over ten years, 61% of the $10.6 million its size, need and institutions predict.

PEERS

Randolph ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Randolph this town	**46**	**$11,148**	**$123**	**$35.83**	**0.23**	**2.3%**
Dracut peer	46	$11,847	$125	$51.31	0.50	2.5%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Middleborough peer	45	$12,235	$110	$13.47	0.78	2.8%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Raynham

Town · Bristol County · 15,505 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
8th Plymouth · Dennis C. Gallagher

STATE SENATE
Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS
Bridgewater-Raynham Regional School District, shared with Bridgewater
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Dighton, Freetown, Middleborough, Rehoboth and Taunton

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Raynham scores 43 on the Fairness Index for all state aid and 12 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

177th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	46	38	46

Rank under other weightings: 166th to 207th.

Stable low: below 45 under every weighting

Raynham received less than its share of state aid on all four measures; its blended score of 43 stays between 41 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

12 / 100

340th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
12	14	10	14

Rank under other weightings: 335th to 343rd.

Stable low: below 45 under every weighting

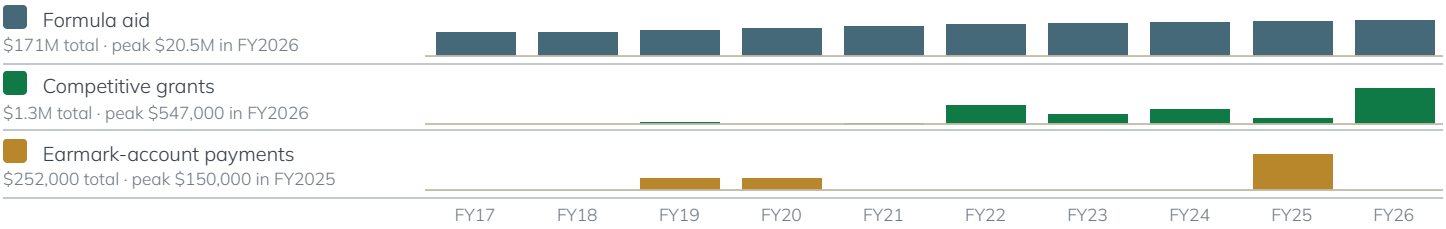
Raynham received less than its share of discretionary money on all four measures; its blended score of 12 stays between 12 and 13 under every weighting tested.

STATE MONEY, FY2017–FY2026

Raynham's town government and school districts received $171 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$171M	**$1.3M**	**$252,000**
$11,019 per resident (146th of 351) · gross	$86.59 per resident (332nd of 351)	$16.26 per resident (225th of 351)

Competitive grants to Raynham peaked in FY2026 at $547,000, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16.7 million, are not shown.

EARMARKS

Raynham received $515,000 in local earmarks naming the town, $890,000 placed in the town and $890,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$515,000	**$890,000**	**$890,000**	**Not a member**
$33.22 per resident (213th of 351)	$57.40 per resident (146th of 351)	$57.40 per resident (153rd of 351)	35 municipalities had none

Placed in the town: 14 clauses in eight of ten budgets; the most recent in FY2026. $515,000 came in clauses that name Raynham; the other $375,000 went to organizations based in Raynham, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$175,000	"the Southeastern Massachusetts Law Enforcement Council, Incorporated to provide law enforcement officers with access to critical incident stress…"	Enacted recipient based here
FY2018	$160,000	"the Raynham Housing Authority for public safety improvements"	Enacted names the town
FY2020	$100,000	"the Southeastern Massachusetts Law Enforcement Council, Incorporated to provide mental health, wellness and suicide prevention services to emergency…"	Enacted recipient based here
FY2019	$100,000	"the Southeastern Massachusetts Law Enforcement Council, Incoporated , to provide mental health, wellness and suicide prevention services to emergency…"	Enacted recipient based here
FY2025	$50,000	"the purpose of emergency roadway repairs in Raynham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Raynham received 94% of its proportional share of competitive grant awards.

Local road miles **76.7** 169th of 351 · 4.9 per 1,000 residents (236th of 351)	Town-owned bridges, replacement cost **$14.2M** scored exposure $4.3M · 1.5 in poor condition	Road-stream crossings **50** 260th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **20.5 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,505** residents plus seasonal	Core infrastructure index **0.76** roads, culverts, dams, coast, flood, energy

Burden index 0.94; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **134 acres** 1.0% of land area · FY2026	State-owned land PILOT, FY2026 **$29,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$215** statewide $117 · FY2026	New growth per resident **$18,162** FY2017–2025 · 213th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.3% of Raynham's general-fund spending in FY2025, down from 7.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.4%** $1.9M of $25.9M · median town 14.1%	FY2016 **3.7%** $1.3M of $36M · median town 12.2%	FY2025 **3.3%** $1.7M of $50.3M · median town 11.5%	Net of state charges, FY2025 **2.4%** FY2010: 4.0% · median town 10.0%

Raynham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $13.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Raynham's state aid did not keep pace with either price measure: FY2025 aid was 43.4% below its FY2006 aid grown by Boston-area consumer prices and 49.7% below grown by the government price index.

Gross state aid went from $1.9 million in FY2006 to $1.7 million in FY2025, −12.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+18.5%** $1.9M to $2.2M · all towns +54.0%	All fixed costs, FY2016–25 **+53.0%** $3.8M to $5.8M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Raynham's health insurance would have been $2.33 million in FY2025; it was $2.21 million, $118,000 below the path. Its fixed costs would have been $4.73 million in FY2025; it was $5.79 million, $1.07 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Raynham came to $490,000, 141.8% of the $345,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$490,000	141.8%	28.2%
Placed in the town	$690,000	2.0 times	42.3%
Everything placed	$690,000	2.0 times	45.2%

SCHOOLS

Raynham's required school contribution is 2.8% of median household income, 129th highest of 351.

Chapter 70 aid, FY2026 **$14.8M** attributed to the town	Required local contribution **$20.7M** FY2026
Share of household income **2.8%** 129th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

Raynham has no school district of its own. Its pupils attend Bridgewater-Raynham, Bristol Plymouth and Bristol County; Raynham accounts for 38%, 14% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Raynham received $2.5 million in earmarks placed in the town and competitive grants over ten years, 58% of the $4.3 million its size, need and institutions predict.

PEERS

Raynham ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Raynham this town	**43**	**$11,019**	**$86.59**	**$57.40**	**0.94**	**2.8%**
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Seekonk peer	31	$7,825	$53.68	$16.99	1.67	3.0%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Reading

Town · Middlesex County · 25,612 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

30th Middlesex · Richard M. Haggerty
62% of residents
20th Middlesex · Bradley H. Jones, Jr.
38% of residents
Reading is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fifth Middlesex · Jason M. Lewis

SCHOOL DISTRICTS

Reading Public Schools, the town's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Revere, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Reading scores 35 on the Fairness Index for all state aid and 21 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100
255th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	52	30	28

Rank under other weightings: 242nd to 271st.

Stable low: below 45 under every weighting

Reading received less than its share of state aid on three of four measures; its blended score of 35 stays between 31 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

21 / 100
309th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
16	30	23	14

Rank under other weightings: 296th to 321st.

Stable low: below 45 under every weighting

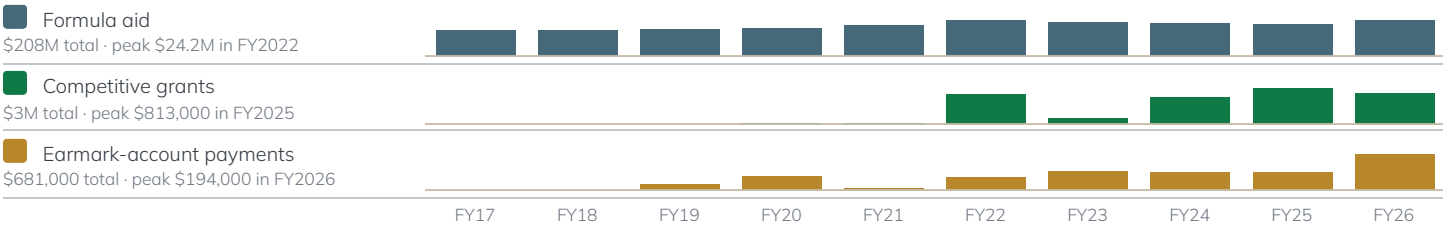
Reading received less than its share of discretionary money on all four measures; its blended score of 21 stays between 17 and 24 under every weighting tested.

STATE MONEY, FY2017–FY2026

Reading's town government and school districts received $208 million in formula aid and $3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$208M	**$3M**	**$681,000**
$8,102 per resident (249th of 351) · gross	$118 per resident (317th of 351)	$26.60 per resident (165th of 351)

Competitive grants to Reading peaked in FY2025 at $813,000, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13 million, are not shown.

EARMARKS

Reading received $800,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$800,000	**$800,000**	**$800,000**	**Not a member**
$31.24 per resident (227th of 351)	$31.24 per resident (237th of 351)	$31.24 per resident (238th of 351)	35 municipalities had none

Placed in the town: 20 clauses in eight of ten budgets; the most recent in FY2026. Every one names Reading directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$75,000	"the town of Reading school district to provide accessible school transportation for students with special needs"	Enacted names the town
FY2020	$75,000	"safety improvements at Reading Memorial High School"	Enacted names the town
FY2020	$60,000	"the town of Reading for the purchase of an elder and human services van"	Enacted names the town
FY2026	$50,000	"the town of Reading for townwide traffic intersection improvements"	Enacted names the town
FY2026	$50,000	"equipment acquisitions for Reading memorial high school in the town of Reading"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Reading received 1.27 times its proportional share of competitive grant awards.

Local road miles **92.5** 116th of 351 · 3.6 per 1,000 residents (294th of 351)	Town-owned bridges, replacement cost **$1.3M** scored exposure $280,000 · none in poor condition	Road-stream crossings **40** 295th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **10.0 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **25,830** residents plus seasonal	Core infrastructure index **2.41** roads, culverts, dams, coast, flood, energy

Burden index 1.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **282 acres** 4.4% of land area · FY2026	State-owned land PILOT, FY2026 **$65,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$230** statewide $117 · FY2026	New growth per resident **$22,668** FY2017–2025 · 155th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.1% of Reading's general-fund spending in FY2025, down from 18.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.7%** $12.2M of $65.2M · median town 14.1%	FY2016 **15.5%** $13.5M of $87.3M · median town 12.2%	FY2025 **13.1%** $16.3M of $124M · median town 11.5%	Net of state charges, FY2025 **12.4%** FY2010: 16.7% · median town 10.0%

Reading's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $150,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Reading's state aid did not keep pace with either price measure: FY2025 aid was 13.5% below its FY2006 aid grown by Boston-area consumer prices and 23.1% below grown by the government price index.

Gross state aid went from $12.2 million in FY2006 to $16.3 million in FY2025, +34.1% in dollars. Flag: in FY2010, $424,000 of Reading's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+43.3%** $9.5M to $13.6M · all towns +54.0%	All fixed costs, FY2016–25 **+42.8%** $16.4M to $23.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Reading's health insurance would have been $11.8 million in FY2025; it was $13.6 million, $1.74 million above the path. Its fixed costs would have been $20.5 million in FY2025; it was $23.5 million, $2.95 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2023 (+34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Reading came to $625,000, 15.2% of the $4.10 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$625,000	15.2%	28.2%
Placed in the town	$625,000	15.2%	42.3%
Everything placed	$625,000	15.2%	45.2%

SCHOOLS

Reading's required school contribution is 2.6% of median household income, 205th highest of 351.

Chapter 70 aid, FY2026 **$12.5M** to the town's district	Required local contribution **$41.3M** FY2026
Share of household income **2.6%** 205th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Reading runs its own school district and also belongs to Northeast Metropolitan; Reading accounts for 4% of that district's foundation budget.

EXPECTED AND ACTUAL

Reading received $4 million in earmarks placed in the town and competitive grants over ten years, 62% of the $6.5 million its size, need and institutions predict.

PEERS

Reading ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Reading this town	**35**	**$8,102**	**$118**	**$31.24**	**1.27**	**2.6%**
Walpole peer	30	$6,864	$139	$32.09	0.61	2.6%
Acton peer	40	$9,929	$351	$51.13	2.12	3.1%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Westford peer	45	$10,874	$400	$41.76	1.34	2.9%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Rehoboth

Town · Bristol County · 13,022 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Bristol · Steven S. Howitt

STATE SENATE

Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS

Dighton-Rehoboth Regional School District, shared with Dighton

Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Dighton, Freetown, Middleborough, Raynham and Taunton

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Rehoboth scores 33 on the Fairness Index for all state aid and 9 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

278th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	42	31	30

Rank under other weightings: 269th to 284th.

Stable low: below 45 under every weighting

Rehoboth received less than its share of state aid on all four measures; its blended score of 33 stays between 31 and 35 under every weighting tested.

DISCRETIONARY MONEY ONLY

9 / 100

350th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
8	12	8	7

Rank under other weightings: 349th to 350th.

Stable low: below 45 under every weighting

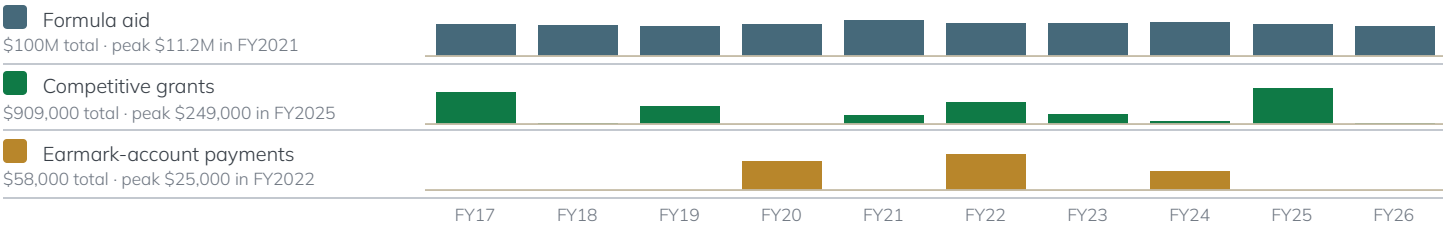
Rehoboth received less than its share of discretionary money on all four measures; its blended score of 9 stays between 8 and 10 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rehoboth's town government and school districts received $100 million in formula aid and $909,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$100M	**$909,000**	**$58,000**
$7,696 per resident (268th of 351) · gross	$69.78 per resident (339th of 351)	$4.49 per resident (294th of 351)

Competitive grants to Rehoboth peaked in FY2025 at $249,000, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.4 million, are not shown.

EARMARKS

Rehoboth received $167,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$167,000	**$167,000**	**$167,000**	**Not a member**
$12.80 per resident (290th of 351)	$12.80 per resident (298th of 351)	$12.80 per resident (299th of 351)	35 municipalities had none

Placed in the town: seven clauses in seven of ten budgets; the most recent in FY2026. Every one names Rehoboth directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$35,000	"the town of Rehoboth for the remediation, testing and supplies for water systems contaminated by per-and polyfluoroalkyl substances, as well as the…"	Enacted names the town
FY2026	$25,000	"the town of Rehoboth for the remediation, testing and supplies for water systems contaminated by per-and polyfluoroalkyl substances, as well as the…"	Enacted names the town
FY2023	$25,000	"replacement of the Rehoboth fire department's radio system in the town of Rehoboth"	Enacted names the town
FY2022	$25,000	"building code upgrades to the fire alarm and security system at the public safety building in the town of Rehoboth"	Enacted names the town
FY2020	$20,000	"the replacement of a diesel emergency generator for the public safety building in the town of Rehoboth"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rehoboth received 22% of its proportional share of competitive grant awards.

Local road miles **136.5** 44th of 351 · 10.5 per 1,000 residents (100th of 351)	Town-owned bridges, replacement cost **$10.9M** scored exposure $4.8M · four in poor condition	Road-stream crossings **148** 42nd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **46.9 sq mi** 0% state-owned	Seasonal homes **2%** share of housing units	Peak service population **13,331** residents plus seasonal	Core infrastructure index **0.27** roads, culverts, dams, coast, flood, energy

Burden index 0.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **139 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$49,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$355** statewide $117 · FY2026	New growth per resident **$30,948** FY2017–2025 · 100th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.0% of Rehoboth's general-fund spending in FY2025, down from 6.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.9%** $1.2M of $17.8M · median town 14.1%	FY2016 **5.1%** $1.3M of $24.7M · median town 12.2%	FY2025 **4.0%** $1.5M of $38M · median town 11.5%	Net of state charges, FY2025 **2.8%** FY2010: 4.5% · median town 10.0%

Rehoboth's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rehoboth's state aid did not keep pace with either price measure: FY2025 aid was 21.1% below its FY2006 aid grown by Boston-area consumer prices and 29.9% below grown by the government price index.

Gross state aid went from $1.2 million in FY2006 to $1.5 million in FY2025, +22.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+65.4%** $650,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+76.6%** $1.8M to $3.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rehoboth's health insurance would have been $812,000 in FY2025; it was $1.07 million, $263,000 above the path. Its fixed costs would have been $2.23 million in FY2025; it was $3.15 million, $922,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rehoboth came to $142,000, 33.3% of the $425,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$142,000	33.3%	28.2%
Placed in the town	$142,000	33.3%	42.3%
Everything placed	$142,000	33.3%	45.2%

SCHOOLS

Rehoboth's required school contribution is 2.8% of median household income, 119th highest of 351.

Chapter 70 aid, FY2026 **$5.9M** attributed to the town	Required local contribution **$18.3M** FY2026
Share of household income **2.8%** 119th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–17%** after inflation

Rehoboth has no school district of its own. Its pupils attend Dighton-Rehoboth, Bristol County and Bristol Plymouth; Rehoboth accounts for 57%, 7% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Rehoboth received $1.2 million in earmarks placed in the town and competitive grants over ten years, 37% of the $3.2 million its size, need and institutions predict.

PEERS

Rehoboth ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rehoboth this town	**33**	**$7,696**	**$69.78**	**$12.80**	**0.22**	**2.8%**
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Lakeville peer	44	$10,579	$119	$51.28	0.46	3.0%
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

SUFFOLK COUNTY

Revere

City · Suffolk County · 60,012 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

16th Suffolk · Jessica Ann Giannino
59% of residents
19th Suffolk · Jeffrey Rosario Turco
41% of residents
Revere is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Third Suffolk · Lydia Edwards

SCHOOL DISTRICTS

Revere Public Schools, the city's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Saugus, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Revere scores 64 on the Fairness Index for all state aid and 48 for discretionary money. Fifty is a fair share.

ALL STATE AID

64 / 100
28th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	59	64	68

Rank under other weightings: 23rd to 37th.

Stable high: above 55 under every weighting

Revere received more than its share of state aid on all four measures; its blended score of 64 stays between 62 and 65 under every weighting tested.

DISCRETIONARY MONEY ONLY

48 / 100
195th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	40	56	50

Rank under other weightings: 178th to 208th.

Near fair: between 45 and 55 under every weighting

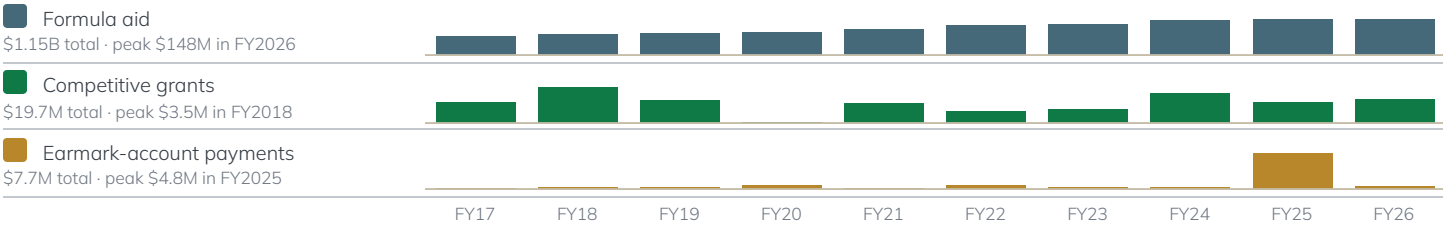
Revere received less than its share of discretionary money on three of four measures; its blended score of 48 stays between 45 and 51 under every weighting tested.

STATE MONEY, FY2017–FY2026

Revere's town government and school districts received $1.15 billion in formula aid and $19.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.15B	**$19.7M**	**$7.7M**
$19,109 per resident (33rd of 351) · gross	$328 per resident (199th of 351)	$128 per resident (17th of 351)

Competitive grants to Revere were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $84.3 million, are not shown.

EARMARKS

Revere received $3.7 million in local earmarks naming the town, $1.9 million placed in the town and $3.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.7M	**$1.9M**	**$3.7M**	**Not a member**
$62.08 per resident (113th of 351)	$31.01 per resident (238th of 351)	$62.08 per resident (144th of 351)	35 municipalities had none

Placed in the town: 46 clauses in nine of ten budgets; the most recent in FY2026. Every one names Revere directly.

Names the town includes $1.9 million in clauses that name Revere but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $1.9 million in ten clauses for state facilities located in Revere (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$200,000	"the renovation of George C. Sullivan field in Revere to construct a park geared toward senior citizens"	Enacted names the town
FY2022	$150,000	"a child safety program in the city of Revere"	Enacted names the town
FY2024	$100,000	"Housing Families Inc. for the provision of housing-supportive resources to the residents of the city of Revere"	Enacted names the town
FY2026	$75,000	"the child safety program in the city of Revere"	Enacted names the town
FY2025	$75,000	"the city of Revere to create a pilot program for grants of not less than $5,000 directed to eligible first-time homebuyers who have lived in a…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Revere received 2.70 times its proportional share of competitive grant awards.

Local road miles **83.8** 143rd of 351 · 1.4 per 1,000 residents (345th of 351)	Town-owned bridges, replacement cost **$16.5M** scored exposure $5.9M · none in poor condition	Road-stream crossings **11** 337th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **5.7 sq mi** 17% state-owned	Seasonal homes **0%** share of housing units	Peak service population **60,192** residents plus seasonal	Core infrastructure index **0.82** roads, culverts, dams, coast, flood, energy

Burden index 2.70; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$970** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$277** statewide $117 · FY2026	New growth per resident **$28,447** FY2017–2025 · 116th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 39.3% of Revere's general-fund spending in FY2025, up from 32.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **32.5%** $37.3M of $115M · median town 14.1%	FY2016 **40.1%** $65.2M of $163M · median town 12.2%	FY2025 **39.3%** $118M of $299M · median town 11.5%	Net of state charges, FY2025 **33.1%** FY2010: 29.4% · median town 10.0%

Revere's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $4.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Revere's state aid kept pace with both price measures: FY2025 aid was 103.7% above its FY2006 aid grown by Boston-area consumer prices and 81.1% above grown by the government price index.

Gross state aid went from $37.3 million in FY2006 to $118 million in FY2025, +215.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+219.0%** $21.9M to $70M · all towns +54.0%	All fixed costs, FY2016–25 **+134.1%** $34.5M to $80.7M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Revere's health insurance would have been $27.4 million in FY2025; it was $70 million, $42.6 million above the path. Its fixed costs would have been $43 million in FY2025; it was $80.7 million, $37.6 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+51%), FY2018 (–38%), FY2019 (+88%), FY2022 (–31%) and FY2023 (+63%); health insurance changed by more than 30% in one year in FY2017 (+79%), FY2018 (–55%), FY2019 (+159%), FY2022 (–39%) and FY2023 (+89%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Revere came to $3.3 million, 6.8% of the $48 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.3M	6.8%	28.2%
Placed in the town	$1.5M	3.2%	42.3%
Everything placed	$3.3M	6.8%	45.2%

SCHOOLS

Revere's required school contribution is 2.8% of median household income, 121st highest of 351.

Chapter 70 aid, FY2026 **$112M** to the town's district	Required local contribution **$54.4M** FY2026
Share of household income **2.8%** 121st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+28%** after inflation

Revere runs its own school district and also belongs to Northeast Metropolitan; Revere accounts for 20% of that district's foundation budget.

EXPECTED AND ACTUAL

Revere received $22.1 million in earmarks placed in the town and competitive grants over ten years, 17% more than the $18.9 million its size, need and institutions predict.

PEERS

Revere ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Revere this town	**64**	**$19,109**	**$328**	**$31.01**	**2.70**	**2.8%**
Malden peer	51	$13,164	$195	$58.55	1.64	2.4%
Haverhill peer	58	$16,056	$523	$98.18	2.11	2.7%
Marlborough peer	53	$13,835	$804	$65.97	1.57	3.4%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Framingham best in class of 30	54	$14,513	$248	$157	0.72	3.1%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Richmond

Town · Berkshire County · 1,403 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Richmond Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Richmond scores 40 on the Fairness Index for all state aid and 68 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

216th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	42	40	39

Rank under other weightings: 210th to 241st.

Stable low: below 45 under every weighting

Richmond received less than its share of state aid on all four measures; its blended score of 39 stays between 39 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

68 / 100

117th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	74	56	72

Rank under other weightings: 108th to 122nd.

Stable high: above 55 under every weighting

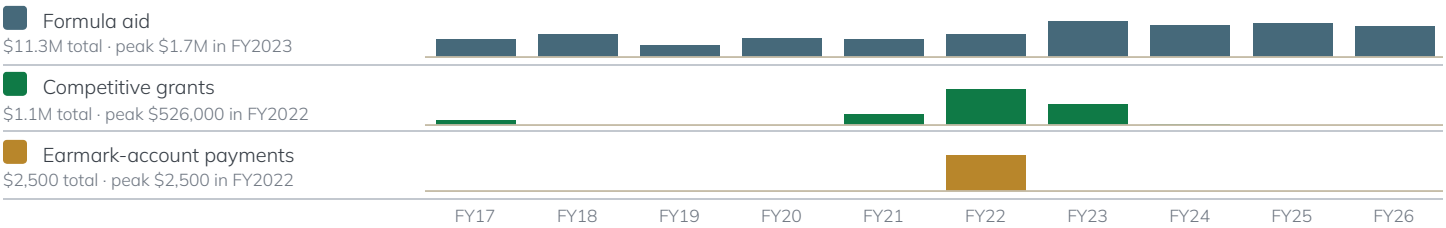
Richmond received more than its share of discretionary money on all four measures; its blended score of 68 stays between 65 and 71 under every weighting tested.

STATE MONEY, FY2017–FY2026

Richmond's town government and school districts received $11.3 million in formula aid and $1.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.3M	$1.1M	$2,500
$8,072 per resident (252nd of 351) · gross	$776 per resident (99th of 351)	$1.78 per resident (318th of 351)

Competitive grants to Richmond peaked in FY2022 at $526,000, 48% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $974,000, are not shown.

EARMARKS

No local earmark was placed in Richmond in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Richmond's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Richmond.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Richmond's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
West Stockbridge	$0	$0	$0	$0
Egremont	$0	$485,000	$485,000	$394
Erving	$0	$0	$0	$0
Blandford	$0	$0	$0	$0
Hinsdale	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Richmond received 19% of its proportional share of competitive grant awards.

Local road miles **39.0** 295th of 351 · 27.8 per 1,000 residents (45th of 351)	Town-owned bridges, replacement cost **$1.5M** scored exposure $194,000 · none in poor condition	Road-stream crossings **90** 141st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **18.7 sq mi** 2% state-owned	Seasonal homes **24%** share of housing units	Peak service population **1,860** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **289 acres** 2.4% of land area · FY2026	State-owned land PILOT, FY2026 **$25,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$86.17** statewide $117 · FY2026	New growth per resident **$21,572** FY2017–2025 · 166th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.4% of Richmond's general-fund spending in FY2025, down from 17.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.8%** $820,000 of $4.6M · median town 14.1%	FY2016 **15.5%** $848,000 of $5.5M · median town 12.2%	FY2025 **13.4%** $1.1M of $7.9M · median town 11.5%	Net of state charges, FY2025 **11.5%** FY2010: 20.5% · median town 10.0%

Richmond's state aid did not keep pace with either price measure: FY2025 aid was 16.0% below its FY2006 aid grown by Boston-area consumer prices and 25.4% below grown by the government price index.

Gross state aid went from $820,000 in FY2006 to $1.1 million in FY2025, +30.2% in dollars. Flag: in FY2010, $297,000 of Richmond's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.8%** $129,000 to $193,000 · all towns +54.0%	All fixed costs, FY2016–25 **+67.2%** $340,000 to $569,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Richmond's health insurance would have been $161,000 in FY2025; it was $193,000, $32,000 above the path. Its fixed costs would have been $425,000 in FY2025; it was $569,000, $144,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2020 (–34%) and FY2023 (+39%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Richmond came to $0, 0.0% of the $64,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Richmond's required school contribution is 2.2% of median household income, 285th highest of 351.

Chapter 70 aid, FY2026 **$554,000** to the town's district	Required local contribution **$1.5M** FY2026
Share of household income **2.2%** 285th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+12%** after inflation

Richmond runs its own school district.

EXPECTED AND ACTUAL

Richmond received $1.1 million in earmarks placed in the town and competitive grants over ten years, 42% of the $2.6 million its size, need and institutions predict.

PEERS

Richmond is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Richmond this town	**40**	**$8,072**	**$776**	**$0**	**0.19**	**2.2%**
West Stockbridge peer · lowest in class of 30	43	$9,304	$478	$0	0.46	2.4%
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Erving peer	50	$7,326	$3,750	$0	8.12	4.7%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Hinsdale peer	44	$9,786	$1,790	$0	2.54	3.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Rochester

Town · Plymouth County · 5,837 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

10th Bristol · Mark D. Sylvia

STATE SENATE

First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS

Rochester Public Schools, the town's own district
Old Rochester Regional School District, shared with Marion and Mattapoisett
Old Colony Regional Vocational Technical School District, vocational, shared with Acushnet, Carver, Lakeville and Mattapoisett

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Rochester scores 43 on the Fairness Index for all state aid and 42 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

184th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	52	38	37

Rank under other weightings: 165th to 210th.

Weighting-dependent: the range crosses the 45–55 band

Rochester received less than its share of state aid on three of four measures; its blended score of 43 stays between 40 and 46 under every weighting tested.

DISCRETIONARY MONEY ONLY

42 / 100

213th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	53	33	38

Rank under other weightings: 204th to 220th.

Weighting-dependent: the range crosses the 45–55 band

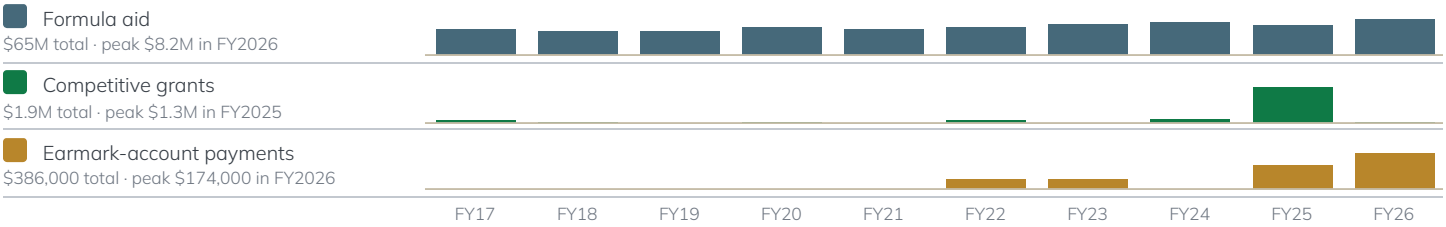
Rochester received less than its share of discretionary money on three of four measures; its blended score of 42 stays between 38 and 46 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rochester's town government and school districts received $65 million in formula aid and $1.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$65M	**$1.9M**	**$386,000**
$11,142 per resident (142nd of 351) · gross	$331 per resident (196th of 351)	$66.21 per resident (42nd of 351)

Competitive grants to Rochester peaked in FY2025 at $1.3 million, 70% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.2 million, are not shown.

EARMARKS

Rochester received $295,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$295,000	**$295,000**	**$295,000**	**Not a member**
$50.54 per resident (147th of 351)	$50.54 per resident (170th of 351)	$50.54 per resident (174th of 351)	35 municipalities had none

Placed in the town: seven clauses in five of ten budgets; the most recent in FY2026. Every one names Rochester directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$75,000	"the town of Rochester for improvements to the town's transfer station"	Enacted names the town
FY2024	$50,000	"as a grant to the town of Rochester to partner with the Southeastern Regional Planning and Economic Development District and other experts to support…"	Enacted names the town
FY2023	$50,000	"a public safety facility planning and feasibility study in the town of Rochester"	Enacted names the town
FY2023	$50,000	"the Rochester council on aging for the purchase of a handicap-accessible vehicle"	Enacted names the town
FY2026	$30,000	"the town of Rochester for updates and improvements to the town website"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rochester received 45% of its proportional share of competitive grant awards.

Local road miles **67.9** 196th of 351 · 11.6 per 1,000 residents (89th of 351)	Town-owned bridges, replacement cost **$4.1M** scored exposure $1.2M · none in poor condition	Road-stream crossings **93** 133rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **33.6 sq mi** 6% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,837** residents plus seasonal	Core infrastructure index **0.13** roads, culverts, dams, coast, flood, energy

Burden index 0.45; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,453 acres** 6.8% of land area · FY2026	State-owned land PILOT, FY2026 **$138,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$94.92** statewide $117 · FY2026	New growth per resident **$35,691** FY2017–2025 · 78th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.5% of Rochester's general-fund spending in FY2025, down from 16.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **16.3%** $2.3M of $14.1M · median town 14.1%	FY2016 **11.6%** $2.3M of $19.6M · median town 12.2%	FY2025 **12.5%** $3.2M of $26M · median town 11.5%	Net of state charges, FY2025 **11.9%** FY2010: 12.5% · median town 10.0%

Rochester's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rochester's state aid did not keep pace with either price measure: FY2025 aid was 9.2% below its FY2006 aid grown by Boston-area consumer prices and 19.3% below grown by the government price index.

Gross state aid went from $2.3 million in FY2006 to $3.2 million in FY2025, +40.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+39.8%** $699,000 to $976,000 · all towns +54.0%	All fixed costs, FY2016–25 **+60.5%** $1.7M to $2.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rochester's health insurance would have been $873,000 in FY2025; it was $976,000, $104,000 above the path. Its fixed costs would have been $2.12 million in FY2025; it was $2.72 million, $603,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rochester came to $265,000, 95.4% of the $278,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$265,000	95.4%	28.2%
Placed in the town	$265,000	95.4%	42.3%
Everything placed	$265,000	95.4%	45.2%

SCHOOLS

Rochester's required school contribution is 3.3% of median household income, 28th highest of 351.

Chapter 70 aid, FY2026 **$4.9M** to the town's district	Required local contribution **$8.9M** FY2026
Share of household income **3.3%** 28th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

Rochester runs its own district for some grades and belongs to Old Rochester and Old Colony for others; Rochester accounts for 34% and 18% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Rochester received $2.6 million in earmarks placed in the town and competitive grants over ten years, 55% of the $4.8 million its size, need and institutions predict.

PEERS

Rochester ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rochester this town	**43**	**$11,142**	**$331**	**$50.54**	**0.45**	**3.3%**
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Boylston peer	32	$7,545	$121	$68.71	0.67	2.6%
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Deerfield lowest in class of 30	44	$9,461	$1,195	$6.46	2.83	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Rockland

Town · Plymouth County · 17,701 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Plymouth · David F. DeCoste

STATE SENATE

Norfolk and Plymouth · John F. Keenan

SCHOOL DISTRICTS

Rockland Public Schools, the town's own district

South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Hanson, Marshfield, Norwell, Scituate and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Rockland scores 52 on the Fairness Index for all state aid and 61 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

104th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	53	53	50

Rank under other weightings: 94th to 115th.

Near fair: between 45 and 55 under every weighting

Rockland received more than its share of state aid on all four measures; its blended score of 52 stays between 52 and 53 under every weighting tested.

DISCRETIONARY MONEY ONLY

61 / 100

136th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	61	65	58

Rank under other weightings: 129th to 144th.

Stable high: above 55 under every weighting

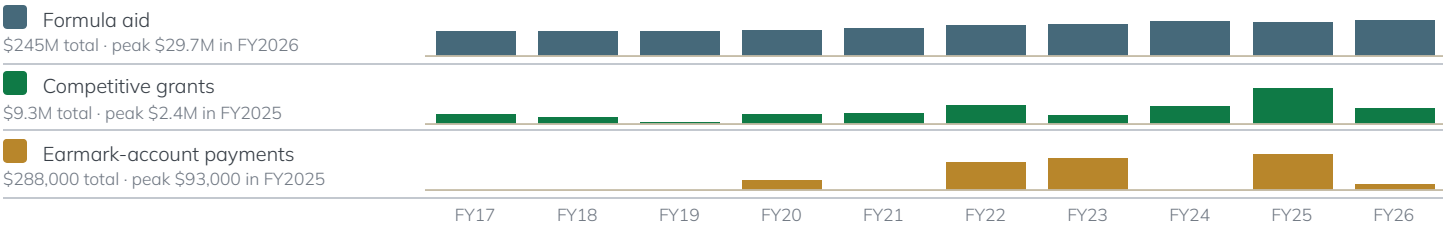
Rockland received more than its share of discretionary money on all four measures; its blended score of 61 stays between 60 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rockland's town government and school districts received $245 million in formula aid and $9.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$245M	**$9.3M**	**$288,000**
$13,816 per resident (99th of 351) · gross	$523 per resident (135th of 351)	$16.25 per resident (226th of 351)

Competitive grants to Rockland peaked in FY2025 at $2.4 million, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $22.7 million, are not shown.

EARMARKS

Rockland received $734,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$734,000	**$734,000**	**$734,000**	**Not a member**
$41.44 per resident (178th of 351)	$41.44 per resident (197th of 351)	$41.44 per resident (200th of 351)	35 municipalities had none

Placed in the town: 22 clauses in nine of ten budgets; the most recent in FY2026. Every one names Rockland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$80,000	"the town of Rockland for work including, but not limited to, predesign of the VFW drive and Weymouth street corridor improvement project"	Enacted names the town
FY2023	$75,000	"the town of Rockland for traffic and sidewalk improvements"	Enacted names the town
FY2025	$62,000	"restorations and improvements to the public baseball fields in the town of Rockland"	Enacted names the town
FY2019	$60,000	"the Rockland Housing Authority for maintenance and repairs"	Enacted names the town
FY2022	$50,000	"the town of Rockland for manhole and catch basin structure replacements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rockland received 1.27 times its proportional share of competitive grant awards.

Local road miles **49.9** 254th of 351 · 2.8 per 1,000 residents (322nd of 351)	Town-owned bridges, replacement cost **$336,000** scored exposure $87,000 · none in poor condition	Road-stream crossings **53** 249th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **10.0 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,701** residents plus seasonal	Core infrastructure index **1.85** roads, culverts, dams, coast, flood, energy

Burden index 1.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$10,689** FY2017–2025 · 309th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 28.2% of Rockland's general-fund spending in FY2025, down from 32.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **32.0%** $12.2M of $38M · median town 14.1%	FY2016 **29.0%** $15.7M of $54M · median town 12.2%	FY2025 **28.2%** $23.2M of $82.2M · median town 11.5%	Net of state charges, FY2025 **23.5%** FY2010: 25.7% · median town 10.0%

Rockland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rockland's state aid kept pace with both price measures: FY2025 aid was 22.7% above its FY2006 aid grown by Boston-area consumer prices and 9.1% above grown by the government price index.

Gross state aid went from $12.2 million in FY2006 to $23.2 million in FY2025, +90.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+76.3%** $4.9M to $8.7M · all towns +54.0%	All fixed costs, FY2016–25 **+61.7%** $9.6M to $15.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rockland's health insurance would have been $6.15 million in FY2025; it was $8.68 million, $2.53 million above the path. Its fixed costs would have been $12 million in FY2025; it was $15.5 million, $3.53 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rockland came to $650,000, 17.3% of the $3.75 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$650,000	17.3%	28.2%
Placed in the town	$650,000	17.3%	42.3%
Everything placed	$650,000	17.3%	45.2%

SCHOOLS

Rockland's required school contribution is 2.5% of median household income, 221st highest of 351.

Chapter 70 aid, FY2026 **$21.5M** to the town's district	Required local contribution **$19.4M** FY2026
Share of household income **2.5%** 221st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

Rockland runs its own school district and also belongs to South Shore; Rockland accounts for 21% of that district's foundation budget.

EXPECTED AND ACTUAL

Rockland received $10 million in earmarks placed in the town and competitive grants over ten years, 58% more than the $6.3 million its size, need and institutions predict.

PEERS

Rockland ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rockland this town	**52**	**$13,816**	**$523**	**$41.44**	**1.27**	**2.5%**
Amesbury peer	39	$9,706	$676	$64.69	2.17	2.8%
Winthrop peer	40	$8,903	$365	$158	0.60	2.4%
Hudson peer	42	$10,896	$229	$66.49	0.91	3.1%
Whitman peer	56	$16,230	$202	$15.36	0.52	2.5%
Pepperell peer	51	$13,867	$271	$56.38	1.79	2.6%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Rockport

Town · Essex County · 7,009 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Essex · Andrew Tarr and Ann-Margaret Ferrante (until November 2025)

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Rockport Public Schools, the town's own district
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Rockport scores 29 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

314th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	30	40	20

Rank under other weightings: 278th to 335th.

Stable low: below 45 under every weighting

Rockport received less than its share of state aid on all four measures; its blended score of 29 stays between 26 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

161st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	60	56	46

Rank under other weightings: 153rd to 174th.

Weighting-dependent: the range crosses the 45–55 band

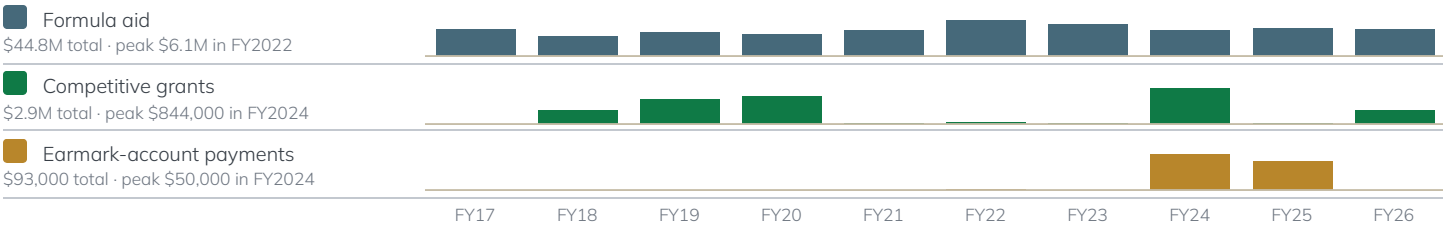
Rockport received more than its share of discretionary money on three of four measures; its blended score of 55 stays between 53 and 57 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rockport's town government and school districts received $44.8 million in formula aid and $2.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$44.8M	**$2.9M**	**$93,000**
$6,385 per resident (324th of 351) · gross	$408 per resident (164th of 351)	$13.25 per resident (238th of 351)

Competitive grants to Rockport peaked in FY2024 at $844,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10.7 million, are not shown.

EARMARKS

Rockport received $671,000 in local earmarks naming the town, $621,000 placed in the town and $671,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$671,000	**$621,000**	**$671,000**	**Not a member**
$95.69 per resident (55th of 351)	$88.56 per resident (88th of 351)	$95.69 per resident (84th of 351)	35 municipalities had none

Placed in the town: 18 clauses in six of ten budgets; the most recent in FY2026. Every one names Rockport directly.

Names the town includes $50,000 in clauses that name Rockport but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Rockport (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$95,000	"the town of Rockport to purchase pump station equipment for the Dock square pump station"	Enacted names the town
FY2024	$75,000	"the modernization of the dock square sewer pump in the town of Rockport"	Enacted names the town
FY2023	$67,000 (split three ways)	"in support of Manchester-by-the-Sea's Confronting the Challenges of Climate Change project in the city of Gloucester and the towns of Essex and…"	Enacted names the town
FY2026	$50,000	"a heating, ventilation and air conditioning system at the Rockport public library"	Enacted names the town
FY2023	$50,000	"the town of Rockport for coastal resilience planning and mitigation"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rockport received 1.27 times its proportional share of competitive grant awards.

Local road miles **32.6** 321st of 351 · 4.7 per 1,000 residents (253rd of 351)	Town-owned bridges, replacement cost **$1M** scored exposure $267,000 · none in poor condition	Road-stream crossings **14** 333rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **7.0 sq mi** 2% state-owned	Seasonal homes **20%** share of housing units	Peak service population **8,785** residents plus seasonal	Core infrastructure index **1.70** roads, culverts, dams, coast, flood, energy

Burden index 1.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **82 acres** 1.8% of land area · FY2026	State-owned land PILOT, FY2026 **$36,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$435** statewide $117 · FY2026	New growth per resident **$21,916** FY2017–2025 · 161st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.2% of Rockport's general-fund spending in FY2025, down from 14.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.1%** $3.2M of $22.9M · median town 14.1%	FY2016 **11.1%** $3.1M of $27.8M · median town 12.2%	FY2025 **9.2%** $3.7M of $39.8M · median town 11.5%	Net of state charges, FY2025 **6.4%** FY2010: 8.3% · median town 10.0%

Rockport's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $53,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rockport's state aid did not keep pace with either price measure: FY2025 aid was 26.4% below its FY2006 aid grown by Boston-area consumer prices and 34.5% below grown by the government price index.

Gross state aid went from $3.2 million in FY2006 to $3.7 million in FY2025, +14.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+21.7%** $4M to $4.8M · all towns +54.0%	All fixed costs, FY2016–25 **+36.3%** $5.9M to $8.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rockport's health insurance would have been $4.95 million in FY2025; it was $4.82 million, $127,000 below the path. Its fixed costs would have been $7.42 million in FY2025; it was $8.10 million, $680,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rockport came to $574,000, 66.9% of the $858,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$574,000	66.9%	28.2%
Placed in the town	$524,000	61.0%	42.3%
Everything placed	$574,000	66.9%	45.2%

SCHOOLS

Rockport's required school contribution is 2.1% of median household income, 301st highest of 351.

Chapter 70 aid, FY2026 **$1.8M** to the town's district	Required local contribution **$6.5M** FY2026
Share of household income **2.1%** 301st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+30%** after inflation

Rockport runs its own school district and also belongs to Essex North Shore; Rockport accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Rockport received $3.5 million in earmarks placed in the town and competitive grants over ten years, 52% of the $6.8 million its size, need and institutions predict.

PEERS

Rockport ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rockport this town	**29**	**$6,385**	**$408**	**$88.56**	**1.27**	**2.1%**
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Orleans peer	26	$4,954	$820	$115	1.26	1.7%
Brewster peer	35	$6,965	$860	$28.79	2.03	2.6%
Wellfleet peer	37	$4,162	$3,572	$59.49	1.85	1.3%
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Rowe

Town · Franklin County · 453 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Franklin · Natalie M. Blais	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Rowe Public Schools**, the town's own district	Franklin Regional Council Of Governments

FAIRNESS INDEX

Rowe scores 53 on the Fairness Index for all state aid and 94 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

96th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	50	44	66

Rank under other weightings: 73rd to 128th.

Weighting-dependent: the range crosses the 45–55 band

Rowe received more than its share of state aid on three of four measures; its blended score of 53 stays between 50 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

94 / 100

27th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
97	96	85	98

Rank under other weightings: 19th to 32nd.

Stable high: above 55 under every weighting

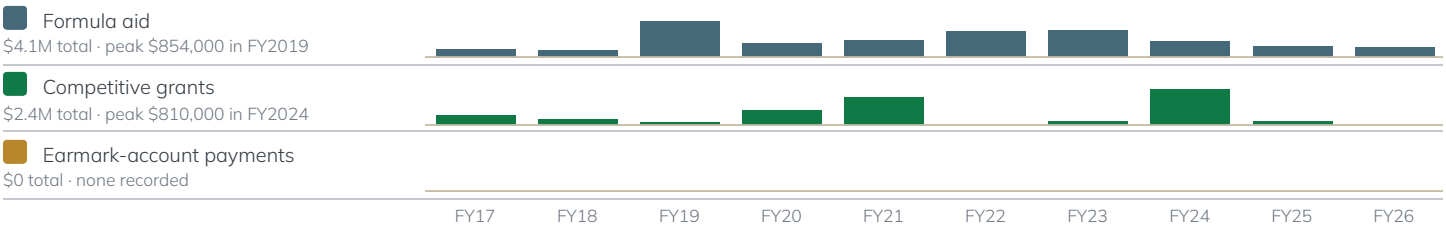
Rowe received more than its share of discretionary money on all four measures; its blended score of 94 stays between 92 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rowe's town government and school districts received $4.1 million in formula aid and $2.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$4.1M	**$2.4M**	**$0**
$9,050 per resident (219th of 351) · gross	$5,291 per resident (15th of 351)	$0 per resident (339th of 351)

Competitive grants to Rowe peaked in FY2024 at $810,000, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 453 residents, a single payment moves Rowe's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

No local earmark was placed in Rowe in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Rowe's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Hancock	$0	$0	$0	$0
Egremont	$0	$485,000	$485,000	$394
Becket	$0	$0	$0	$0
Erving	$0	$0	$0	$0
Tolland	$6,111	$6,111	$6,111	$11.32

WHAT THE TOWN CARRIES

Measured against what it maintains, Rowe received 1.34 times its proportional share of competitive grant awards.

Local road miles **35.3** 312th of 351 · 77.8 per 1,000 residents (7th of 351)	Town-owned bridges, replacement cost **$10.2M** scored exposure $3.4M · four in poor condition	Road-stream crossings **42** 288th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **23.4 sq mi** 3% state-owned	Seasonal homes **18%** share of housing units	Peak service population **564** residents plus seasonal	Core infrastructure index **2.16** roads, culverts, dams, coast, flood, energy

Burden index 1.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **425 acres** 2.8% of land area · FY2026	State-owned land PILOT, FY2026 **$27,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$62.49** statewide $117 · FY2026	New growth per resident **$373,499** FY2017–2025 · 2nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.3% of Rowe's general-fund spending in FY2025, up from 6.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.3%** $167,000 of $2.6M · median town 14.1%	FY2016 **7.4%** $256,000 of $3.5M · median town 12.2%	FY2025 **7.3%** $379,000 of $5.2M · median town 11.5%	Net of state charges, FY2025 **6.4%** FY2010: 5.7% · median town 10.0%

Rowe's state aid kept pace with both price measures: FY2025 aid was 46.8% above its FY2006 aid grown by Boston-area consumer prices and 30.4% above grown by the government price index.

Gross state aid went from $167,000 in FY2006 to $379,000 in FY2025, +127.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+61.9%** $432,000 to $700,000 · all towns +54.0%	All fixed costs, FY2016–25 **+46.8%** $639,000 to $937,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rowe's health insurance would have been $540,000 in FY2025; it was $700,000, $160,000 above the path. Its fixed costs would have been $798,000 in FY2025; it was $937,000, $140,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rowe came to $0, 0.0% of the $268,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Rowe's required school contribution is 4.3% of median household income, 4th highest of 351.

Chapter 70 aid, FY2026 **$157,000** to the town's district	Required local contribution **$581,000** FY2026
Share of household income **4.3%** 4th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+39%** after inflation

Rowe runs its own school district.

EXPECTED AND ACTUAL

Rowe received $2.4 million in earmarks placed in the town and competitive grants over ten years, 46% of the $5.3 million its size, need and institutions predict.

PEERS

Rowe is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rowe this town	**53**	**$9,050**	**$5,291**	**$0**	**1.34**	**4.3%**
Hancock peer · lowest in class of 30	43	$9,560	$360	$0	0.91	2.9%
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Becket peer	50	$9,450	$3,826	$0	2.09	3.5%
Erving peer	50	$7,326	$3,750	$0	8.12	4.7%
Tolland peer	55	$10,826	$4,602	$11.32	1.82	1.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Rowley

Town · Essex County · 6,251 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Essex · Kristin E. Kassner

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Triton Regional School District, shared with Newbury and Salisbury
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Newburyport and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

Rowley scores 41 on the Fairness Index for all state aid and 34 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

205th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	51	39	36

Rank under other weightings: 189th to 220th.

Stable low: below 45 under every weighting

Rowley received less than its share of state aid on three of four measures; its blended score of 41 stays between 38 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

34 / 100

250th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	48	20	34

Rank under other weightings: 230th to 261st.

Stable low: below 45 under every weighting

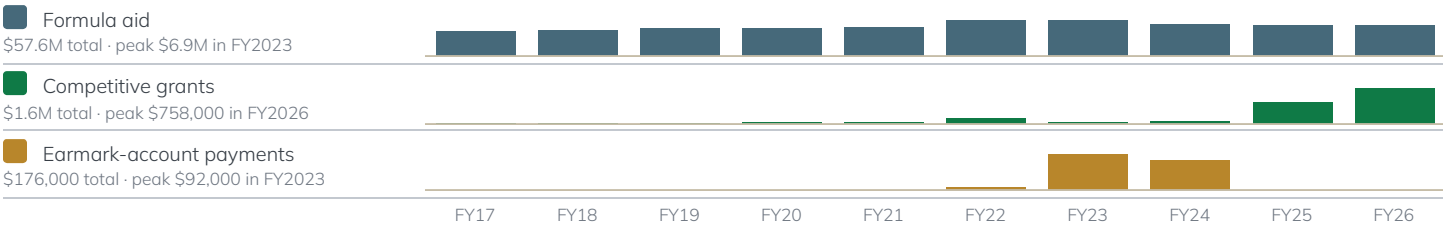
Rowley received less than its share of discretionary money on all four measures; its blended score of 34 stays between 30 and 39 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rowley's town government and school districts received $57.6 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$57.6M	$1.6M	$176,000
$9,213 per resident (209th of 351) · gross	$259 per resident (225th of 351)	$28.10 per resident (153rd of 351)

Competitive grants to Rowley peaked in FY2026 at $758,000, 47% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.9 million, are not shown.

EARMARKS

Rowley received $166,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$166,000	$166,000	$166,000	Not a member
$26.57 per resident (242nd of 351)	$26.57 per resident (253rd of 351)	$26.57 per resident (254th of 351)	35 municipalities had none

Placed in the town: nine clauses in five of ten budgets; the most recent in FY2026. Every one names Rowley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$25,000	"the town of Rowley for renovations, accessibility improvements, updates and repairs to the Rowley senior center"	Enacted names the town
FY2022	$25,000	"the town of Rowley for its war memorial restoration project"	Enacted names the town
FY2022	$25,000	"a public safety grant in the town of Rowley"	Enacted names the town
FY2026	$20,000	"the town of Rowley for a stormwater runoff collection and abatement system at the town landing to address significant erosion into the Rowley river..."	Enacted names the town
FY2025	$20,000	"the town of Rowley for structural and ADA improvements at Town Hall and the Senior Center"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rowley received 42% of its proportional share of competitive grant awards.

Local road miles **43.1** 276th of 351 · 6.9 per 1,000 residents (161st of 351)	Town-owned bridges, replacement cost **$3.7M** scored exposure $703,000 · one in poor condition	Road-stream crossings **87** 148th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **18.2 sq mi** 12% state-owned	Seasonal homes **0%** share of housing units	Peak service population **6,251** residents plus seasonal	Core infrastructure index **0.32** roads, culverts, dams, coast, flood, energy

Burden index 0.42; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,209 acres** 10.4% of land area · FY2026	State-owned land PILOT, FY2026 **$162,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$134** statewide $117 · FY2026	New growth per resident **$25,352** FY2017–2025 · 136th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.5% of Rowley's general-fund spending in FY2025, down from 8.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.4%** $993,000 of $11.9M · median town 14.1%	FY2016 **4.4%** $680,000 of $15.4M · median town 12.2%	FY2025 **3.5%** $914,000 of $26.4M · median town 11.5%	Net of state charges, FY2025 **3.0%** FY2010: 3.5% · median town 10.0%

Rowley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rowley's state aid did not keep pace with either price measure: FY2025 aid was 40.6% below its FY2006 aid grown by Boston-area consumer prices and 47.2% below grown by the government price index.

Gross state aid went from $993,000 in FY2006 to $914,000 in FY2025, −7.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+90.4%** $807,000 to $1.5M · all towns +54.0%	All fixed costs, FY2016–25 **+207.1%** $1.1M to $3.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rowley's health insurance would have been $1.01 million in FY2025; it was $1.54 million, $529,000 above the path. Its fixed costs would have been $1.42 million in FY2025; it was $3.49 million, $2.07 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+71%); health insurance changed by more than 30% in one year in FY2024 (+70%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rowley came to $129,000, 17.7% of the $729,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$129,000	17.7%	28.2%
Placed in the town	$129,000	17.7%	42.3%
Everything placed	$129,000	17.7%	45.2%

SCHOOLS

Rowley's required school contribution is 2.7% of median household income, 166th highest of 351.

Chapter 70 aid, FY2026 **$3.3M** attributed to the town	Required local contribution **$8.7M** FY2026
Share of household income **2.7%** 166th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Rowley has no school district of its own. Its pupils attend Rowley, Triton and Whittier; Rowley accounts for 100%, 33% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Rowley received $1.8 million in earmarks placed in the town and competitive grants over ten years, 60% of the $3 million its size, need and institutions predict.

PEERS

Rowley ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rowley this town	**41**	**$9,213**	**$259**	**$26.57**	**0.42**	**2.7%**
Stow peer	33	$7,771	$488	$90.02	2.17	2.4%
Groveland peer	52	$13,007	$476	$36.55	0.95	2.5%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Littleton peer	37	$7,885	$1,660	$62.74	5.22	3.1%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Royalston

Town · Worcester County · 1,460 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Franklin · Susannah M. Whipps

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Athol-Royalston Regional School District, shared with Athol
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY
Montachusett Regional Planning Commission

FAIRNESS INDEX

Royalston scores 59 on the Fairness Index for all state aid and 91 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

54th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	55	54	65

Rank under other weightings: 46th to 63rd.

Stable high: above 55 under every weighting

Royalston received more than its share of state aid on all four measures; its blended score of 59 stays between 56 and 61 under every weighting tested.

DISCRETIONARY MONEY ONLY

91 / 100

39th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
92	91	87	94

Rank under other weightings: 36th to 42nd.

Stable high: above 55 under every weighting

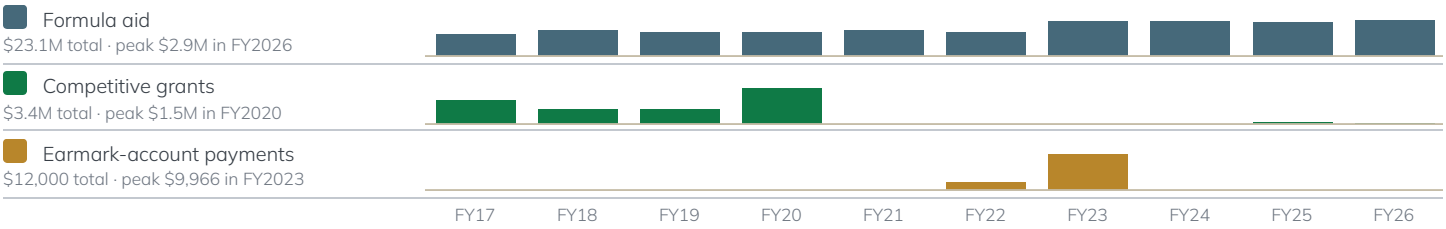
Royalston received more than its share of discretionary money on all four measures; its blended score of 91 stays between 90 and 92 under every weighting tested.

STATE MONEY, FY2017–FY2026

Royalston's town government and school districts received $23.1 million in formula aid and $3.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$23.1M	$3.4M	$12,000
$15,842 per resident (64th of 351) · gross	$2,316 per resident (41st of 351)	$8.42 per resident (267th of 351)

Competitive grants to Royalston peaked in FY2020 at $1.5 million, 44% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.4 million, are not shown.

EARMARKS

Royalston received $60,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$60,000	$60,000	$60,000	Not a member
$41.10 per resident (180th of 351)	$41.10 per resident (199th of 351)	$41.10 per resident (202nd of 351)	35 municipalities had none

Placed in the town: two clauses in one of ten budgets; the most recent in FY2023. Every one names Royalston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$50,000	"the purchase of a pickup truck for the Royalston fire department"	Enacted names the town
FY2023	$10,000	"the town of Royalston for fire safety equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Royalston received about its proportional share of competitive grant awards.

Local road miles **69.5** 189th of 351 · 47.6 per 1,000 residents (29th of 351)	Town-owned bridges, replacement cost **$14.7M** scored exposure $4.1M · two in poor condition	Road-stream crossings **59** 232nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **41.8 sq mi** 22% state-owned	Seasonal homes **9%** share of housing units	Peak service population **1,613** residents plus seasonal	Core infrastructure index **0.91** roads, culverts, dams, coast, flood, energy

Burden index 0.96; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,107 acres** 19.1% of land area · FY2026	State-owned land PILOT, FY2026 **$156,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$30.48** statewide $117 · FY2026	New growth per resident **$12,496** FY2017–2025 · 285th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.0% of Royalston's general-fund spending in FY2025, up from 12.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.8%** $216,000 of $1.7M · median town 14.1%	FY2016 **12.7%** $271,000 of $2.1M · median town 12.2%	FY2025 **14.0%** $385,000 of $2.8M · median town 11.5%	Net of state charges, FY2025 **13.9%** FY2010: 13.3% · median town 10.0%

Royalston's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Royalston's state aid kept pace with both price measures: FY2025 aid was 15.3% above its FY2006 aid grown by Boston-area consumer prices and 2.5% above grown by the government price index.

Gross state aid went from $216,000 in FY2006 to $385,000 in FY2025, +78.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–43.5%** $45,000 to $25,000 · all towns +54.0%	All fixed costs, FY2016–25 **+29.9%** $151,000 to $196,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Royalston's health insurance would have been $56,000 in FY2025; it was $25,000, $31,000 below the path. Its fixed costs would have been $188,000 in FY2025; it was $196,000, $7,634 above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (–41%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Royalston's reported health insurance fell from $45,000 in FY2016 to $25,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$60,000	no increase	28.2%
Placed in the town	$60,000	no increase	42.3%
Everything placed	$60,000	no increase	45.2%

SCHOOLS

Royalston's required school contribution is 1.5% of

EXPECTED AND ACTUAL

Royalston received $3.4 million in earmarks placed in the town and competitive grants over ten years, 74%

median household income, 338th highest of 351.

Chapter 70 aid, FY2026 **$1.4M** attributed to the town	Required local contribution **$806,000** FY2026
Share of household income **1.5%** 338th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Royalston has no school district of its own. Its pupils attend Athol-Royalston and Montachusett; Royalston accounts for 6% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

of the $4.7 million its size, need and institutions predict.

PEERS

Royalston ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Royalston this town	**59**	**$15,842**	**$2,316**	**$41.10**	**0.96**	**1.5%**
Shelburne peer	66	$14,126	$8,461	$182	2.94	3.0%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Russell

Town · Hampden County · 1,197 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Hampden · Nicholas A. Boldyga

STATE SENATE
Hampden and Hampshire · John C. Velis

SCHOOL DISTRICTS
Gateway Regional School District, shared with Blandford, Chester, Huntington, Middlefield and Montgomery

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Russell scores 73 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

73 / 100

7th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
77	77	68	70

Rank under other weightings: 6th to 12th.

Stable high: above 55 under every weighting

Russell received more than its share of state aid on all four measures; its blended score of 73 stays between 71 and 76 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

7th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	95	97

Rank under other weightings: 6th to 9th.

Stable high: above 55 under every weighting

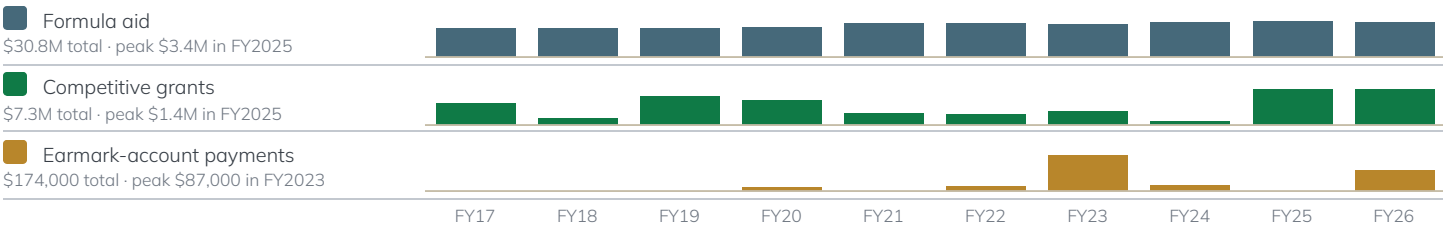
Russell received more than its share of discretionary money on all four measures; its blended score of 97 stays between 97 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Russell's town government and school districts received $30.8 million in formula aid and $7.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$30.8M	**$7.3M**	**$174,000**
$25,758 per resident (9th of 351) · gross	$6,140 per resident (11th of 351)	$146 per resident (12th of 351)

Competitive grants to Russell were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.7 million, are not shown.

EARMARKS

Russell received $135,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$135,000	**$135,000**	**$135,000**	**Not a member**
$113 per resident (34th of 351)	$113 per resident (56th of 351)	$113 per resident (62nd of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2026. Every one names Russell directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$50,000	"the town of Russell for the replacement of playground equipment"	Enacted names the town
FY2025	$50,000	"the Russell council on aging to purchase a new vehicle"	Enacted names the town
FY2024	$25,000	"technological upgrades and improvements to public works equipment and facilities in the town of Russell"	Enacted names the town
FY2020	$10,000 (split four ways)	"equally between the municipalities of Russell, Southampton, Montgomery and Westfield for the maintenance and repair of war memorials"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Russell received 1.29 times its proportional share of competitive grant awards.

Local road miles **22.3** 336th of 351 · 18.6 per 1,000 residents (63rd of 351)	Town-owned bridges, replacement cost **$10.8M** scored exposure $7.1M · two in poor condition	Road-stream crossings **53** 249th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.5 sq mi** 7% state-owned	Seasonal homes **1%** share of housing units	Peak service population **1,212** residents plus seasonal	Core infrastructure index **0.35** roads, culverts, dams, coast, flood, energy

Burden index 1.29; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **617 acres** 5.5% of land area · FY2026	State-owned land PILOT, FY2026 **$6,630** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$10.74** statewide $117 · FY2026	New growth per resident **$18,867** FY2017–2025 · 204th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.3% of Russell's general-fund spending in FY2025, down from 15.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.4%** $393,000 of $2.6M · median town 14.1%	FY2016 **11.9%** $424,000 of $3.6M · median town 12.2%	FY2025 **10.3%** $545,000 of $5.3M · median town 11.5%	Net of state charges, FY2025 **10.0%** FY2010: 13.7% · median town 10.0%

Russell's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Russell's state aid did not keep pace with either price measure: FY2025 aid was 10.5% below its FY2006 aid grown by Boston-area consumer prices and 20.4% below grown by the government price index.

Gross state aid went from $393,000 in FY2006 to $545,000 in FY2025, +38.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+133.9%** $71,000 to $166,000 · all towns +54.0%	All fixed costs, FY2016–25 **+98.7%** $236,000 to $469,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Russell's health insurance would have been $89,000 in FY2025; it was $166,000, $77,000 above the path. Its fixed costs would have been $295,000 in FY2025; it was $469,000, $174,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Russell came to $85,000, 89.4% of the $95,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$85,000	89.4%	28.2%
Placed in the town	$85,000	89.4%	42.3%
Everything placed	$85,000	89.4%	45.2%

SCHOOLS

Russell's required school contribution is 2.4% of

EXPECTED AND ACTUAL

Russell received $7.5 million in earmarks placed in the town and competitive grants over ten years, 2.1 times the $3.6 million its size, need and institutions predict.

median household income, 250th highest of 351.

Chapter 70 aid, FY2026 **$2.1M** attributed to the town	Required local contribution **$1.5M** FY2026
Share of household income **2.4%** 250th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Russell has no school district of its own. Its pupils attend Russell and Gateway; Russell accounts for 100% and 25% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Russell ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Russell this town	**73**	**$25,758**	**$6,140**	**$113**	**1.29**	**2.4%**
Westhampton peer · lowest in class of 30	42	$11,067	$887	$0	0.62	3.3%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
Pelham peer	47	$13,701	$594	$11.86	2.69	2.5%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
Petersham peer	56	$19,509	$612	$0	0.99	2.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Rutland

Town · Worcester County · 9,353 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Worcester · Kimberly N. Ferguson

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Wachusett Regional School District, shared with Holden, Paxton, Princeton and Sterling

Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Oxford, Paxton, Southbridge, Spencer and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Rutland scores 59 on the Fairness Index for all state aid and 18 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

51st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	68	48	59

Rank under other weightings: 40th to 72nd.

Stable high: above 55 under every weighting

Rutland received more than its share of state aid on three of four measures; its blended score of 59 stays between 56 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

18 / 100

323rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
16	22	16	16

Rank under other weightings: 320th to 326th.

Stable low: below 45 under every weighting

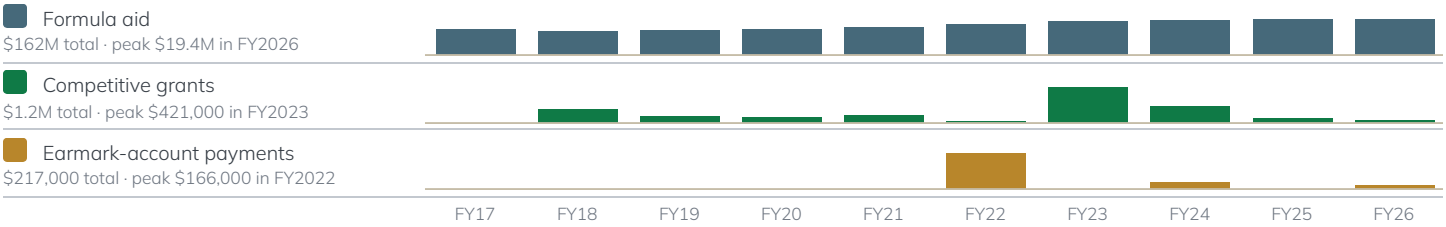
Rutland received less than its share of discretionary money on all four measures; its blended score of 18 stays between 17 and 18 under every weighting tested.

STATE MONEY, FY2017–FY2026

Rutland's town government and school districts received $162 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$162M	**$1.2M**	**$217,000**
$17,290 per resident (47th of 351) · gross	$124 per resident (307th of 351)	$23.21 per resident (184th of 351)

Competitive grants to Rutland peaked in FY2023 at $421,000, 36% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.4 million, are not shown.

EARMARKS

Rutland received $206,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$206,000	**$206,000**	**$206,000**	**Not a member**
$22.03 per resident (260th of 351)	$22.03 per resident (269th of 351)	$22.03 per resident (270th of 351)	35 municipalities had none

Placed in the town: seven clauses in five of ten budgets; the most recent in FY2026. Every one names Rutland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$50,000	"the preservation, protection, signage and maintenance of historic prison camp structures in the town of Rutland"	Enacted names the town
FY2024	$33,000	"the preservation, protection, signage and maintenance of historic prison camp structures in the town of Rutland"	Enacted names the town
FY2026	$30,000	"the town of Rutland to conduct a study on the feasibility of establishing or joining a regional fire district"	Enacted names the town
FY2022	$25,000	"the historic Wood House in the town of Rutland"	Enacted names the town
FY2019	$25,000	"the renovation of the Old Rutland Fire House and Museum and to commemorate the 125th anniversary of the Rutland volunteer fire brigade"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Rutland received 61% of its proportional share of competitive grant awards.

Local road miles **80.9** 154th of 351 · 8.6 per 1,000 residents (125th of 351)	Town-owned bridges, replacement cost **$8.6M** scored exposure $1.8M · none in poor condition	Road-stream crossings **94** 132nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **35.1 sq mi** 33% state-owned	Seasonal homes **4%** share of housing units	Peak service population **9,756** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.61; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **925 acres** 4.1% of land area · FY2026	State-owned land PILOT, FY2026 **$114,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$123** statewide $117 · FY2026	New growth per resident **$24,848** FY2017–2025 · 140th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.6% of Rutland's general-fund spending in FY2025, down from 7.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.3%** $886,000 of $12.1M · median town 14.1%	FY2016 **10.2%** $1.9M of $18.4M · median town 12.2%	FY2025 **4.6%** $1.3M of $28.5M · median town 11.5%	Net of state charges, FY2025 **4.4%** FY2010: 12.4% · median town 10.0%

Rutland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $12.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Rutland's state aid did not keep pace with either price measure: FY2025 aid was 4.8% below its FY2006 aid grown by Boston-area consumer prices and 15.4% below grown by the government price index.

Gross state aid went from $886,000 in FY2006 to $1.3 million in FY2025, +47.6% in dollars. Flag: in FY2010, $864,000 of Rutland's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+55.5%** $584,000 to $908,000 · all towns +54.0%	All fixed costs, FY2016–25 **+109.5%** $1.2M to $2.5M · all towns +53.0%	Years squeezed **9 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Rutland's health insurance would have been $729,000 in FY2025; it was $908,000, $179,000 above the path. Its fixed costs would have been $1.51 million in FY2025; it was $2.53 million, $1.02 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Rutland came to $176,000, 54.3% of the $324,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$176,000	54.3%	28.2%
Placed in the town	$176,000	54.3%	42.3%
Everything placed	$176,000	54.3%	45.2%

SCHOOLS

Rutland's required school contribution is 2.2% of median household income, 286th highest of 351.

Chapter 70 aid, FY2026 **$13.4M** attributed to the town	Required local contribution **$10.4M** FY2026
Share of household income **2.2%** 286th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

Rutland has no school district of its own. Its pupils attend Wachusett and Southern Worcester; Rutland accounts for 24% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Rutland received $1.5 million in earmarks placed in the town and competitive grants over ten years, 28% of the $5.3 million its size, need and institutions predict.

PEERS

Rutland ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Rutland this town	**59**	**$17,290**	**$124**	**$22.03**	**0.61**	**2.2%**
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Lancaster peer	36	$8,666	$286	$63.33	0.91	2.5%
Berkley peer	51	$12,903	$95.35	$13.91	0.18	2.7%
Paxton peer	40	$9,789	$93.21	$32.99	0.11	2.5%
Uxbridge peer	48	$11,199	$436	$15.55	1.22	2.8%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Salem

City · Essex County · 44,795 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Essex · Manny Cruz

STATE SENATE

Second Essex · Joan B. Lovely

SCHOOL DISTRICTS

Salem Public Schools, the city's own district

Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Salem scores 46 on the Fairness Index for all state aid and 78 for discretionary money. Fifty is a fair share.

ALL STATE AID

46 / 100

155th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	39	54	45

Rank under other weightings: 129th to 190th.

Weighting-dependent: the range crosses the 45–55 band

Salem received less than its share of state aid on three of four measures; its blended score of 46 stays between 44 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

78 / 100

83rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
78	73	80	78

Rank under other weightings: 78th to 86th.

Stable high: above 55 under every weighting

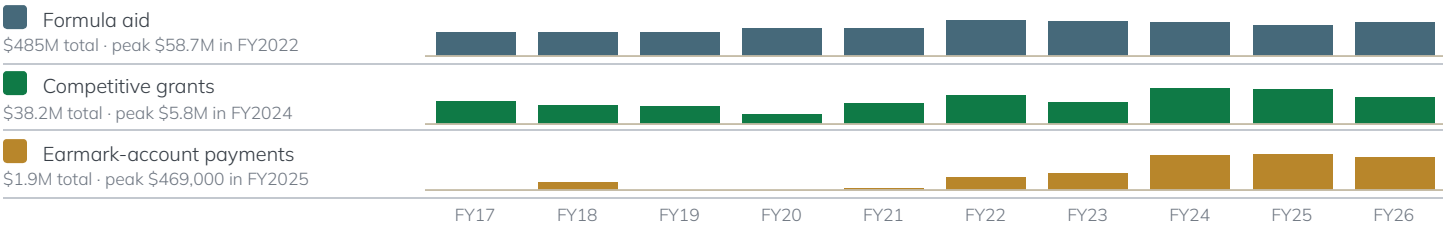
Salem received more than its share of discretionary money on all four measures; its blended score of 78 stays between 76 and 79 under every weighting tested.

STATE MONEY, FY2017–FY2026

Salem's town government and school districts received $485 million in formula aid and $38.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$485M	**$38.2M**	**$1.9M**
$10,823 per resident (154th of 351) · gross	$853 per resident (86th of 351)	$41.84 per resident (103rd of 351)

Competitive grants to Salem were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $103 million, are not shown.

EARMARKS

Salem received $4.5 million in local earmarks naming the town, $7 million placed in the town and $7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.5M	**$7M**	**$7M**	**Not a member**
$101 per resident (47th of 351)	$157 per resident (21st of 351)	$157 per resident (27th of 351)	35 municipalities had none

Placed in the town: 63 clauses in ten of ten budgets; the most recent in FY2026. $4.5 million came in clauses that name Salem; the other $2.5 million went to organizations based in Salem, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$2.5M	"building costs for North Shore Community Health, Inc. to support the capital project of building a new Salem family health facility to enhance and..."	Enacted names the town
FY2024	$250,000	"the city of Salem to support a Massachusetts national guard indoor historical exhibit recognizing the city of Salem as the birthplace of the national..."	Enacted names the town
FY2023	$200,000	"the Salem Family Resource and Welcome Center"	Enacted names the town
FY2025	$167,000	"the Essex county court-appointed special advocates program"	Enacted recipient based here
FY2024	$167,000	"the Essex county court-appointed special advocates program"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Salem received 2.62 times its proportional share of competitive grant awards.

Local road miles **89.9** 122nd of 351 · 2.0 per 1,000 residents (336th of 351)	Town-owned bridges, replacement cost **$21.8M** scored exposure $9.5M · two in poor condition	Road-stream crossings **48** 270th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **8.3 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **45,010** residents plus seasonal	Core infrastructure index **4.20** roads, culverts, dams, coast, flood, energy

Burden index 2.62; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **33 acres** 0.6% of land area · FY2026	State-owned land PILOT, FY2026 **$125,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,733** statewide $117 · FY2026	New growth per resident **$21,048** FY2017–2025 · 171st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 22.3% of Salem's general-fund spending in FY2025, down from 27.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.2%** $25.9M of $95.2M · median town 14.1%	FY2016 **23.6%** $30.2M of $128M · median town 12.2%	FY2025 **22.3%** $40.4M of $181M · median town 11.5%	Net of state charges, FY2025 **16.3%** FY2010: 16.6% · median town 10.0%

Salem's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Salem's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 0.6% above its FY2006 aid grown by Boston-area consumer prices and 10.6% below grown by the government price index.

Gross state aid went from $25.9 million in FY2006 to $40.4 million in FY2025, +56.0% in dollars. Flag: in FY2010, $4.4 million of Salem's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+53.3%** $11.6M to $17.7M · all towns +54.0%	All fixed costs, FY2016–25 **+51.1%** $23.6M to $35.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Salem's health insurance would have been $14.4 million in FY2025; it was $17.7 million, $3.29 million above the path. Its fixed costs would have been $29.5 million in FY2025; it was $35.7 million, $6.20 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Salem came to $4.3 million, 69.3% of the $6.17 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.3M	69.3%	28.2%
Placed in the town	$6.4M	103.7%	42.3%
Everything placed	$6.4M	103.7%	45.2%

SCHOOLS

Salem's required school contribution is 2.9% of median household income, 96th highest of 351.

Chapter 70 aid, FY2026 **$32.4M** to the town's district	Required local contribution **$50.4M** FY2026
Share of household income **2.9%** 96th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Salem runs its own school district and also belongs to Essex North Shore; Salem accounts for 11% of that district's foundation budget.

EXPECTED AND ACTUAL

Salem received $54.3 million in earmarks placed in the town and competitive grants over ten years, 2.0 times the $27.1 million its size, need and institutions predict.

PEERS

Salem ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Salem this town	**46**	**$10,823**	**$853**	**$157**	**2.62**	**2.9%**
Northampton peer	28	$6,641	$603	$73.53	1.28	3.1%
Marlborough peer	53	$13,835	$804	$65.97	1.57	3.4%
Peabody peer	39	$9,164	$124	$37.72	0.34	3.1%
Fairhaven peer	47	$10,747	$508	$12.58	0.36	2.8%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Salisbury

Town · Essex County · 9,281 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Essex · Dawne Shand

STATE SENATE
First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS
Triton Regional School District, shared with Newbury and Rowley
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Newburyport and two others

REGIONAL PLANNING AGENCY
Merrimack Valley Planning Commission

FAIRNESS INDEX

Salisbury scores 38 on the Fairness Index for all state aid and 79 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

237th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	39	44	34

Rank under other weightings: 216th to 260th.

Stable low: below 45 under every weighting

Salisbury received less than its share of state aid on all four measures; its blended score of 38 stays between 36 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

79 / 100

78th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
81	83	71	80

Rank under other weightings: 72nd to 84th.

Stable high: above 55 under every weighting

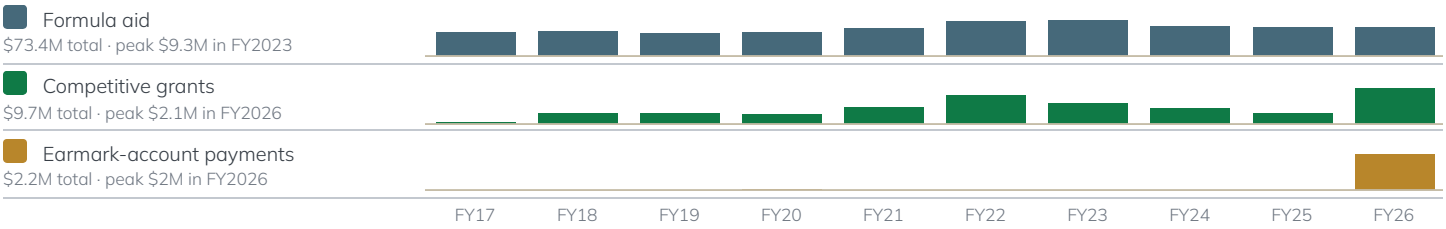
Salisbury received more than its share of discretionary money on all four measures; its blended score of 79 stays between 77 and 81 under every weighting tested.

STATE MONEY, FY2017–FY2026

Salisbury's town government and school districts received $73.4 million in formula aid and $9.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$73.4M	$9.7M	$2.2M
$7,912 per resident (258th of 351) · gross	$1,047 per resident (76th of 351)	$233 per resident (5th of 351)

Competitive grants to Salisbury peaked in FY2026 at $2.1 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $14.7 million, are not shown.

EARMARKS

Salisbury received $336,000 in local earmarks naming the town, $351,000 placed in the town and $351,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$336,000	$351,000	$351,000	Not a member
$36.15 per resident (204th of 351)	$37.77 per resident (212th of 351)	$37.77 per resident (215th of 351)	35 municipalities had none

Placed in the town: 21 clauses in nine of ten budgets; the most recent in FY2026. $336,000 came in clauses that name Salisbury; the other $15,000 went to organizations based in Salisbury, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$50,000	"Salisbury Beach Partnership, Inc. toward the construction of a carousel pavilion at Salisbury beach in the town of Salisbury"	Enacted names the town
FY2026	$25,000 (split three ways)	"capacity expansion and innovative food storage and delivery programs for Our Neighbors' Table, Inc. serving the cities of Amesbury and Newburyport…"	Enacted names the town
FY2024	$25,000	"the Partridge Brook park in the city of Salisbury"	Enacted names the town
FY2024	$25,000	"the historic carousel at Salisbury beach in the town of Salisbury"	Enacted names the town
FY2025	$20,000	"technical assistance in resiliency planning and grant applications for the town of Salisbury"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Salisbury received 1.32 times its proportional share of competitive grant awards.

Local road miles **36.6** 303rd of 351 · 3.9 per 1,000 residents (279th of 351)	Town-owned bridges, replacement cost **$898,000** scored exposure $99,000 · none in poor condition	Road-stream crossings **29** 317th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.4 sq mi** 17% state-owned	Seasonal homes **14%** share of housing units	Peak service population **10,831** residents plus seasonal	Core infrastructure index **0.66** roads, culverts, dams, coast, flood, energy

Burden index 1.32; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,339 acres** 13.6% of land area · FY2026	State-owned land PILOT, FY2026 **$673,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$503** statewide $117 · FY2026	New growth per resident **$34,714** FY2017–2025 · 82nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.7% of Salisbury's general-fund spending in FY2025, down from 5.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.4%** $818,000 of $15.2M · median town 14.1%	FY2016 **5.2%** $1.1M of $21.8M · median town 12.2%	FY2025 **4.7%** $1.7M of $35.4M · median town 11.5%	Net of state charges, FY2025 **4.2%** FY2010: 4.1% · median town 10.0%

Salisbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Salisbury's state aid kept pace with both price measures: FY2025 aid was 30.3% above its FY2006 aid grown by Boston-area consumer prices and 15.8% above grown by the government price index.

Gross state aid went from $818,000 in FY2006 to $1.7 million in FY2025, +102.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.3%** $1.1M to $1.7M · all towns +54.0%	All fixed costs, FY2016–25 **+90.0%** $2.4M to $4.6M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Salisbury's health insurance would have been $1.35 million in FY2025; it was $1.67 million, $318,000 above the path. Its fixed costs would have been $3.04 million in FY2025; it was $4.63 million, $1.59 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Salisbury came to $311,000, 52.8% of the $588,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$311,000	52.8%	28.2%
Placed in the town	$311,000	52.8%	42.3%
Everything placed	$311,000	52.8%	45.2%

SCHOOLS

Salisbury's required school contribution is 2.7% of median household income, 157th highest of 351.

Chapter 70 aid, FY2026 **$3.9M** attributed to the town	Required local contribution **$10.4M** FY2026
Share of household income **2.7%** 157th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Salisbury has no school district of its own. Its pupils attend Salisbury, Triton and Whittier; Salisbury accounts for 100%, 38% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Salisbury received $10.1 million in earmarks placed in the town and competitive grants over ten years, 85% more than the $5.5 million its size, need and institutions predict.

PEERS

Salisbury ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Salisbury this town	**38**	**$7,912**	**$1,047**	**$37.77**	**1.32**	**2.7%**
Raynham peer	43	$11,019	$86.59	$57.40	0.94	2.8%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%
Hamilton peer	30	$8,144	$188	$33.29	0.53	3.4%
Westport peer	30	$6,951	$107	$52.17	0.45	3.2%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Great Barrington best in class of 30	42	$9,461	$2,113	$175	2.92	3.7%
Sheffield lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Sandisfield

Town · Berkshire County · 994 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Farmington River Regional School District, shared with Otis

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Sandisfield scores 43 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

186th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	53	30	41

Rank under other weightings: 153rd to 225th.

Weighting-dependent: the range crosses the 45–55 band

Sandisfield received less than its share of state aid on three of four measures; its blended score of 43 stays between 38 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100

55th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
90	92	73	88

Rank under other weightings: 46th to 63rd.

Stable high: above 55 under every weighting

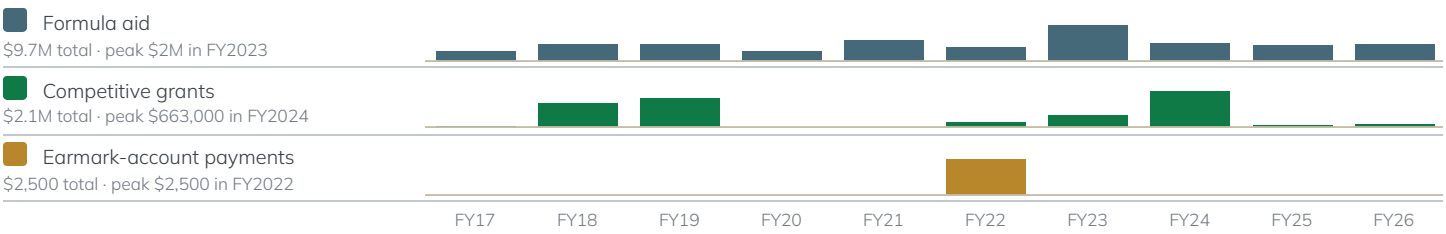
Sandisfield received more than its share of discretionary money on all four measures; its blended score of 86 stays between 83 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sandisfield's town government and school districts received $9.7 million in formula aid and $2.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$9.7M	**$2.1M**	**$2,500**
$9,713 per resident (187th of 351) · gross	$2,087 per resident (44th of 351)	$2.52 per resident (310th of 351)

Competitive grants to Sandisfield peaked in FY2024 at $663,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 994 residents, a single payment moves Sandisfield's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $759,000, are not shown.

EARMARKS

No local earmark was placed in Sandisfield in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to Sandisfield's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Sandisfield.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Sandisfield's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Whately	$43,000	$43,000	$43,000	$28.91
Hinsdale	$0	$0	$0	$0
West Stockbridge	$0	$0	$0	$0
Richmond	$0	$0	$0	$0
Tolland	$6,111	$6,111	$6,111	$11.32

WHAT THE TOWN CARRIES

Measured against what it maintains, Sandisfield received 34% of its proportional share of competitive grant awards.

Local road miles **80.9** 153rd of 351 · 81.4 per 1,000 residents (5th of 351)	Town-owned bridges, replacement cost **$22.6M** scored exposure $7.5M · two in poor condition	Road-stream crossings **128** 65th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **51.8 sq mi** 24% state-owned	Seasonal homes **35%** share of housing units	Peak service population **1,609** residents plus seasonal	Core infrastructure index **0.32** roads, culverts, dams, coast, flood, energy

Burden index 0.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5,875 acres** 17.7% of land area · FY2026	State-owned land PILOT, FY2026 **$135,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$23.05** statewide $117 · FY2026	New growth per resident **$17,630** FY2017–2025 · 219th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.7% of Sandisfield's general-fund spending in FY2025, up from 3.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.5%** $72,000 of $2M · median town 14.1%	FY2016 **5.6%** $153,000 of $2.7M · median town 12.2%	FY2025 **5.7%** $218,000 of $3.8M · median town 11.5%	Net of state charges, FY2025 **3.8%** FY2010: 3.5% · median town 10.0%

Sandisfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $408,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sandisfield's state aid kept pace with both price measures: FY2025 aid was 95.9% above its FY2006 aid grown by Boston-area consumer prices and 74.1% above grown by the government price index.

Gross state aid went from $72,000 in FY2006 to $218,000 in FY2025, +203.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+96.6%** $38,000 to $75,000 · all towns +54.0%	All fixed costs, FY2016–25 **+45.9%** $193,000 to $282,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sandisfield's health insurance would have been $47,000 in FY2025; it was $75,000, $27,000 above the path. Its fixed costs would have been $242,000 in FY2025; it was $282,000, $41,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+38%), FY2018 (+42%), FY2020 (+40%), FY2021 (–34%), FY2023 (+42%) and FY2024 (–32%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sandisfield came to $0, 0.0% of the $37,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Sandisfield's required school contribution is 3.1% of median household income, 46th highest of 351.

Chapter 70 aid, FY2026 **$362,000** attributed to the town	Required local contribution **$1M** FY2026
Share of household income **3.1%** 46th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+54%** after inflation

Sandisfield has no school district of its own. Its pupils attend Farmington River; Sandisfield accounts for 40% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Sandisfield received $2.1 million in earmarks placed in the town and competitive grants over ten years, 78% of the $2.7 million its size, need and institutions predict.

PEERS

Sandisfield is one of five municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sandisfield this town	**43**	**$9,713**	**$2,087**	**$0**	**0.34**	**3.1%**
Whately peer	45	$9,968	$1,484	$28.91	1.02	2.4%
Hinsdale peer · lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%
West Stockbridge peer	43	$9,304	$478	$0	0.46	2.4%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Tolland peer	55	$10,826	$4,602	$11.32	1.82	1.1%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Sandwich

Town · Barnstable County · 20,522 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Barnstable · Steven George Xiarhos

STATE SENATE

Plymouth and Barnstable · Dylan A. Fernandes

SCHOOL DISTRICTS

Sandwich Public Schools, the town's own district

Upper Cape Cod Regional Vocational Technical School District, vocational, shared with Bourne, Falmouth, Marion and Wareham

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Sandwich scores 30 on the Fairness Index for all state aid and 43 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

301st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	36	32	25

Rank under other weightings: 294th to 312th.

Stable low: below 45 under every weighting

Sandwich received less than its share of state aid on all four measures; its blended score of 30 stays between 29 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

43 / 100

209th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	50	43	37

Rank under other weightings: 204th to 216th.

Weighting-dependent: the range crosses the 45–55 band

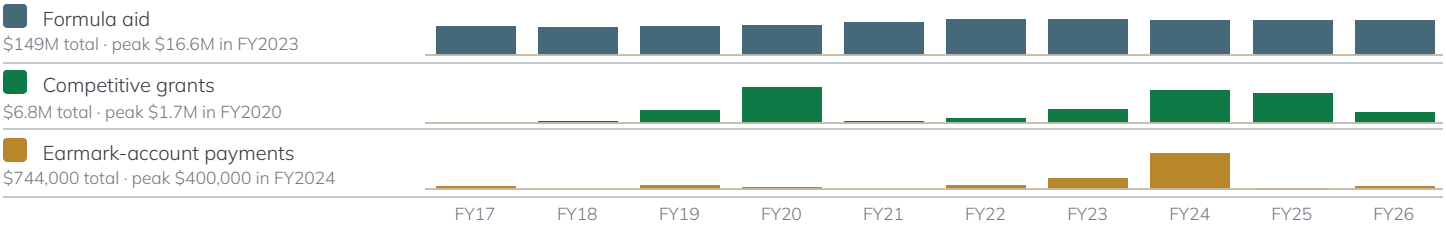
Sandwich received less than its share of discretionary money on three of four measures; its blended score of 43 stays between 41 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sandwich's town government and school districts received $149 million in formula aid and $6.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$149M	$6.8M	$744,000
$7,257 per resident (280th of 351) · gross	$332 per resident (195th of 351)	$36.27 per resident (123rd of 351)

Competitive grants to Sandwich peaked in FY2020 at $1.7 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $21 million, are not shown.

EARMARKS

Sandwich received $507,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$507,000	$507,000	$507,000	Not a member
$24.72 per resident (249th of 351)	$24.72 per resident (259th of 351)	$24.72 per resident (260th of 351)	35 municipalities had none

Placed in the town: 24 clauses in seven of ten budgets; the most recent in FY2026. Every one names Sandwich directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$50,000	"the purchase of an emergency generator located at the department of public works in the town of Sandwich"	Enacted names the town
FY2023	$40,000	"the town of Sandwich for storm response equipment"	Enacted names the town
FY2022	$33,000 (split three ways)	"the collaboration of law enforcement and community health centers, hospitals and nonprofits in the towns of Bourne, Falmouth and Sandwich to provide…"	Enacted names the town
FY2025	$30,000	"the town of Sandwich for recreation area improvements"	Enacted names the town
FY2023	$30,000	"mental health response, management and education in the town of Sandwich"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sandwich received 71% of its proportional share of competitive grant awards.

Local road miles **149.8** 35th of 351 · 7.3 per 1,000 residents (150th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **39** 296th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **42.9 sq mi** 23% state-owned	Seasonal homes **13%** share of housing units	Peak service population **23,662** residents plus seasonal	Core infrastructure index **0.39** roads, culverts, dams, coast, flood, energy

Burden index 0.71; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **9,099 acres** 33.2% of land area · FY2026	State-owned land PILOT, FY2026 **$1.1M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$122** statewide $117 · FY2026	New growth per resident **$37,022** FY2017–2025 · 73rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.3% of Sandwich's general-fund spending in FY2025, down from 16.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **16.3%** $9.1M of $55.8M · median town 14.1%	FY2016 **14.4%** $10.5M of $73.1M · median town 12.2%	FY2025 **11.3%** $11.7M of $104M · median town 11.5%	Net of state charges, FY2025 **6.3%** FY2010: 13.8% · median town 10.0%

Sandwich's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $589,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sandwich's state aid did not keep pace with either price measure: FY2025 aid was 17.3% below its FY2006 aid grown by Boston-area consumer prices and 26.5% below grown by the government price index.

Gross state aid went from $9.1 million in FY2006 to $11.7 million in FY2025, +28.2% in dollars. Flag: in FY2010, $1.4 million of Sandwich's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+58.8%** $8.6M to $13.7M · all towns +54.0%	All fixed costs, FY2016–25 **+65.8%** $12.6M to $20.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sandwich's health insurance would have been $10.7 million in FY2025; it was $13.7 million, $2.92 million above the path. Its fixed costs would have been $15.8 million in FY2025; it was $20.9 million, $5.16 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2021 (+44%), FY2023 (+44%) and FY2025 (+47%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sandwich came to $452,000, 8.9% of the $5.06 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$452,000	8.9%	28.2%
Placed in the town	$452,000	8.9%	42.3%
Everything placed	$452,000	8.9%	45.2%

SCHOOLS

Sandwich's required school contribution is 2.7% of median household income, 172nd highest of 351.

Chapter 70 aid, FY2026 **$8.7M** to the town's district	Required local contribution **$27.4M** FY2026
Share of household income **2.7%** 172nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

Sandwich runs its own school district and also belongs to Upper Cape Cod; Sandwich accounts for 19% of that district's foundation budget.

EXPECTED AND ACTUAL

Sandwich received $7.6 million in earmarks placed in the town and competitive grants over ten years, 94% of the $8 million its size, need and institutions predict.

PEERS

Sandwich ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sandwich this town	**30**	**$7,257**	**$332**	**$24.72**	**0.71**	**2.7%**
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Saugus

Town · Essex County · 28,773 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Essex · Donald H. Wong 81% of residents
16th Suffolk · Jessica Ann Giannino 19% of residents

Saugus is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS

Saugus Public Schools, the town's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Stoneham, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Saugus scores 29 on the Fairness Index for all state aid and 15 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

318th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	30	33	23

Rank under other weightings: 301st to 332nd.

Stable low: below 45 under every weighting

Saugus received less than its share of state aid on all four measures; its blended score of 29 stays between 27 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

15 / 100

332nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
15	16	18	12

Rank under other weightings: 327th to 334th.

Stable low: below 45 under every weighting

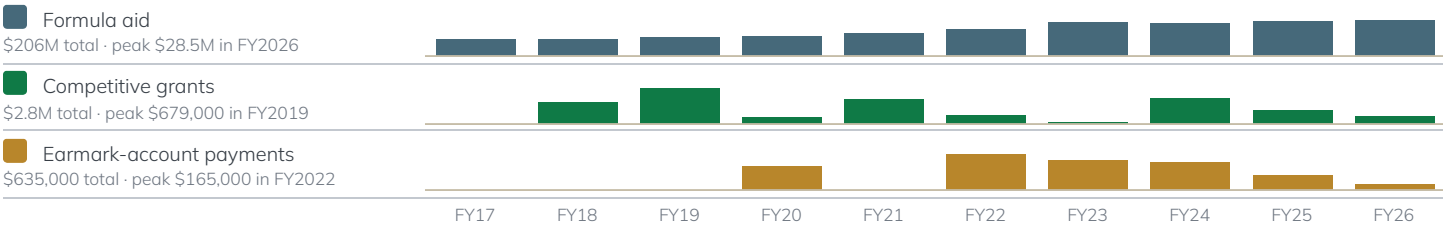
Saugus received less than its share of discretionary money on all four measures; its blended score of 15 stays between 14 and 16 under every weighting tested.

STATE MONEY, FY2017–FY2026

Saugus's town government and school districts received $206 million in formula aid and $2.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$206M	**$2.8M**	**$635,000**
$7,158 per resident (285th of 351) · gross	$98.00 per resident (325th of 351)	$22.07 per resident (192nd of 351)

Competitive grants to Saugus peaked in FY2019 at $679,000, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $24.8 million, are not shown.

EARMARKS

Saugus received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$1.2M**	**$1.2M**	**Not a member**
$42.11 per resident (172nd of 351)	$42.11 per resident (192nd of 351)	$42.11 per resident (195th of 351)	35 municipalities had none

Placed in the town: 26 clauses in ten of ten budgets; the most recent in FY2026. Every one names Saugus directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$90,000	"the police department in the town of Saugus to acquire portable radios"	Enacted names the town
FY2024	$75,000	"20 sets of bunker gear shorts in the town of Saugus"	Enacted names the town
FY2024	$75,000	"an additional public safety radio repeater system for the new middle-high school complex in the town of Saugus"	Enacted names the town
FY2022	$75,000	"the town of Saugus Fire Department for EFJ VP portable radios"	Enacted names the town
FY2025	$65,000	"the purchase of gear and equipment for Saugus fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Saugus received 36% of its proportional share of competitive grant awards.

Local road miles **90.8** 119th of 351 · 3.2 per 1,000 residents (310th of 351)	Town-owned bridges, replacement cost **$6.7M** scored exposure $2M · one in poor condition	Road-stream crossings **95** 128th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **10.8 sq mi** 16% state-owned	Seasonal homes **0%** share of housing units	Peak service population **28,916** residents plus seasonal	Core infrastructure index **0.51** roads, culverts, dams, coast, flood, energy

Burden index 0.36; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$14,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,030** statewide $117 · FY2026	New growth per resident **$17,910** FY2017–2025 · 216th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.6% of Saugus's general-fund spending in FY2025, up from 15.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **15.4%** $8.9M of $57.7M · median town 14.1%	FY2016 **12.7%** $9.6M of $75.8M · median town 12.2%	FY2025 **17.6%** $19.6M of $111M · median town 11.5%	Net of state charges, FY2025 **12.1%** FY2010: 10.6% · median town 10.0%

Saugus's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $909,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Saugus's state aid kept pace with both price measures: FY2025 aid was 42.5% above its FY2006 aid grown by Boston-area consumer prices and 26.6% above grown by the government price index.

Gross state aid went from $8.9 million in FY2006 to $19.6 million in FY2025, +120.9% in dollars. Flag: in FY2010, $555,000 of Saugus's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.9%** $11.4M to $17.1M · all towns +54.0%	All fixed costs, FY2016–25 **+37.0%** $18.8M to $25.7M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Saugus's health insurance would have been $14.2 million in FY2025; it was $17.1 million, $2.85 million above the path. Its fixed costs would have been $23.4 million in FY2025; it was $25.7 million, $2.27 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Saugus came to $1.1 million, 18.9% of the $5.69 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	18.9%	28.2%
Placed in the town	$1.1M	18.9%	42.3%
Everything placed	$1.1M	18.9%	45.2%

SCHOOLS

Saugus's required school contribution is 3.3% of median household income, 31st highest of 351.

Chapter 70 aid, FY2026 **$17.1M** to the town's district	Required local contribution **$36.6M** FY2026
Share of household income **3.3%** 31st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+101%** after inflation

Saugus runs its own school district and also belongs to Northeast Metropolitan; Saugus accounts for 8% of that district's foundation budget.

EXPECTED AND ACTUAL

Saugus received $4 million in earmarks placed in the town and competitive grants over ten years, 41% of the $9.8 million its size, need and institutions predict.

PEERS

Saugus ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Saugus this town	**29**	**$7,158**	**$98.00**	**$42.11**	**0.36**	**3.3%**
Dartmouth peer	29	$6,506	$296	$157	0.73	3.6%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Barnstable peer	26	$6,526	$289	$69.38	0.74	3.6%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Savoy

Town · Berkshire County · 795 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Berkshire · John Barrett, III

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Savoy Public Schools, the town's own district

Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Florida, Lanesborough, Monroe, North Adams and Williamstown

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Savoy scores 57 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

57 / 100

63rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	54	43	68

Rank under other weightings: 45th to 107th.

Weighting-dependent: the range crosses the 45–55 band

Savoy received more than its share of state aid on three of four measures; its blended score of 57 stays between 52 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

109th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
76	69	52	80

Rank under other weightings: 93rd to 129th.

Stable high: above 55 under every weighting

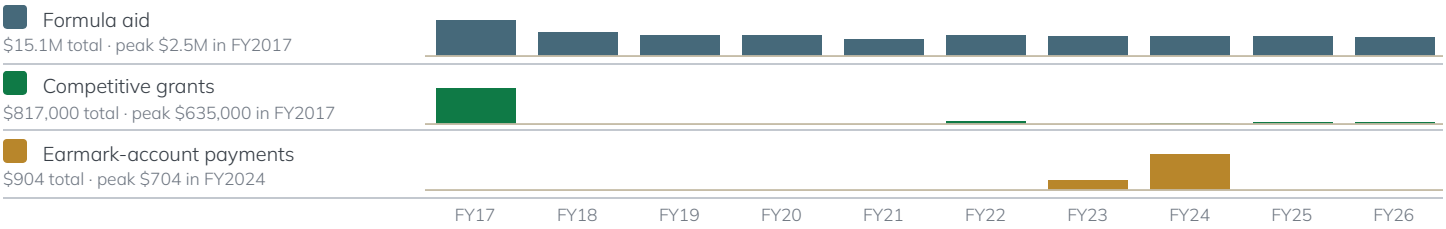
Savoy received more than its share of discretionary money on all four measures; its blended score of 69 stays between 64 and 74 under every weighting tested.

STATE MONEY, FY2017–FY2026

Savoy's town government and school districts received $15.1 million in formula aid and $817,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$15.1M	**$817,000**	**$904**
$18,956 per resident (35th of 351) · gross	$1,027 per resident (77th of 351)	$1.14 per resident (325th of 351)

Competitive grants to Savoy peaked in FY2017 at $635,000, 78% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 795 residents, a single payment moves Savoy's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $756,000, are not shown.

EARMARKS

No local earmark was placed in Savoy in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $904 in payments to Savoy's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Savoy.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Savoy's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Wendell	$90,000	$90,000	$90,000	$106
Charlemont	$165,000	$165,000	$165,000	$148
Granville	$0	$0	$0	$0
Colrain	$50,000	$50,000	$50,000	$30.73
New Salem	$106,000	$106,000	$106,000	$101

WHAT THE TOWN CARRIES

Measured against what it maintains, Savoy received 1.10 times its proportional share of competitive grant awards.

Local road miles **49.0** 258th of 351 · 61.7 per 1,000 residents (13th of 351)	Town-owned bridges, replacement cost **$13.1M** scored exposure $5.9M · three in poor condition	Road-stream crossings **116** 83rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **35.9 sq mi** 55% state-owned	Seasonal homes **10%** share of housing units	Peak service population **889** residents plus seasonal	Core infrastructure index **3.57** roads, culverts, dams, coast, flood, energy

Burden index 1.10; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **12,352 acres** 53.8% of land area · FY2026	State-owned land PILOT, FY2026 **$137,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$11.08** statewide $117 · FY2026	New growth per resident **$13,580** FY2017–2025 · 271st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 36.2% of Savoy's general-fund spending in FY2025, down from 44.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **44.2%** $699,000 of $1.6M · median town 14.1%	FY2016 **43.0%** $815,000 of $1.9M · median town 12.2%	FY2025 **36.2%** $952,000 of $2.6M · median town 11.5%	Net of state charges, FY2025 **32.8%** FY2010: 28.1% · median town 10.0%

Savoy's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $76,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Savoy's state aid did not keep pace with either price measure: FY2025 aid was 12.2% below its FY2006 aid grown by Boston-area consumer prices and 22.0% below grown by the government price index.

Gross state aid went from $699,000 in FY2006 to $952,000 in FY2025, +36.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+96.4%** $33,000 to $66,000 · all towns +54.0%	All fixed costs, FY2016–25 **+35.7%** $150,000 to $203,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 7** years it grew faster than allowed levy growth · two years not reported

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Savoy's health insurance would have been $42,000 in FY2025; it was $66,000, $24,000 above the path. Its fixed costs would have been $187,000 in FY2025; it was $203,000, $16,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (–32%) and FY2018 (+43%); health insurance changed by more than 30% in one year in FY2025 (+43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Savoy came to $0, 0.0% of the $32,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Savoy's required school contribution is 2.7% of median household income, 146th highest of 351.

Chapter 70 aid, FY2026 **$627,000** to the town's district	Required local contribution **$627,000** FY2026
Share of household income **2.7%** 146th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+43%** after inflation

Savoy runs its own school district and also belongs to Northern Berkshire; Savoy accounts for 3% of that district's foundation budget.

EXPECTED AND ACTUAL

Savoy received $1.4 million in earmarks placed in the town and competitive grants over ten years, 58% of the $2.4 million its size, need and institutions predict.

PEERS

Savoy is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Savoy this town	**57**	**$18,956**	**$1,027**	**$0**	**1.10**	**2.7%**
Wendell peer	65	$24,634	$5,863	$106	0.54	3.0%
Charlemont peer	64	$19,209	$6,110	$148	2.68	3.8%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
Colrain peer	59	$16,229	$3,795	$30.73	2.33	2.7%
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Scituate

Town · Plymouth County · 19,365 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Plymouth · Patrick Joseph Kearney

STATE SENATE

First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS

Scituate Public Schools, the town's own district

South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Hanson, Marshfield, Norwell, Rockland and Whitman

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Scituate scores 34 on the Fairness Index for all state aid and 72 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

274th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	50	28	26

Rank under other weightings: 256th to 287th.

Stable low: below 45 under every weighting

Scituate received less than its share of state aid on three of four measures; its blended score of 34 stays between 30 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

72 / 100

102nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	84	68	64

Rank under other weightings: 91st to 111th.

Stable high: above 55 under every weighting

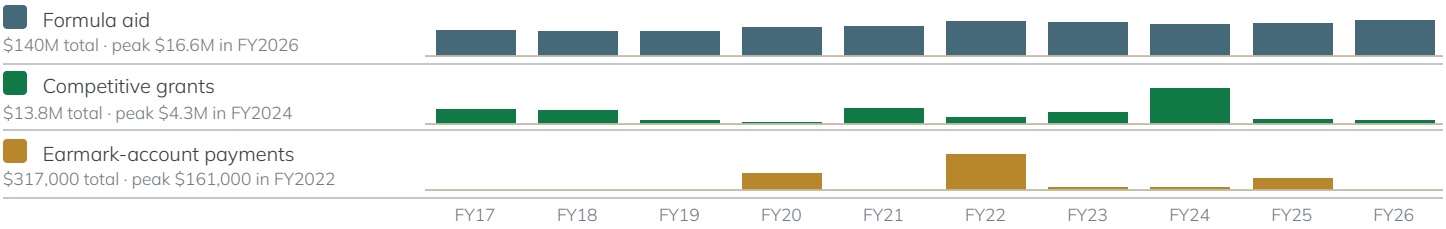
Scituate received more than its share of discretionary money on all four measures; its blended score of 72 stays between 68 and 75 under every weighting tested.

STATE MONEY, FY2017–FY2026

Scituate's town government and school districts received $140 million in formula aid and $13.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$140M	**$13.8M**	**$317,000**
$7,209 per resident (282nd of 351) · gross	$711 per resident (111th of 351)	$16.37 per resident (224th of 351)

Competitive grants to Scituate peaked in FY2024 at $4.3 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $17.9 million, are not shown.

EARMARKS

Scituate received $353,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$353,000	**$353,000**	**$353,000**	**Not a member**
$18.25 per resident (269th of 351)	$18.25 per resident (280th of 351)	$18.25 per resident (280th of 351)	35 municipalities had none

Placed in the town: 15 clauses in seven of ten budgets; the most recent in FY2026. Every one names Scituate directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"Scituate for the Cole parkway redevelopment project"	Enacted names the town
FY2024	$50,000	"the Scituate Housing Authority for housing improvements in the town of Scituate"	Enacted names the town
FY2022	$50,000	"South Shore Peer Recovery, Inc. in the town of Scituate to support operations and programming"	Enacted names the town
FY2018	$35,000	"construction of a pedestrian walkway with appropriate safety signage and signalization at intersection of state highway route 3A and the new Gates…"	Enacted names the town
FY2025	$25,000	"the Friends of Scituate FACTS, Inc. in the town of Scituate"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Scituate received 3.23 times its proportional share of competitive grant awards.

Local road miles **102.8** 87th of 351 · 5.3 per 1,000 residents (218th of 351)	Town-owned bridges, replacement cost **$16.6M** scored exposure $2.8M · none in poor condition	Road-stream crossings **48** 270th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **17.2 sq mi** 1% state-owned	Seasonal homes **5%** share of housing units	Peak service population **20,493** residents plus seasonal	Core infrastructure index **3.60** roads, culverts, dams, coast, flood, energy

Burden index 3.23; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **5 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$138** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$27.60** statewide $117 · FY2026	New growth per resident **$44,879** FY2017–2025 · 46th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.5% of Scituate's general-fund spending in FY2025, down from 14.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.4%** $6.4M of $44.5M · median town 14.1%	FY2016 **10.2%** $7.2M of $70.8M · median town 12.2%	FY2025 **9.5%** $9.6M of $101M · median town 11.5%	Net of state charges, FY2025 **8.7%** FY2010: 12.1% · median town 10.0%

Scituate's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $198,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Scituate's state aid did not keep pace with either price measure: FY2025 aid was 3.4% below its FY2006 aid grown by Boston-area consumer prices and 14.1% below grown by the government price index.

Gross state aid went from $6.4 million in FY2006 to $9.6 million in FY2025, +49.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+53.2%** $4.8M to $7.4M · all towns +54.0%	All fixed costs, FY2016–25 **+63.7%** $10.5M to $17.1M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Scituate's health insurance would have been $6.01 million in FY2025; it was $7.37 million, $1.36 million above the path. Its fixed costs would have been $13.1 million in FY2025; it was $17.1 million, $4.06 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Scituate came to $343,000, 13.4% of the $2.56 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$343,000	13.4%	28.2%
Placed in the town	$343,000	13.4%	42.3%
Everything placed	$343,000	13.4%	45.2%

SCHOOLS

Scituate's required school contribution is 2.9% of median household income, 102nd highest of 351.

Chapter 70 aid, FY2026 **$7.5M** to the town's district	Required local contribution **$30.5M** FY2026
Share of household income **2.9%** 102nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+9%** after inflation

Scituate runs its own school district and also belongs to South Shore; Scituate accounts for 9% of that district's foundation budget.

EXPECTED AND ACTUAL

Scituate received $14.1 million in earmarks placed in the town and competitive grants over ten years, 38% more than the $10.2 million its size, need and institutions predict.

PEERS

Scituate ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Scituate this town	**34**	**$7,209**	**$711**	**$18.25**	**3.23**	**2.9%**
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Seekonk

Town · Bristol County · 15,694 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
4th Bristol · Steven S. Howitt

STATE SENATE
Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS
Seekonk Public Schools, the town's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, North Attleborough, Plainville, Sherborn and two others

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Seekonk scores 31 on the Fairness Index for all state aid and 6 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100

299th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	36	29	28

Rank under other weightings: 288th to 307th.

Stable low: below 45 under every weighting

Seekonk received less than its share of state aid on all four measures; its blended score of 31 stays between 29 and 32 under every weighting tested.

DISCRETIONARY MONEY ONLY

6 / 100

351st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
6	8	7	5

Rank 351st under every weighting tested.

Stable low: below 45 under every weighting

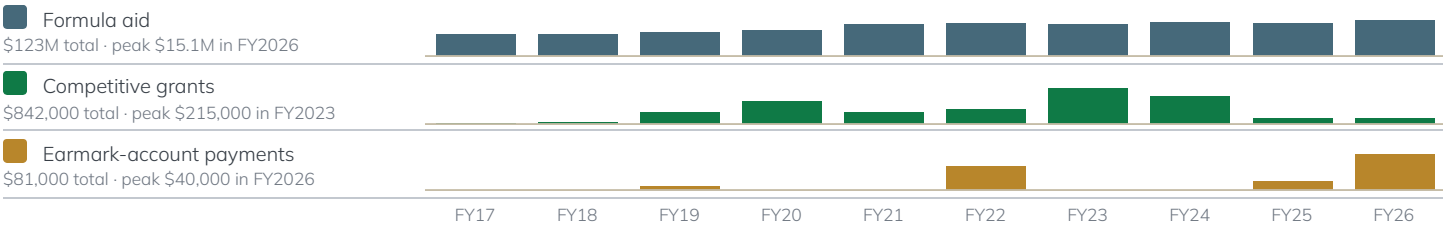
Seekonk received less than its share of discretionary money on all four measures; its blended score of 6 stays between 6 and 7 under every weighting tested.

STATE MONEY, FY2017–FY2026

Seekonk's town government and school districts received $123 million in formula aid and $842,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$123M	**$842,000**	**$81,000**
$7,825 per resident (262nd of 351) · gross	$53.68 per resident (346th of 351)	$5.18 per resident (284th of 351)

Competitive grants to Seekonk peaked in FY2023 at $215,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $20 million, are not shown.

EARMARKS

Seekonk received $267,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$267,000	**$267,000**	**$267,000**	**Not a member**
$16.99 per resident (275th of 351)	$16.99 per resident (285th of 351)	$16.99 per resident (285th of 351)	35 municipalities had none

Placed in the town: ten clauses in nine of ten budgets; the most recent in FY2026. Every one names Seekonk directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$50,000	"the town of Seekonk for the removal of the Maple avenue dam"	Enacted names the town
FY2018	$50,000	"the Seekonk Senior Center"	Enacted names the town
FY2024	$35,000	"the removal of the Maple avenue dam in the town of Seekonk"	Enacted names the town
FY2026	$25,000	"necessary HVAC replacements to the public safety building in the town of Seekonk"	Enacted names the town
FY2022	$25,000	"the town of Seekonk for funding to assess the structural concerns at the Burr's pond dam in the Burrs pond conservation area"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Seekonk received 1.67 times its proportional share of competitive grant awards.

Local road miles **101.9** 91st of 351 · 6.5 per 1,000 residents (176th of 351)	Town-owned bridges, replacement cost **$1.8M** scored exposure $633,000 · none in poor condition	Road-stream crossings **95** 128th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **18.4 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,694** residents plus seasonal	Core infrastructure index **0.21** roads, culverts, dams, coast, flood, energy

Burden index 1.67; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$22,549** FY2017–2025 · 157th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.7% of Seekonk's general-fund spending in FY2025, down from 19.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **19.7%** $6.7M of $34.2M · median town 14.1%	FY2016 **13.7%** $6.4M of $46.6M · median town 12.2%	FY2025 **13.7%** $9.6M of $70.5M · median town 11.5%	Net of state charges, FY2025 **12.6%** FY2010: 17.4% · median town 10.0%

Seekonk's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $629,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Seekonk's state aid did not keep pace with either price measure: FY2025 aid was 7.7% below its FY2006 aid grown by Boston-area consumer prices and 17.9% below grown by the government price index.

Gross state aid went from $6.7 million in FY2006 to $9.6 million in FY2025, +43.2% in dollars. Flag: in FY2010, $1.4 million of Seekonk's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+50.0%** $4.9M to $7.3M · all towns +54.0%	All fixed costs, FY2016–25 **+64.6%** $7.9M to $13.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Seekonk's health insurance would have been $6.08 million in FY2025; it was $7.30 million, $1.22 million above the path. Its fixed costs would have been $9.92 million in FY2025; it was $13.1 million, $3.15 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Seekonk came to $227,000, 9.3% of the $2.43 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$227,000	9.3%	28.2%
Placed in the town	$227,000	9.3%	42.3%
Everything placed	$227,000	9.3%	45.2%

SCHOOLS

Seekonk's required school contribution is 3.0% of median household income, 64th highest of 351.

Chapter 70 aid, FY2026 **$8.9M** to the town's district	Required local contribution **$21.9M** FY2026
Share of household income **3.0%** 64th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+12%** after inflation

Seekonk runs its own school district and also belongs to Tri County and Bristol County; Seekonk accounts for 8% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Seekonk received $1.2 million in earmarks placed in the town and competitive grants over ten years, 22% of the $5.7 million its size, need and institutions predict.

PEERS

Seekonk ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Seekonk this town	**31**	**$7,825**	**$53.68**	**$16.99**	**1.67**	**3.0%**
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Easton peer	30	$7,249	$236	$53.96	1.08	3.3%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Uxbridge lowest in class of 30	48	$11,199	$436	$15.55	1.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Sharon

Town · Norfolk County · 18,574 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Norfolk · Edward R. Philips

STATE SENATE

Bristol and Norfolk · Paul R. Feeney

SCHOOL DISTRICTS

Sharon Public Schools, the town's own district

Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Foxborough, Mansfield, Norton, Stoughton and West Bridgewater

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Sharon scores 35 on the Fairness Index for all state aid and 67 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

264th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	53	26	25

Rank under other weightings: 230th to 292nd.

Stable low: below 45 under every weighting

Sharon received less than its share of state aid on three of four measures; its blended score of 35 stays between 29 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

67 / 100

120th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	79	71	52

Rank under other weightings: 102nd to 135th.

Stable high: above 55 under every weighting

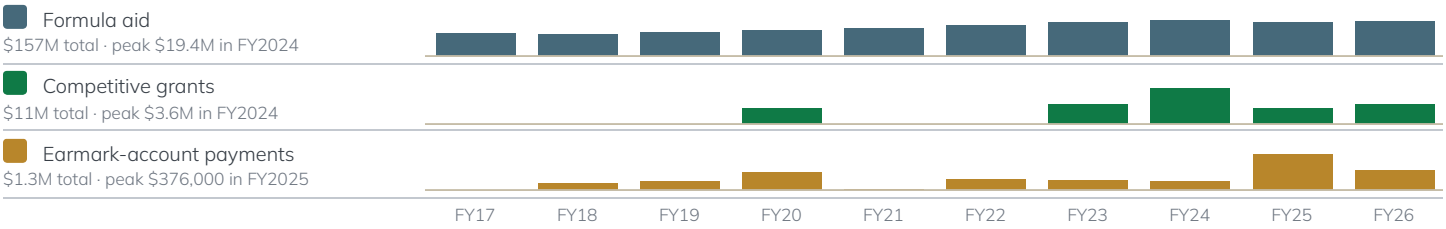
Sharon received more than its share of discretionary money on all four measures; its blended score of 67 stays between 62 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sharon's town government and school districts received $157 million in formula aid and $11 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$157M	**$11M**	**$1.3M**
$8,474 per resident (235th of 351) · gross	$593 per resident (124th of 351)	$68.25 per resident (41st of 351)

Competitive grants to Sharon peaked in FY2024 at $3.6 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.7 million, are not shown.

EARMARKS

Sharon received $714,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$714,000	**$714,000**	**$714,000**	**Not a member**
$38.45 per resident (197th of 351)	$38.45 per resident (210th of 351)	$38.45 per resident (213th of 351)	35 municipalities had none

Placed in the town: 18 clauses in nine of ten budgets; the most recent in FY2026. Every one names Sharon directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"body worn cameras for the Sharon police department"	Enacted names the town
FY2025	$100,000	"the survey, analysis, and design plans for drainage improvements on Robin road in Sharon"	Enacted names the town
FY2020	$60,000	"a feasibility study for the reuse of the historic Sharon public library building in the town of Sharon"	Enacted names the town
FY2019	$60,000	"the Ezra Schwartz Memorial Pavilion at the Ames Street playground in the town of Sharon"	Enacted names the town
FY2023	$50,000	"polyfluoroalkyl substances remediation costs in the town of Sharon"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sharon received 1.92 times its proportional share of competitive grant awards.

Local road miles **108.3** 76th of 351 · 5.8 per 1,000 residents (200th of 351)	Town-owned bridges, replacement cost **$1M** scored exposure $91,000 · none in poor condition	Road-stream crossings **127** 69th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **23.4 sq mi** 7% state-owned	Seasonal homes **0%** share of housing units	Peak service population **18,635** residents plus seasonal	Core infrastructure index **0.41** roads, culverts, dams, coast, flood, energy

Burden index 1.92; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,171 acres** 7.8% of land area · FY2026	State-owned land PILOT, FY2026 **$268,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$229** statewide $117 · FY2026	New growth per resident **$15,308** FY2017–2025 · 248th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.2% of Sharon's general-fund spending in FY2025, down from 13.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.8%** $9.6M of $69.3M · median town 14.1%	FY2016 **11.6%** $10.4M of $89.8M · median town 12.2%	FY2025 **12.2%** $13M of $107M · median town 11.5%	Net of state charges, FY2025 **11.1%** FY2010: 14.0% · median town 10.0%

Sharon's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $156,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sharon's state aid did not keep pace with either price measure: FY2025 aid was 12.4% below its FY2006 aid grown by Boston-area consumer prices and 22.1% below grown by the government price index.

Gross state aid went from $9.6 million in FY2006 to $13 million in FY2025, +35.9% in dollars. Flag: in FY2010, $2 million of Sharon's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–19.5%** $20.1M to $16.2M · all towns +54.0%	All fixed costs, FY2016–25 **–23.4%** $24.6M to $18.9M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sharon's health insurance would have been $25.1 million in FY2025; it was $16.2 million, $8.93 million below the path. Its fixed costs would have been $30.7 million in FY2025; it was $18.9 million, $11.9 million below the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (–32%); health insurance changed by more than 30% in one year in FY2017 (–43%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Sharon's reported health insurance fell from $20.1 million in FY2016 to $16.2 million in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$599,000	no increase	28.2%
Placed in the town	$599,000	no increase	42.3%
Everything placed	$599,000	no increase	45.2%

SCHOOLS

Sharon's required school contribution is 3.1% of median household income, 61st highest of 351.

Chapter 70 aid, FY2026 **$11.5M** to the town's district	Required local contribution **$37.5M** FY2026
Share of household income **3.1%** 61st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

Sharon runs its own school district and also belongs to Norfolk County and Southeastern; Sharon accounts for 4% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Sharon received $12.7 million in earmarks placed in the town and competitive grants over ten years, 2.0 times the $6.2 million its size, need and institutions predict.

PEERS

Sharon ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sharon this town	**35**	**$8,474**	**$593**	**$38.45**	**1.92**	**3.1%**
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Acton peer	40	$9,929	$351	$51.13	2.12	3.1%
Reading peer	35	$8,102	$118	$31.24	1.27	2.6%
Walpole peer	30	$6,864	$139	$32.09	0.61	2.6%
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Sheffield

Town · Berkshire County · 3,330 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Berkshire · Leigh Davis

The author was a candidate for this seat in 2024.

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Southern Berkshire Regional School District, shared with Alford, Egremont, Monterey and New Marlborough

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Sheffield scores 47 on the Fairness Index for all state aid and 92 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

146th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	48	48	46

Rank under other weightings: 136th to 151st.

Near fair: between 45 and 55 under every weighting

Sheffield received less than its share of state aid on all four measures; its blended score of 47 stays between 47 and 48 under every weighting tested.

DISCRETIONARY MONEY ONLY

92 / 100

34th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	94	89	93

Rank under other weightings: 32nd to 35th.

Stable high: above 55 under every weighting

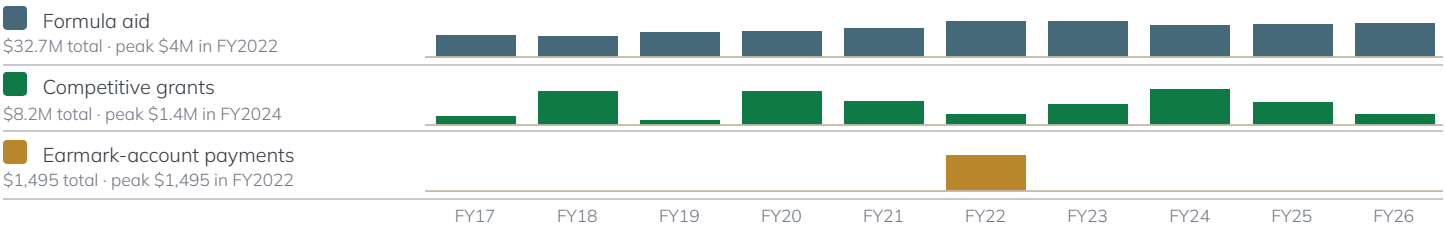
Sheffield received more than its share of discretionary money on all four measures; its blended score of 92 stays between 92 and 93 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sheffield's town government and school districts received $32.7 million in formula aid and $8.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$32.7M	**$8.2M**	**$1,495**
$9,816 per resident (184th of 351) · gross	$2,468 per resident (39th of 351)	$0.45 per resident (331st of 351)

Competitive grants to Sheffield were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.7 million, are not shown.

EARMARKS

No local earmark was placed in Sheffield in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $1,495 in payments to Sheffield's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Sheffield.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Sheffield's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Hatfield	$10,000	$10,000	$10,000	$3.01
Northfield	$10,000	$10,000	$10,000	$3.48
Plympton	$335,000	$335,000	$335,000	$114
Lee	$125,000	$125,000	$125,000	$21.86
Leverett	$215,000	$215,000	$215,000	$134

WHAT THE TOWN CARRIES

Measured against what it maintains, Sheffield received 1.94 times its proportional share of competitive grant awards.

Local road miles **81.2** 151st of 351 · 24.4 per 1,000 residents (49th of 351)	Town-owned bridges, replacement cost **$34.1M** scored exposure $12M · five in poor condition	Road-stream crossings **91** 138th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **47.4 sq mi** 7% state-owned	Seasonal homes **10%** share of housing units	Peak service population **3,728** residents plus seasonal	Core infrastructure index **1.10** roads, culverts, dams, coast, flood, energy

Burden index 1.94; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,182 acres** 7.2% of land area · FY2026	State-owned land PILOT, FY2026 **$187,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$85.56** statewide $117 · FY2026	New growth per resident **$26,630** FY2017–2025 · 130th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.4% of Sheffield's general-fund spending in FY2025, up from 4.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.1%** $290,000 of $7.1M · median town 14.1%	FY2016 **4.0%** $374,000 of $9.4M · median town 12.2%	FY2025 **4.4%** $566,000 of $12.9M · median town 11.5%	Net of state charges, FY2025 **4.1%** FY2010: 3.1% · median town 10.0%

Sheffield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sheffield's state aid kept pace with both price measures: FY2025 aid was 26.0% above its FY2006 aid grown by Boston-area consumer prices and 12.0% above grown by the government price index.

Gross state aid went from $290,000 in FY2006 to $566,000 in FY2025, +95.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–3.4%** $389,000 to $376,000 · all towns +54.0%	All fixed costs, FY2016–25 **+36.1%** $624,000 to $848,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sheffield's health insurance would have been $486,000 in FY2025; it was $376,000, $110,000 below the path. Its fixed costs would have been $779,000 in FY2025; it was $848,000, $70,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Sheffield's reported health insurance fell from $389,000 in FY2016 to $376,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	no increase	28.2%
Placed in the town	$0	no increase	42.3%
Everything placed	$0	no increase	45.2%

SCHOOLS

Sheffield's required school contribution is 3.3% of median household income, 26th highest of 351.

Chapter 70 aid, FY2026 **$1.2M** attributed to the town	Required local contribution **$4.1M** FY2026
Share of household income **3.3%** 26th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–5%** after inflation

Sheffield has no school district of its own. Its pupils attend Sheffield and Southern Berkshire; Sheffield accounts for 100% and 51% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Sheffield received $10.4 million in earmarks placed in the town and competitive grants over ten years, 94% more than the $5.3 million its size, need and institutions predict.

PEERS

Sheffield is one of two municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sheffield this town	**47**	**$9,816**	**$2,468**	**$0**	**1.94**	**3.3%**
Hatfield peer	31	$6,480	$1,299	$3.01	1.78	2.5%
Northfield peer	52	$12,644	$1,336	$3.48	1.74	2.7%
Plympton peer	35	$9,237	$274	$114	0.71	3.4%
Lee peer	38	$7,783	$1,292	$21.86	2.91	3.1%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Becket lowest in class of 30	50	$9,450	$3,826	$0	2.09	3.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Shelburne

Town · Franklin County · 1,567 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mohawk Trail Regional School District, shared with Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath and Plainfield

Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Shelburne scores 66 on the Fairness Index for all state aid and 98 for discretionary money. Fifty is a fair share.

ALL STATE AID

66 / 100

21st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
68	63	69	62

Rank under other weightings: 15th to 29th.

Stable high: above 55 under every weighting

Shelburne received more than its share of state aid on all four measures; its blended score of 65 stays between 64 and 67 under every weighting tested.

DISCRETIONARY MONEY ONLY

98 / 100

2nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
99	99	98	99

Rank under other weightings: 2nd to 3rd.

Stable high: above 55 under every weighting

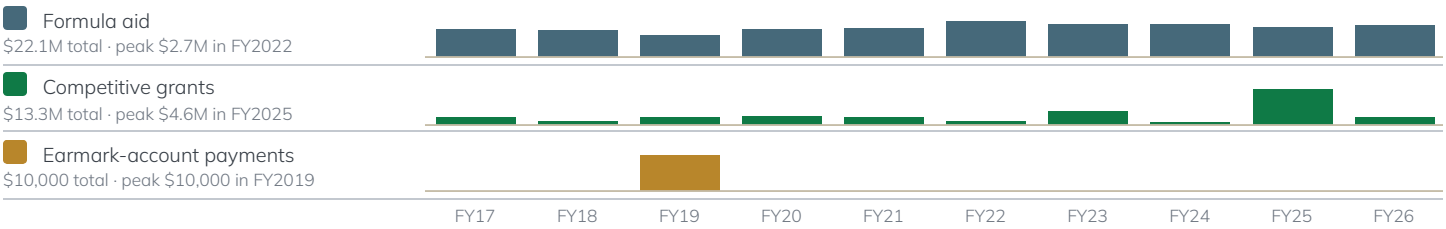
Shelburne received more than its share of discretionary money on all four measures; its blended score of 98 stays between 98 and 99 under every weighting tested.

STATE MONEY, FY2017–FY2026

Shelburne's town government and school districts received $22.1 million in formula aid and $13.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$22.1M	$13.3M	$10,000
$14,126 per resident (91st of 351) · gross	$8,461 per resident (5th of 351)	$6.38 per resident (277th of 351)

Competitive grants to Shelburne peaked in FY2025 at $4.6 million, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.9 million, are not shown.

EARMARKS

Shelburne received $185,000 in local earmarks naming the town, $285,000 placed in the town and $285,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$185,000	$285,000	$285,000	Not a member
$118 per resident (28th of 351)	$182 per resident (12th of 351)	$182 per resident (21st of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. $185,000 came in clauses that name Shelburne; the other $100,000 went to organizations based in Shelburne, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$100,000	"not less than $100,000 shall be directed to the Greater Shelburne Falls Area Business Association, Inc. for economic development including, but not…"	Enacted names the town
FY2026	$75,000	"the town of Shelburne for playground improvements"	Enacted names the town
FY2026	$25,000	"the Mary Lyon Foundation for services and financial support to students and families in Franklin county"	Enacted recipient based here
FY2025	$25,000	"the Mary Lyon Foundation, Inc. for services and financial support to students and families in Franklin county"	Enacted recipient based here
FY2024	$25,000	"the Mary Lyon Foundation, Inc. for services and supports to students and families in western Franklin county"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Shelburne received 2.94 times its proportional share of competitive grant awards.

Local road miles **48.9** 259th of 351 · 31.2 per 1,000 residents (40th of 351)	Town-owned bridges, replacement cost **$12.4M** scored exposure $4.7M · 5.5 in poor condition	Road-stream crossings **70** 196th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **23.2 sq mi** 1% state-owned	Seasonal homes **4%** share of housing units	Peak service population **1,637** residents plus seasonal	Core infrastructure index **2.76** roads, culverts, dams, coast, flood, energy

Burden index 2.94; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **75 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$4,129** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$55.27** statewide $117 · FY2026	New growth per resident **$31,030** FY2017–2025 · 99th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.3% of Shelburne's general-fund spending in FY2025, down from 9.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.1%** $275,000 of $3M · median town 14.1%	FY2016 **7.0%** $267,000 of $3.8M · median town 12.2%	FY2025 **5.3%** $341,000 of $6.5M · median town 11.5%	Net of state charges, FY2025 **5.0%** FY2010: 7.2% · median town 10.0%

Shelburne's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $899,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Shelburne's state aid did not keep pace with either price measure: FY2025 aid was 20.0% below its FY2006 aid grown by Boston-area consumer prices and 28.9% below grown by the government price index.

Gross state aid went from $275,000 in FY2006 to $341,000 in FY2025, +24.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.7%** $137,000 to $216,000 · all towns +54.0%	All fixed costs, FY2016–25 **+65.8%** $254,000 to $421,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Shelburne's health insurance would have been $171,000 in FY2025; it was $216,000, $45,000 above the path. Its fixed costs would have been $317,000 in FY2025; it was $421,000, $104,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+36%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Shelburne came to $110,000, 139.1% of the $79,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$110,000	139.1%	28.2%
Placed in the town	$185,000	2.3 times	42.3%
Everything placed	$185,000	2.3 times	45.2%

SCHOOLS

Shelburne's required school contribution is 3.0% of median household income, 78th highest of 351.

Chapter 70 aid, FY2026 **$884,000** attributed to the town	Required local contribution **$1.9M** FY2026
Share of household income **3.0%** 78th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–25%** after inflation

Shelburne has no school district of its own. Its pupils attend Mohawk Trail and Franklin County; Shelburne accounts for 18% and 2% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Shelburne received $15.1 million in earmarks placed in the town and competitive grants over ten years, 82% more than the $8.3 million its size, need and institutions predict.

PEERS

Shelburne ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Shelburne this town	**66**	**$14,126**	**$8,461**	**$182**	**2.94**	**3.0%**
Royalston peer	59	$15,842	$2,316	$41.10	0.96	1.5%
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
Ashfield peer	45	$10,211	$1,970	$48.86	1.85	2.4%
Goshen peer	58	$15,373	$3,510	$81.97	1.88	2.3%
Granville peer · lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Sherborn

Town · Middlesex County · 4,427 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Middlesex · James C. Arena-DeRosa

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Sherborn Public Schools, the town's own district
Dover-Sherborn Regional School District, shared with Dover
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, North Attleborough, Plainville, Seekonk and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Sherborn scores 39 on the Fairness Index for all state aid and 73 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

223rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	64	26	27

Rank under other weightings: 154th to 268th.

Weighting-dependent: the range crosses the 45–55 band

Sherborn received less than its share of state aid on three of four measures; its blended score of 39 stays between 32 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

73 / 100

96th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
73	87	72	59

Rank under other weightings: 82nd to 112th.

Stable high: above 55 under every weighting

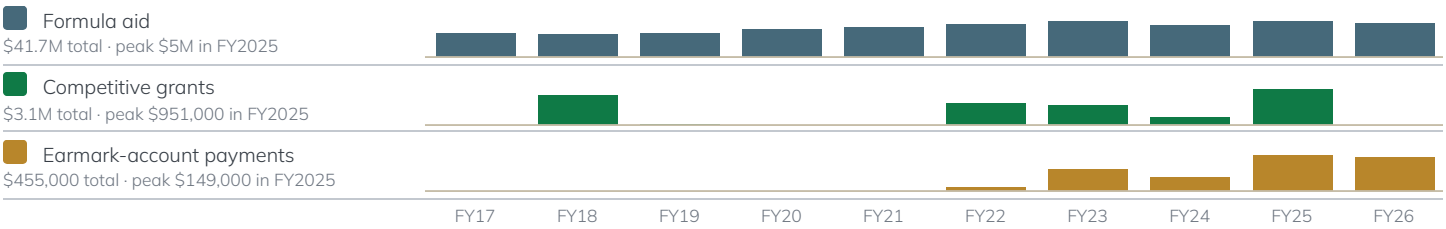
Sherborn received more than its share of discretionary money on all four measures; its blended score of 73 stays between 68 and 77 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sherborn's town government and school districts received $41.7 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$41.7M	**$3.1M**	**$455,000**
$9,422 per resident (198th of 351) · gross	$708 per resident (112th of 351)	$103 per resident (20th of 351)

Competitive grants to Sherborn peaked in FY2025 at $951,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.3 million, are not shown.

EARMARKS

Sherborn received $481,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$481,000	**$481,000**	**$481,000**	**Not a member**
$109 per resident (38th of 351)	$109 per resident (59th of 351)	$109 per resident (65th of 351)	35 municipalities had none

Placed in the town: 13 clauses in seven of ten budgets; the most recent in FY2026. Every one names Sherborn directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$100,000	"the Woodhaven Elderly Housing Complex in the town of Sherborn for replacement windows"	Enacted names the town
FY2025	$50,000	"water quality and infrastructure improvements in the town of Sherborn"	Enacted names the town
FY2023	$50,000	"a watershed-based plan for Farm pond in the town of Sherborn"	Enacted names the town
FY2020	$50,000	"exterior safety improvements to the town hall campus in the town of Sherborn"	Enacted names the town
FY2018	$50,000	"the Commonwealth Housing Development in Brighton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sherborn received 88% of its proportional share of competitive grant awards.

Local road miles **55.9** 227th of 351 · 12.6 per 1,000 residents (81st of 351)	Town-owned bridges, replacement cost **$2.5M** scored exposure $283,000 · none in poor condition	Road-stream crossings **63** 219th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.8 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,427** residents plus seasonal	Core infrastructure index **1.81** roads, culverts, dams, coast, flood, energy

Burden index 0.88; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **30 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$22,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$744** statewide $117 · FY2026	New growth per resident **$29,437** FY2017–2025 · 109th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.5% of Sherborn's general-fund spending in FY2025, down from 4.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.9%** $909,000 of $18.7M · median town 14.1%	FY2016 **4.3%** $1.1M of $25.1M · median town 12.2%	FY2025 **3.5%** $1.2M of $33.9M · median town 11.5%	Net of state charges, FY2025 **3.2%** FY2010: 4.5% · median town 10.0%

Sherborn's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sherborn's state aid did not keep pace with either price measure: FY2025 aid was 15.5% below its FY2006 aid grown by Boston-area consumer prices and 24.9% below grown by the government price index.

Gross state aid went from $909,000 in FY2006 to $1.2 million in FY2025, +31.0% in dollars. Flag: in FY2010, $294,000 of Sherborn's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+17.4%** $1.3M to $1.6M · all towns +54.0%	All fixed costs, FY2016–25 **+42.9%** $2.3M to $3.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sherborn's health insurance would have been $1.67 million in FY2025; it was $1.57 million, $100,000 below the path. Its fixed costs would have been $2.93 million in FY2025; it was $3.35 million, $423,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sherborn came to $436,000, 187.2% of the $233,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$436,000	187.2%	28.2%
Placed in the town	$436,000	187.2%	42.3%
Everything placed	$436,000	187.2%	45.2%

SCHOOLS

Sherborn's required school contribution is 2.7% of median household income, 169th highest of 351.

Chapter 70 aid, FY2026 **$2.4M** to the town's district	Required local contribution **$10.2M** FY2026
Share of household income **2.7%** 169th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+22%** after inflation

Sherborn runs its own district for some grades and belongs to Dover-Sherborn and Tri County for others; Sherborn accounts for 47% and 1% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Sherborn received $3.6 million in earmarks placed in the town and competitive grants over ten years, 54% more than the $2.4 million its size, need and institutions predict.

PEERS

Sherborn ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sherborn this town	**39**	**$9,422**	**$708**	**$109**	**0.88**	**2.7%**
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
West Newbury peer	48	$10,655	$574	$38.12	0.91	2.1%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Newbury peer	41	$8,033	$339	$38.77	0.19	1.6%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Shirley

Town · Middlesex County · 6,976 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

37th Middlesex · Danillo A. Sena

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

Ayer Shirley School District, shared with Ayer

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Groton, Littleton, Pepperell, Townsend and Westford

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Shirley scores 48 on the Fairness Index for all state aid and 61 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

137th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	43	52	51

Rank under other weightings: 111th to 160th.

Near fair: between 45 and 55 under every weighting

Shirley received less than its share of state aid on two of four measures; its blended score of 48 stays between 47 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

61 / 100

137th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	56	62	64

Rank under other weightings: 130th to 146th.

Stable high: above 55 under every weighting

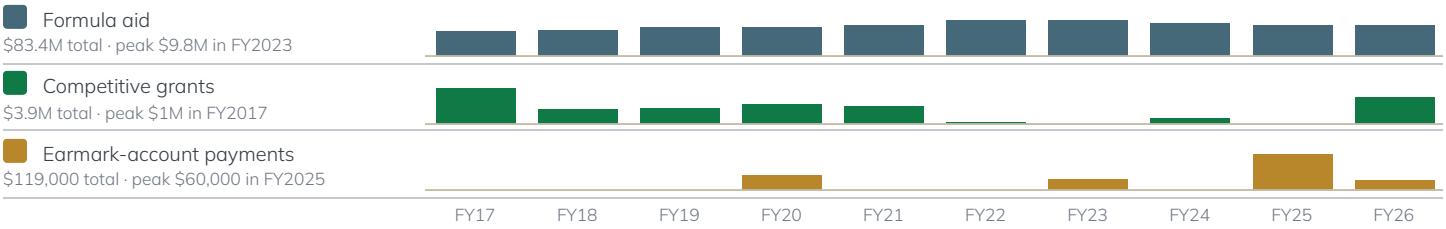
Shirley received more than its share of discretionary money on all four measures; its blended score of 61 stays between 60 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Shirley's town government and school districts received $83.4 million in formula aid and $3.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$83.4M	$3.9M	$119,000
$11,957 per resident (129th of 351) · gross	$554 per resident (130th of 351)	$17.04 per resident (219th of 351)

Competitive grants to Shirley peaked in FY2017 at $1 million, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.3 million, are not shown.

EARMARKS

Shirley received $166,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$166,000	$166,000	$166,000	Not a member
$23.80 per resident (253rd of 351)	$23.80 per resident (262nd of 351)	$23.80 per resident (263rd of 351)	35 municipalities had none

Placed in the town: six clauses in four of ten budgets; the most recent in FY2026. Every one names Shirley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$50,000	"the design and engineering of an elevator in the War Memorial building in the town of Shirley in compliance with the Americans with Disabilities Act"	Enacted names the town
FY2025	$35,000	"the town of Shirley to conduct an engineering study to determine the compliance of the Fredonian park pond walkway with the Americans with..."	Enacted names the town
FY2025	$25,000	"Shirley to provide reduced-cost or no-cost summer camp for children through the summer in Shirley program"	Enacted names the town
FY2023	$25,000	"the town of Shirley to upgrade handicapped accessibility to the Shirley war memorial building"	Enacted names the town
FY2026	$16,000	"the police department in the town of Shirley for the purchase of a drone and supportive equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Shirley received 74% of its proportional share of competitive grant awards.

Local road miles **43.3** 275th of 351 · 6.2 per 1,000 residents (184th of 351)	Town-owned bridges, replacement cost **$11.4M** scored exposure $3.7M · none in poor condition	Road-stream crossings **49** 266th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.8 sq mi** 12% state-owned	Seasonal homes **2%** share of housing units	Peak service population **7,090** residents plus seasonal	Core infrastructure index **1.20** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,409 acres** 13.9% of land area · FY2026	State-owned land PILOT, FY2026 **$170,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$121** statewide $117 · FY2026	New growth per resident **$11,314** FY2017–2025 · 303rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

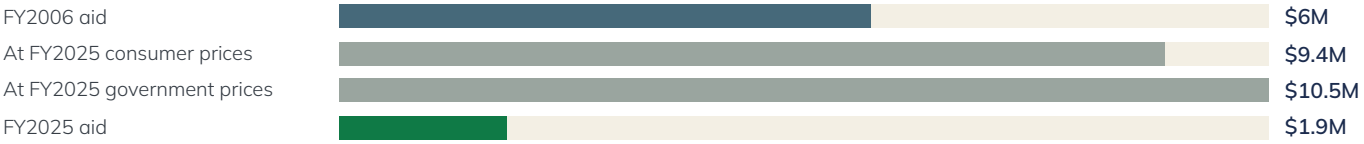
State aid covered 10.8% of Shirley's general-fund spending in FY2025, down from 44.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **44.3%** $6M of $13.6M · median town 14.1%	FY2016 **10.5%** $1.4M of $13.3M · median town 12.2%	FY2025 **10.8%** $1.9M of $17.7M · median town 11.5%	Net of state charges, FY2025 **10.4%** FY2010: 33.5% · median town 10.0%

Shirley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $4.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Shirley's state aid did not keep pace with either price measure: FY2025 aid was 79.6% below its FY2006 aid grown by Boston-area consumer prices and 81.9% below grown by the government price index.



Gross state aid went from $6 million in FY2006 to $1.9 million in FY2025, –68.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–60.0%** $541,000 to $217,000 · all towns +54.0%	All fixed costs, FY2016–25 **+39.7%** $1.4M to $2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Shirley's health insurance would have been $676,000 in FY2025; it was $217,000, $459,000 below the path. Its fixed costs would have been $1.80 million in FY2025; it was $2.01 million, $213,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (–73%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Shirley's reported health insurance fell from $541,000 in FY2016 to $217,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$135,000	no increase	28.2%
Placed in the town	$135,000	no increase	42.3%
Everything placed	$135,000	no increase	45.2%

SCHOOLS

Shirley's required school contribution is 2.5% of median household income, 227th highest of 351.

Chapter 70 aid, FY2026 **$4.7M** attributed to the town	Required local contribution **$6.9M** FY2026
Share of household income **2.5%** 227th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–12%** after inflation

Shirley has no school district of its own. Its pupils attend Ayer Shirley and Nashoba Valley; Shirley accounts for 41% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Shirley received $4 million in earmarks placed in the town and competitive grants over ten years, 8% more than the $3.7 million its size, need and institutions predict.

PEERS

Shirley ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Shirley this town	**48**	**$11,957**	**$554**	**$23.80**	**0.74**	**2.5%**
Townsend peer	54	$15,988	$300	$29.35	0.75	2.3%
Williamstown peer	21	$5,059	$141	$20.49	1.38	2.4%
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Shrewsbury

Town · Worcester County · 38,876 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
11th Worcester · Hannah Kane

STATE SENATE
Second Worcester · Michael O. Moore

SCHOOL DISTRICTS
Shrewsbury Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Shrewsbury scores 36 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

254th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	44	29	36

Rank under other weightings: 242nd to 272nd.

Stable low: below 45 under every weighting

Shrewsbury received less than its share of state aid on all four measures; its blended score of 36 stays between 33 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100

296th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	29	26	22

Rank under other weightings: 285th to 301st.

Stable low: below 45 under every weighting

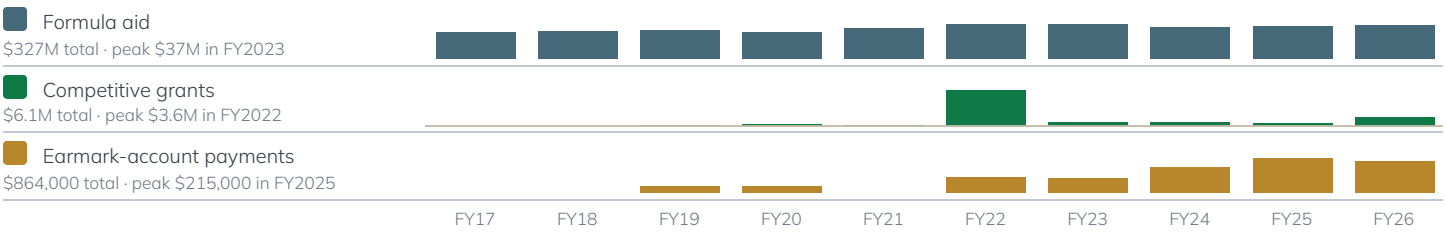
Shrewsbury received less than its share of discretionary money on all four measures; its blended score of 24 stays between 23 and 26 under every weighting tested.

STATE MONEY, FY2017–FY2026

Shrewsbury's town government and school districts received $327 million in formula aid and $6.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$327M	**$6.1M**	**$864,000**
$8,418 per resident (238th of 351) · gross	$158 per resident (279th of 351)	$22.21 per resident (191st of 351)

Competitive grants to Shrewsbury peaked in FY2022 at $3.6 million, 59% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19 million, are not shown.

EARMARKS

Shrewsbury received $988,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$988,000	**$988,000**	**$988,000**	**Not a member**
$25.41 per resident (247th of 351)	$25.41 per resident (258th of 351)	$25.41 per resident (259th of 351)	35 municipalities had none

Placed in the town: 25 clauses in ten of ten budgets; the most recent in FY2026. Every one names Shrewsbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$75,000	"Shrewsbury Youth and Family Services in the town of Shrewsbury to provide mental health services in the commonwealth"	Enacted names the town
FY2024	$75,000	"Shrewsbury Youth and Family Services, Inc. for mental health services in the commonwealth"	Enacted names the town
FY2023	$69,000	"the town of Shrewsbury for the purchase of new voting machines"	Enacted names the town
FY2026	$50,000	"the town of Shrewsbury to support Shrewsbury's 300th anniversary celebration events"	Enacted names the town
FY2025	$50,000	"Shrewsbury Youth and Family Services, Inc. in Shrewsbury to provide mental health services in the commonwealth"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Shrewsbury received 74% of its proportional share of competitive grant awards.

Local road miles **151.4** 32nd of 351 · 3.9 per 1,000 residents (282nd of 351)	Town-owned bridges, replacement cost **$14.3M** scored exposure $4.8M · three in poor condition	Road-stream crossings **235** 6th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **20.7 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **38,994** residents plus seasonal	Core infrastructure index **0.63** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **29 acres** 0.2% of land area · FY2026	State-owned land PILOT, FY2026 **$49,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,672** statewide $117 · FY2026	New growth per resident **$22,028** FY2017–2025 · 159th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.4% of Shrewsbury's general-fund spending in FY2025, down from 25.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **25.5%** $21.1M of $82.5M · median town 14.1%	FY2016 **23.8%** $25.6M of $107M · median town 12.2%	FY2025 **15.4%** $25.5M of $165M · median town 11.5%	Net of state charges, FY2025 **14.6%** FY2010: 27.3% · median town 10.0%

Shrewsbury's state aid did not keep pace with either price measure: FY2025 aid was 22.1% below its FY2006 aid grown by Boston-area consumer prices and 30.7% below grown by the government price index.

Gross state aid went from $21.1 million in FY2006 to $25.5 million in FY2025, +20.9% in dollars. Flag: in FY2010, $3.5 million of Shrewsbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+108.4%** $8.8M to $18.4M · all towns +54.0%	All fixed costs, FY2016–25 **+65.0%** $15.5M to $25.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Shrewsbury's health insurance would have been $11 million in FY2025; it was $18.4 million, $7.39 million above the path. Its fixed costs would have been $19.4 million in FY2025; it was $25.7 million, $6.24 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Shrewsbury came to $816,000, 8.5% of the $9.59 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$816,000	8.5%	28.2%
Placed in the town	$816,000	8.5%	42.3%
Everything placed	$816,000	8.5%	45.2%

SCHOOLS

Shrewsbury's required school contribution is 3.1% of median household income, 42nd highest of 351.

Chapter 70 aid, FY2026 **$22.5M** to the town's district	Required local contribution **$64.5M** FY2026
Share of household income **3.1%** 42nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–14%** after inflation

Shrewsbury runs its own school district.

EXPECTED AND ACTUAL

Shrewsbury received $7.3 million in earmarks placed in the town and competitive grants over ten years, 83% of the $8.8 million its size, need and institutions predict.

PEERS

Shrewsbury ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Shrewsbury this town	**36**	**$8,418**	**$158**	**$25.41**	**0.74**	**3.1%**
Tewksbury peer	38	$8,861	$181	$57.89	0.24	2.8%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Franklin peer	49	$12,355	$201	$73.18	0.69	3.1%
Mansfield peer	46	$11,457	$163	$30.37	0.28	3.4%
Billerica peer	39	$9,140	$64.58	$21.52	0.29	2.7%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Shutesbury

Town · Franklin County · 1,910 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Hampden · Aaron L. Saunders

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Shutesbury Public Schools, the town's own district

Amherst-Pelham Regional School District, shared with Amherst, Leverett and Pelham

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Shutesbury scores 62 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

62 / 100

37th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	69	60	56

Rank under other weightings: 24th to 52nd.

Stable high: above 55 under every weighting

Shutesbury received more than its share of state aid on all four measures; its blended score of 62 stays between 60 and 64 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

8th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
97	98	97	96

Rank under other weightings: 4th to 13th.

Stable high: above 55 under every weighting

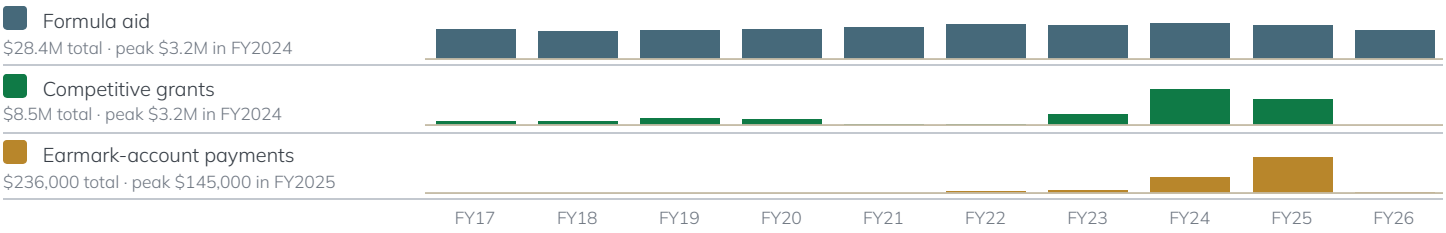
Shutesbury received more than its share of discretionary money on all four measures; its blended score of 97 stays between 97 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Shutesbury's town government and school districts received $28.4 million in formula aid and $8.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$28.4M	$8.5M	$236,000
$14,882 per resident (74th of 351) · gross	$4,462 per resident (18th of 351)	$123 per resident (18th of 351)

Competitive grants to Shutesbury peaked in FY2024 at $3.2 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.1 million, are not shown.

EARMARKS

No local earmark was placed in Shutesbury in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $236,000 in payments to Shutesbury's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Shutesbury.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Shutesbury's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Millville	$360,000	$360,000	$360,000	$114
Windsor	$25,000	$25,000	$25,000	$23.47
Ashby	$200,000	$200,000	$200,000	$62.29
Williamsburg	$10,000	$10,000	$10,000	$3.71
Brimfield	$240,000	$240,000	$240,000	$64.78

WHAT THE TOWN CARRIES

Measured against what it maintains, Shutesbury received 50% of its proportional share of competitive grant awards.

Local road miles **30.9** 323rd of 351 · 16.2 per 1,000 residents (68th of 351)	Town-owned bridges, replacement cost **$2.2M** scored exposure $443,000 · none in poor condition	Road-stream crossings **62** 223rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **26.5 sq mi** 35% state-owned	Seasonal homes **9%** share of housing units	Peak service population **2,097** residents plus seasonal	Core infrastructure index **1.41** roads, culverts, dams, coast, flood, energy

Burden index 0.50; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **851 acres** 5.0% of land area · FY2026	State-owned land PILOT, FY2026 **$31,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$36.69** statewide $117 · FY2026	New growth per resident **$14,261** FY2017–2025 · 264th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.1% of Shutesbury's general-fund spending in FY2025, down from 18.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.6%** $856,000 of $4.6M · median town 14.1%	FY2016 **14.2%** $816,000 of $5.8M · median town 12.2%	FY2025 **14.1%** $1M of $7.2M · median town 11.5%	Net of state charges, FY2025 **11.9%** FY2010: 17.6% · median town 10.0%

Shutesbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Shutesbury's state aid did not keep pace with either price measure: FY2025 aid was 23.3% below its FY2006 aid grown by Boston-area consumer prices and 31.8% below grown by the government price index.

Gross state aid went from $856,000 in FY2006 to $1 million in FY2025, +19.0% in dollars. Flag: in FY2010, $184,000 of Shutesbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.6%** $369,000 to $534,000 · all towns +54.0%	All fixed costs, FY2016–25 **+41.5%** $640,000 to $905,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Shutesbury's health insurance would have been $461,000 in FY2025; it was $534,000, $73,000 above the path. Its fixed costs would have been $799,000 in FY2025; it was $905,000, $106,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Shutesbury came to $0, 0.0% of the $165,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Shutesbury's required school contribution is 2.0% of median household income, 312th highest of 351.

Chapter 70 aid, FY2026 **$1.6M** to the town's district	Required local contribution **$1.8M** FY2026
Share of household income **2.0%** 312th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–5%** after inflation

Shutesbury runs its own district for some grades and belongs to Amherst-Pelham for others; Shutesbury accounts for 8% of that district's foundation budget.

EXPECTED AND ACTUAL

Shutesbury received $8.5 million in earmarks placed in the town and competitive grants over ten years, 2.2 times the $3.9 million its size, need and institutions predict.

PEERS

Shutesbury is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Shutesbury this town	**62**	**$14,882**	**$4,462**	**$0**	**0.50**	**2.0%**
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Windsor peer	53	$9,357	$3,955	$23.47	1.38	1.5%
Ashby peer	56	$15,057	$337	$62.29	0.63	2.3%
Williamsburg peer	41	$9,541	$578	$3.71	1.40	2.2%
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Chester lowest in class of 30	61	$16,538	$4,421	$0	2.11	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Somerset

Town · Bristol County · 18,298 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
5th Bristol · Justin Thurber

STATE SENATE
First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS
Somerset Public Schools, the town's own district
Somerset Berkley Regional School District, shared with Berkley
Greater Fall River Regional Vocational Technical School District, vocational, shared with Fall River, Swansea and Westport

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Somerset scores 47 on the Fairness Index for all state aid and 22 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

151st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	48	45	48

Rank under other weightings: 143rd to 155th.

Near fair: between 45 and 55 under every weighting

Somerset received less than its share of state aid on all four measures; its blended score of 47 stays between 46 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

22 / 100

304th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
20	22	26	22

Rank under other weightings: 290th to 310th.

Stable low: below 45 under every weighting

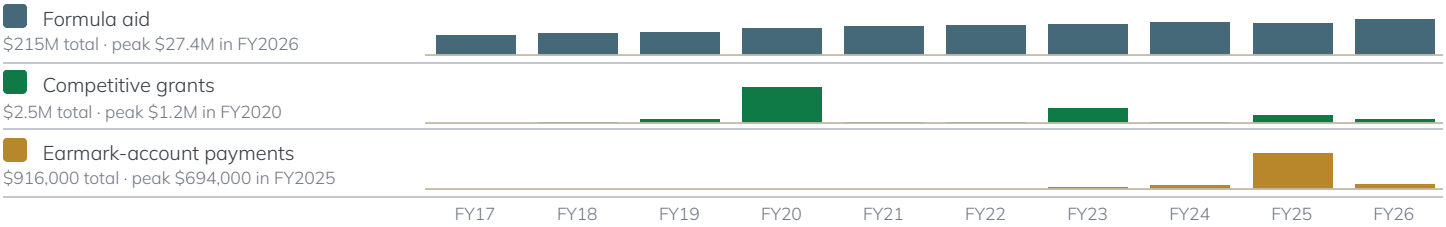
Somerset received less than its share of discretionary money on all four measures; its blended score of 22 stays between 22 and 23 under every weighting tested.

STATE MONEY, FY2017–FY2026

Somerset's town government and school districts received $215 million in formula aid and $2.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$215M	**$2.5M**	**$916,000**
$11,729 per resident (135th of 351) · gross	$136 per resident (301st of 351)	$50.06 per resident (78th of 351)

Competitive grants to Somerset peaked in FY2020 at $1.2 million, 50% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $30.7 million, are not shown.

EARMARKS

Somerset received $760,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$760,000	**$760,000**	**$760,000**	**Not a member**
$41.53 per resident (177th of 351)	$41.53 per resident (196th of 351)	$41.53 per resident (199th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names Somerset directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$250,000	"the town of Somerset to rebuild the main treatment units at the Somerset water treatment plant"	Enacted names the town
FY2025	$200,000	"the Somerset water treatment plant for the repair and replacement of water treatment pumps"	Enacted names the town
FY2026	$100,000	"conduct a feasibility study for a public safety building in the town of Somerset"	Enacted names the town
FY2024	$75,000	"as a grant to the town of Somerset for the planning and design of improvements along the state highway route 103 corridor"	Enacted names the town
FY2023	$75,000	"the design, engineering, permitting and planning of economic development enhancements and improvements in the Slade's Ferry commercial district in…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Somerset received 73% of its proportional share of competitive grant awards.

Local road miles **85.5** 137th of 351 · 4.7 per 1,000 residents (251st of 351)	Town-owned bridges, replacement cost **$871,000** scored exposure $65,000 · none in poor condition	Road-stream crossings **56** 240th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **7.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **18,317** residents plus seasonal	Core infrastructure index **1.04** roads, culverts, dams, coast, flood, energy

Burden index 0.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$164** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$72.89** statewide $117 · FY2026	New growth per resident **$13,161** FY2017–2025 · 280th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 18.8% of Somerset's general-fund spending in FY2025, up from 10.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **10.4%** $4.5M of $43.4M · median town 14.1%	FY2016 **13.7%** $7.1M of $51.7M · median town 12.2%	FY2025 **18.8%** $13.1M of $69.4M · median town 11.5%	Net of state charges, FY2025 **17.6%** FY2010: 13.2% · median town 10.0%

Somerset's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Somerset's state aid kept pace with both price measures: FY2025 aid was 87.2% above its FY2006 aid grown by Boston-area consumer prices and 66.4% above grown by the government price index.

Gross state aid went from $4.5 million in FY2006 to $13.1 million in FY2025, +190.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+6.7%** $7.4M to $7.9M · all towns +54.0%	All fixed costs, FY2016–25 **+29.2%** $10.4M to $13.5M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Somerset's health insurance would have been $9.20 million in FY2025; it was $7.86 million, $1.34 million below the path. Its fixed costs would have been $13 million in FY2025; it was $13.5 million, $447,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Somerset came to $660,000, 134.3% of the $492,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$660,000	134.3%	28.2%
Placed in the town	$660,000	134.3%	42.3%
Everything placed	$660,000	134.3%	45.2%

SCHOOLS

Somerset's required school contribution is 2.4% of median household income, 268th highest of 351.

Chapter 70 aid, FY2026 **$18.5M** to the town's district	Required local contribution **$19.7M** FY2026
Share of household income **2.4%** 268th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+39%** after inflation

Somerset runs its own district for some grades and belongs to Somerset Berkley, Greater Fall River and Bristol County for others; Somerset accounts for 75%, 11% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Somerset received $3.3 million in earmarks placed in the town and competitive grants over ten years, 69% of the $4.7 million its size, need and institutions predict.

PEERS

Somerset ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Somerset this town	**47**	**$11,729**	**$136**	**$41.53**	**0.73**	**2.4%**
Auburn peer	43	$11,124	$134	$47.46	0.32	2.6%
East Longmeadow peer	42	$11,619	$224	$13.70	0.72	3.2%
Bridgewater peer	39	$9,702	$309	$21.78	1.08	3.0%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
North Attleborough peer	44	$10,543	$156	$39.34	1.28	2.7%
Winthrop best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Middleborough lowest in class of 30	45	$12,235	$110	$13.47	0.78	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Somerville

City · Middlesex County · 81,036 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

27th Middlesex · Erika Uyterhoeven
57% of residents

34th Middlesex · Christine P. Barber
29% of residents

26th Middlesex · Mike Connolly 14% of residents

Somerville is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Second Middlesex · Patricia D. Jehlen

SCHOOL DISTRICTS

Somerville Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Somerville scores 40 on the Fairness Index for all state aid and 61 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

215th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
32	36	53	37

Rank under other weightings: 177th to 269th.

Stable low: below 45 under every weighting

Somerville received less than its share of state aid on three of four measures; its blended score of 40 stays between 36 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

61 / 100

135th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
57	61	66	61

Rank under other weightings: 129th to 146th.

Stable high: above 55 under every weighting

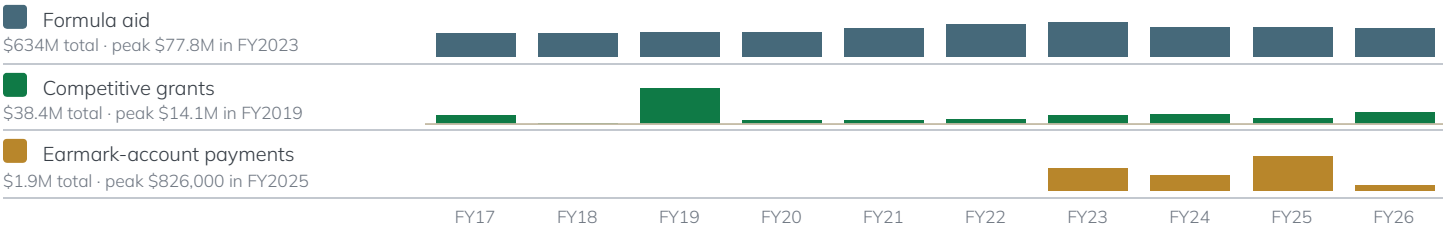
Somerville received more than its share of discretionary money on all four measures; its blended score of 61 stays between 60 and 63 under every weighting tested.

STATE MONEY, FY2017–FY2026

Somerville's town government and school districts received $634 million in formula aid and $38.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$634M	**$38.4M**	**$1.9M**
$7,819 per resident (263rd of 351) · gross	$474 per resident (146th of 351)	$23.65 per resident (180th of 351)

Competitive grants to Somerville peaked in FY2019 at $14.1 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $77.2 million, are not shown.

EARMARKS

Somerville received $2.6 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$2.6M	**$2.6M**	**$2.6M**	**Not a member**
$31.51 per resident (225th of 351)	$31.51 per resident (235th of 351)	$31.51 per resident (236th of 351)	35 municipalities had none

Placed in the town: 40 clauses in nine of ten budgets; the most recent in FY2026. Every one names Somerville directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"the city of Somerville to continue the short-term housing bridge pilot program established under item 7004-0107 of chapter 140 of the acts of 2024 to…"	Enacted names the town
FY2026	$100,000	"The Elizabeth Peabody House Association in the city of Somerville"	Enacted names the town
FY2025	$100,000	"the city of Somerville to establish a short-term housing bridge pilot program to facilitate interim housing stability for individuals applying for…"	Enacted names the town
FY2025	$100,000	"the Somerville Homeless Coalition Incorporated in the city of Somerville to support programs for homeless individuals"	Enacted names the town
FY2024	$100,000	"multimodal traffic safety improvements at the high-crash intersection of Alewife Brook parkway and Broadway in the city of Somerville"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Somerville received 2.18 times its proportional share of competitive grant awards.

Local road miles **89.9** 121st of 351 · 1.1 per 1,000 residents (350th of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $590,000 · none in poor condition	Road-stream crossings **3** 344th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.1 sq mi** 3% state-owned	Seasonal homes **0%** share of housing units	Peak service population **81,240** residents plus seasonal	Core infrastructure index **1.74** roads, culverts, dams, coast, flood, energy

Burden index 2.18; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$76,423** FY2017–2025 · 12th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.4% of Somerville's general-fund spending in FY2025, down from 35.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **35.0%** $53.4M of $153M · median town 14.1%	FY2016 **23.8%** $48.3M of $203M · median town 12.2%	FY2025 **15.4%** $54.7M of $355M · median town 11.5%	Net of state charges, FY2025 **11.1%** FY2010: 22.9% · median town 10.0%

Somerville's state aid did not keep pace with either price measure: FY2025 aid was 34.0% below its FY2006 aid grown by Boston-area consumer prices and 41.3% below grown by the government price index.

Gross state aid went from $53.4 million in FY2006 to $54.7 million in FY2025, +2.4% in dollars. Flag: in FY2010, $4.3 million of Somerville's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+50.8%** $20.8M to $31.4M · all towns +54.0%	All fixed costs, FY2016–25 **+85.2%** $35.2M to $65.2M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Somerville's health insurance would have been $26 million in FY2025; it was $31.4 million, $5.41 million above the path. Its fixed costs would have been $44 million in FY2025; it was $65.2 million, $21.2 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2025 (+44%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Somerville came to $2 million, 19.1% of the $10.6 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2M	19.1%	28.2%
Placed in the town	$2M	19.1%	42.3%
Everything placed	$2M	19.1%	45.2%

SCHOOLS

Somerville's required school contribution is 1.7% of median household income, 327th highest of 351.

Chapter 70 aid, FY2026 **$22.6M** to the town's district	Required local contribution **$78.8M** FY2026
Share of household income **1.7%** 327th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–14%** after inflation

Somerville runs its own school district.

EXPECTED AND ACTUAL

Somerville received $42.5 million in earmarks placed in the town and competitive grants over ten years, 49% more than the $28.5 million its size, need and institutions predict.

PEERS

Somerville ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Somerville this town	**40**	**$7,819**	**$474**	**$31.51**	**2.18**	**1.7%**
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Plymouth peer	28	$7,006	$268	$53.91	0.73	3.0%
Medford peer	32	$6,237	$331	$49.53	2.03	1.9%
Brookline peer	21	$5,242	$48.41	$69.97	0.36	2.0%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Mashpee lowest in class of 30	26	$6,045	$173	$12.51	0.72	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

South Hadley

Town · Hampshire County · 17,754 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
2nd Hampshire · Homar Gómez	**Hampden, Hampshire and Worcester** · Jacob R. Oliveira	**South Hadley Public Schools**, the town's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

South Hadley scores 39 on the Fairness Index for all state aid and 57 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

220th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	31	45	43

Rank under other weightings: 182nd to 267th.

Stable low: below 45 under every weighting

South Hadley received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

57 / 100

151st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	48	66	61

Rank under other weightings: 136th to 174th.

Weighting-dependent: the range crosses the 45–55 band

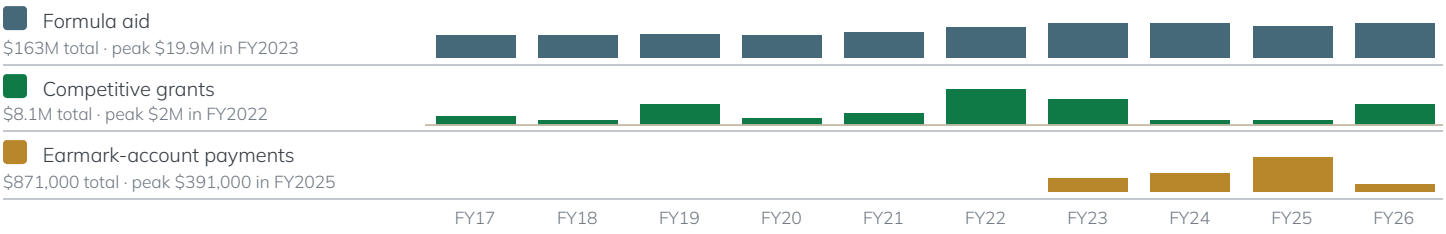
South Hadley received more than its share of discretionary money on three of four measures; its blended score of 57 stays between 54 and 61 under every weighting tested.

STATE MONEY, FY2017–FY2026

South Hadley's town government and school districts received $163 million in formula aid and $8.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$163M	**$8.1M**	**$871,000**
$9,190 per resident (210th of 351) · gross	$458 per resident (150th of 351)	$49.05 per resident (80th of 351)

Competitive grants to South Hadley peaked in FY2022 at $2 million, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.5 million, are not shown.

EARMARKS

South Hadley received $565,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$565,000	**$565,000**	**$565,000**	**Not a member**
$31.82 per resident (220th of 351)	$31.82 per resident (232nd of 351)	$31.82 per resident (233rd of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names South Hadley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$250,000	"a culinary arts program at South Hadley High School to provide vocational training to students"	Enacted names the town
FY2024	$75,000	"improvements to parking and accessibility at the Leaping Well nature trail in the town of South Hadley"	Enacted names the town
FY2019	$75,000	"the South Hadley Senior Center"	Enacted names the town
FY2026	$50,000	"radio and communications upgrades and improvements to the South Hadley fire department district 1"	Enacted names the town
FY2025	$50,000	"the maintenance and operation of Ledges golf club in the town of South Hadley"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, South Hadley received 1.61 times its proportional share of competitive grant awards.

Local road miles **84.9** 138th of 351 · 4.8 per 1,000 residents (245th of 351)	Town-owned bridges, replacement cost **$6.8M** scored exposure $2.4M · one in poor condition	Road-stream crossings **73** 186th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **17.7 sq mi** 11% state-owned	Seasonal homes **1%** share of housing units	Peak service population **17,949** residents plus seasonal	Core infrastructure index **2.21** roads, culverts, dams, coast, flood, energy

Burden index 1.61; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **693 acres** 6.1% of land area · FY2026	State-owned land PILOT, FY2026 **$50,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$72.79** statewide $117 · FY2026	New growth per resident **$9,062** FY2017–2025 · 330th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 27.7% of South Hadley's general-fund spending in FY2025, down from 34.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **34.6%** $10.8M of $31.3M · median town 14.1%	FY2016 **31.2%** $12.9M of $41.5M · median town 12.2%	FY2025 **27.7%** $15.5M of $56M · median town 11.5%	Net of state charges, FY2025 **21.7%** FY2010: 31.3% · median town 10.0%

South Hadley's state aid did not keep pace with either price measure: FY2025 aid was 7.5% below its FY2006 aid grown by Boston-area consumer prices and 17.8% below grown by the government price index.

Gross state aid went from $10.8 million in FY2006 to $15.5 million in FY2025, +43.5% in dollars. Flag: in FY2010, $1.4 million of South Hadley's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.1%** $3.7M to $5M · all towns +54.0%	All fixed costs, FY2016–25 **+56.7%** $7M to $11M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, South Hadley's health insurance would have been $4.60 million in FY2025; it was $5.05 million, $450,000 above the path. Its fixed costs would have been $8.78 million in FY2025; it was $11 million, $2.23 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming South Hadley came to $500,000, 36.6% of the $1.37 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$500,000	36.6%	28.2%
Placed in the town	$500,000	36.6%	42.3%
Everything placed	$500,000	36.6%	45.2%

SCHOOLS

South Hadley's required school contribution is 2.5% of median household income, 239th highest of 351.

Chapter 70 aid, FY2026 **$11.1M** to the town's district	Required local contribution **$16.7M** FY2026
Share of household income **2.5%** 239th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+10%** after inflation

South Hadley runs its own school district.

EXPECTED AND ACTUAL

South Hadley received $8.8 million in earmarks placed in the town and competitive grants over ten years, 56% more than the $5.7 million its size, need and institutions predict.

PEERS

South Hadley ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
South Hadley this town	**39**	**$9,190**	**$458**	**$31.82**	**1.61**	**2.5%**
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Ludlow peer	42	$10,596	$407	$132	1.85	2.8%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Southampton

Town · Hampshire County · 6,230 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Hampden · Kelly W. Pease

STATE SENATE

Hampden and Hampshire · John C. Velis

SCHOOL DISTRICTS

Southampton Public Schools, the town's own district

Hampshire Regional School District, shared with Chesterfield, Goshen, Westhampton and Williamsburg

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Southampton scores 49 on the Fairness Index for all state aid and 45 for discretionary money. Fifty is a fair share.

ALL STATE AID

49 / 100

134th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	56	46	47

Rank under other weightings: 125th to 138th.

Near fair: between 45 and 55 under every weighting

Southampton received less than its share of state aid on three of four measures; its blended score of 49 stays between 47 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

45 / 100

202nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	50	49	41

Rank under other weightings: 197th to 211th.

Weighting-dependent: the range crosses the 45–55 band

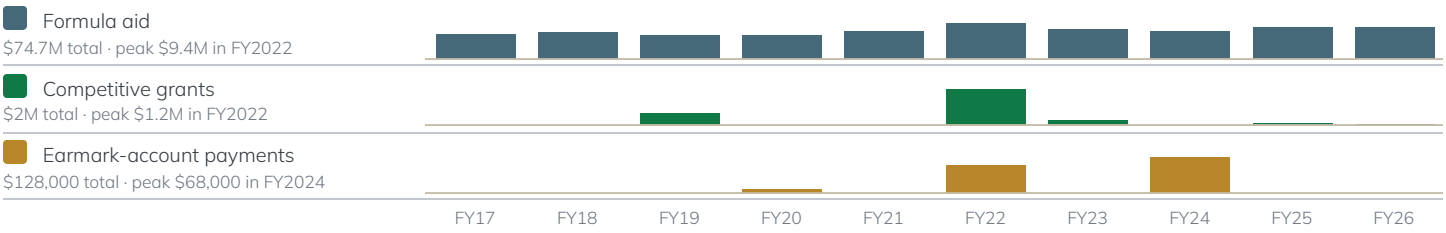
Southampton received less than its share of discretionary money on all four measures; its blended score of 45 stays between 43 and 48 under every weighting tested.

STATE MONEY, FY2017–FY2026

Southampton's town government and school districts received $74.7 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$74.7M	**$2M**	**$128,000**
$11,984 per resident (128th of 351) · gross	$317 per resident (201st of 351)	$20.59 per resident (199th of 351)

Competitive grants to Southampton peaked in FY2022 at $1.2 million, 63% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.3 million, are not shown.

EARMARKS

Southampton received $141,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$141,000	**$141,000**	**$141,000**	**Not a member**
$22.65 per resident (257th of 351)	$22.65 per resident (266th of 351)	$22.65 per resident (267th of 351)	35 municipalities had none

Placed in the town: six clauses in five of ten budgets; the most recent in FY2026. Every one names Southampton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$40,000	"Southampton Youth Athletic Association, Inc. for facility improvements"	Enacted names the town
FY2024	$35,000	"public safety improvements in the town of Southampton"	Enacted names the town
FY2026	$25,000	"the council on aging in the town of Southampton for capital improvements and programming"	Enacted names the town
FY2024	$25,000	"the town of Southampton for a new hybrid police cruiser"	Enacted names the town
FY2020	$10,000 (split four ways)	"equally between the municipalities of Russell, Southampton, Montgomery and Westfield for the maintenance and repair of war memorials"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Southampton received 1.74 times its proportional share of competitive grant awards.

Local road miles **69.7** 188th of 351 · 11.2 per 1,000 residents (93rd of 351)	Town-owned bridges, replacement cost **$14.9M** scored exposure $3.4M · none in poor condition	Road-stream crossings **61** 226th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **28.2 sq mi** 1% state-owned	Seasonal homes **2%** share of housing units	Peak service population **6,382** residents plus seasonal	Core infrastructure index **1.93** roads, culverts, dams, coast, flood, energy

Burden index 1.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **138 acres** 0.8% of land area · FY2026	State-owned land PILOT, FY2026 **$18,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$127** statewide $117 · FY2026	New growth per resident **$16,000** FY2017–2025 · 240th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 19.0% of Southampton's general-fund spending in FY2025, down from 31.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **31.2%** $3.5M of $11.1M · median town 14.1%	FY2016 **23.6%** $3.5M of $15.1M · median town 12.2%	FY2025 **19.0%** $3.9M of $20.7M · median town 11.5%	Net of state charges, FY2025 **17.4%** FY2010: 28.1% · median town 10.0%

Southampton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Southampton's state aid did not keep pace with either price measure: FY2025 aid was 26.9% below its FY2006 aid grown by Boston-area consumer prices and 35.1% below grown by the government price index.

Gross state aid went from $3.5 million in FY2006 to $3.9 million in FY2025, +13.3% in dollars. Flag: in FY2010, $243,000 of Southampton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+34.4%** $941,000 to $1.3M · all towns +54.0%	All fixed costs, FY2016–25 **+53.4%** $1.7M to $2.6M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Southampton's health insurance would have been $1.17 million in FY2025; it was $1.26 million, $89,000 above the path. Its fixed costs would have been $2.10 million in FY2025; it was $2.58 million, $480,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Southampton came to $116,000, 35.9% of the $323,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$116,000	35.9%	28.2%
Placed in the town	$116,000	35.9%	42.3%
Everything placed	$116,000	35.9%	45.2%

SCHOOLS

Southampton's required school contribution is 2.9% of median household income, 105th highest of 351.

Chapter 70 aid, FY2026 **$4.7M** to the town's district	Required local contribution **$8.1M** FY2026
Share of household income **2.9%** 105th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Southampton runs its own district for some grades and belongs to Hampshire for others; Southampton accounts for 56% of that district's foundation budget.

EXPECTED AND ACTUAL

Southampton received $2.1 million in earmarks placed in the town and competitive grants over ten years, 55% of the $3.8 million its size, need and institutions predict.

PEERS

Southampton ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Southampton this town	**49**	**$11,984**	**$317**	**$22.65**	**1.74**	**2.9%**
Berkley peer	51	$12,903	$95.35	$13.91	0.18	2.7%
Halifax peer	48	$12,543	$155	$155	0.34	2.6%
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Sturbridge peer	51	$13,598	$158	$56.22	0.74	2.5%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Shutesbury lowest in class of 30	62	$14,882	$4,462	$0	0.50	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Southborough

Town · Worcester County · 10,493 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

19th Worcester · Kate Donaghue

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Southborough Public Schools, the town's own district
Northboro-Southboro Regional School District, shared with Northborough
Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Hudson, Marlborough, Maynard, Northborough and Westborough

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Southborough scores 36 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

36 / 100

252nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	53	27	30

Rank under other weightings: 229th to 272nd.

Stable low: below 45 under every weighting

Southborough received less than its share of state aid on three of four measures; its blended score of 36 stays between 31 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

285th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	39	20	20

Rank under other weightings: 276th to 298th.

Stable low: below 45 under every weighting

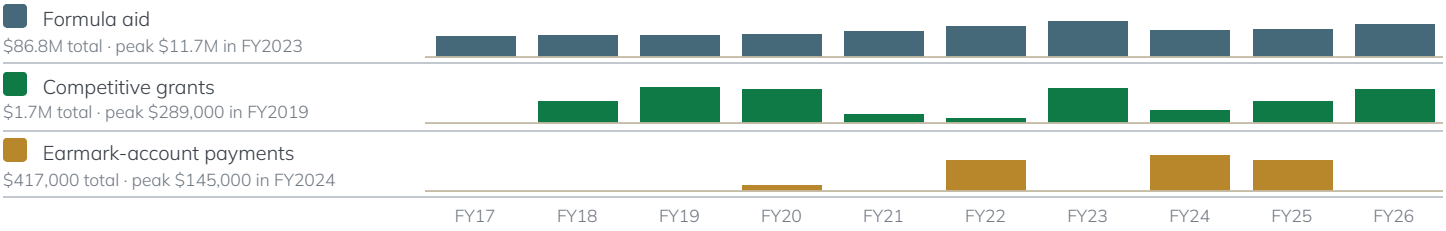
Southborough received less than its share of discretionary money on all four measures; its blended score of 26 stays between 22 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Southborough's town government and school districts received $86.8 million in formula aid and $1.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$86.8M	**$1.7M**	**$417,000**
$8,275 per resident (242nd of 351) · gross	$159 per resident (276th of 351)	$39.75 per resident (111th of 351)

Competitive grants to Southborough were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.4 million, are not shown.

EARMARKS

Southborough received $330,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$330,000	**$330,000**	**$330,000**	**Not a member**
$31.45 per resident (226th of 351)	$31.45 per resident (236th of 351)	$31.45 per resident (237th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2026. Every one names Southborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$100,000	"public safety improvements in Southborough"	Enacted names the town
FY2024	$75,000	"the town of Southborough to support initiatives to promote the environment and increase accessibility for individuals with disabilities"	Enacted names the town
FY2026	$25,000	"the town of Southborough, in support of purchasing and upgrading equipment required to host hybrid meetings"	Enacted names the town
FY2025	$25,000	"Southborough, in support of implementing recommendations to improve municipal property relative to compliance with the Americans with Disabilities Act"	Enacted names the town
FY2022	$25,000	"the town of Southborough for water infrastructure improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Southborough received 58% of its proportional share of competitive grant awards.

Local road miles **70.7** 186th of 351 · 6.7 per 1,000 residents (164th of 351)	Town-owned bridges, replacement cost **$3M** scored exposure $413,000 · none in poor condition	Road-stream crossings **114** 87th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **14.0 sq mi** 13% state-owned	Seasonal homes **0%** share of housing units	Peak service population **10,526** residents plus seasonal	Core infrastructure index **2.06** roads, culverts, dams, coast, flood, energy

Burden index 0.58; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **15 acres** 0.2% of land area · FY2026	State-owned land PILOT, FY2026 **$5,973** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$394** statewide $117 · FY2026	New growth per resident **$36,674** FY2017–2025 · 75th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.3% of Southborough's general-fund spending in FY2025, down from 14.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.9%** $5.1M of $34M · median town 14.1%	FY2016 **11.5%** $5.5M of $47.8M · median town 12.2%	FY2025 **6.3%** $3.9M of $62M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 12.7% · median town 10.0%

Southborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Southborough's state aid did not keep pace with either price measure: FY2025 aid was 50.0% below its FY2006 aid grown by Boston-area consumer prices and 55.6% below grown by the government price index.

Gross state aid went from $5.1 million in FY2006 to $3.9 million in FY2025, −22.4% in dollars. Flag: in FY2010, $2.2 million of Southborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.7%** $3.7M to $5.8M · all towns +54.0%	All fixed costs, FY2016–25 **+63.5%** $6.1M to $9.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Southborough's health insurance would have been $4.56 million in FY2025; it was $5.76 million, $1.20 million above the path. Its fixed costs would have been $7.60 million in FY2025; it was $9.95 million, $2.35 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Southborough came to $305,000, 14.5% of the $2.11 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$305,000	14.5%	28.2%
Placed in the town	$305,000	14.5%	42.3%
Everything placed	$305,000	14.5%	45.2%

SCHOOLS

Southborough's required school contribution is 2.5% of median household income, 233rd highest of 351.

Chapter 70 aid, FY2026 **$5.1M** to the town's district	Required local contribution **$18.4M** FY2026
Share of household income **2.5%** 233rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–0%** after inflation

Southborough runs its own district for some grades and belongs to Northboro-Southboro and Assabet Valley for others; Southborough accounts for 39% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Southborough received $2.1 million in earmarks placed in the town and competitive grants over ten years, 55% of the $3.8 million its size, need and institutions predict.

PEERS

Southborough ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Southborough this town	**36**	**$8,275**	**$159**	**$31.45**	**0.58**	**2.5%**
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Middleton peer	30	$6,815	$154	$32.88	0.83	2.6%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%
Wayland peer	33	$8,090	$399	$51.45	1.55	2.6%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Southbridge

City · Worcester County · 17,928 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
6th Worcester · John J. Marsi

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Southbridge Public Schools, the city's own district
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Oxford, Paxton, Rutland, Spencer and one other

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Southbridge scores 68 on the Fairness Index for all state aid and 78 for discretionary money. Fifty is a fair share.

ALL STATE AID

68 / 100

16th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	59	69	74

Rank under other weightings: 13th to 24th.

Stable high: above 55 under every weighting

Southbridge received more than its share of state aid on all four measures; its blended score of 68 stays between 65 and 71 under every weighting tested.

DISCRETIONARY MONEY ONLY

78 / 100

79th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
80	70	80	83

Rank under other weightings: 71st to 86th.

Stable high: above 55 under every weighting

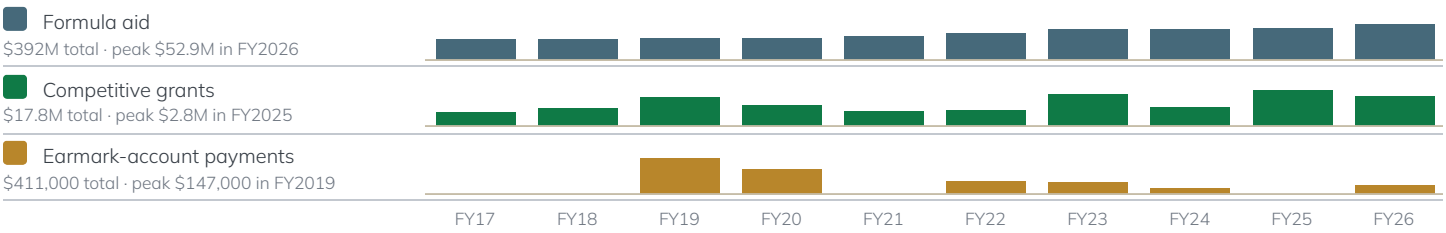
Southbridge received more than its share of discretionary money on all four measures; its blended score of 78 stays between 76 and 80 under every weighting tested.

STATE MONEY, FY2017–FY2026

Southbridge's town government and school districts received $392 million in formula aid and $17.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$392M	$17.8M	$411,000
$21,891 per resident (19th of 351) · gross	$992 per resident (78th of 351)	$22.92 per resident (185th of 351)

Competitive grants to Southbridge were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $25.2 million, are not shown.

EARMARKS

Southbridge received $604,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$604,000	$604,000	$604,000	Not a member
$33.72 per resident (211th of 351)	$33.72 per resident (223rd of 351)	$33.72 per resident (226th of 351)	35 municipalities had none

Placed in the town: 14 clauses in eight of ten budgets; the most recent in FY2026. Every one names Southbridge directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$100,000	"the purchase of public safety communications equipment in the town of Southbridge"	Enacted names the town
FY2023	$65,000	"the town of Southbridge for asbestos remediation"	Enacted names the town
FY2023	$50,000	"the town of Southbridge for the design and construction of a veterans war memorial"	Enacted names the town
FY2022	$50,000	"the town of Southbridge for heating, ventilation and air conditioning system improvements at the town's public safety facility"	Enacted names the town
FY2020	$50,000	"the Southbridge Fire Department to purchase extraction equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Southbridge received 1.54 times its proportional share of competitive grant awards.

Local road miles **80.0** 156th of 351 · 4.5 per 1,000 residents (262nd of 351)	Town-owned bridges, replacement cost **$30.8M** scored exposure $9.3M · three in poor condition	Road-stream crossings **130** 64th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **20.2 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,928** residents plus seasonal	Core infrastructure index **0.32** roads, culverts, dams, coast, flood, energy

Burden index 1.54; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **153 acres** 1.2% of land area · FY2026	State-owned land PILOT, FY2026 **$7,128** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$46.62** statewide $117 · FY2026	New growth per resident **$10,000** FY2017–2025 · 324th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 51.8% of Southbridge's general-fund spending in FY2025, down from 52.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **52.6%** $19.8M of $37.5M · median town 14.1%	FY2016 **46.4%** $23.2M of $49.9M · median town 12.2%	FY2025 **51.8%** $37.3M of $72M · median town 11.5%	Net of state charges, FY2025 **45.9%** FY2010: 44.5% · median town 10.0%

Southbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Southbridge's state aid kept pace with both price measures: FY2025 aid was 21.8% above its FY2006 aid grown by Boston-area consumer prices and 8.3% above grown by the government price index.

Gross state aid went from $19.8 million in FY2006 to $37.3 million in FY2025, +88.9% in dollars. Flag: in FY2010, $1.2 million of Southbridge's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+73.4%** $3M to $5.3M · all towns +54.0%	All fixed costs, FY2016–25 **+53.8%** $7.4M to $11.4M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Southbridge's health insurance would have been $3.78 million in FY2025; it was $5.25 million, $1.47 million above the path. Its fixed costs would have been $9.23 million in FY2025; it was $11.4 million, $2.14 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (+37%); fixed costs changed by more than 30% in one year in FY2024 (−44%) and FY2025 (+112%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Southbridge came to $579,000, 26.1% of the $2.22 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$579,000	26.1%	28.2%
Placed in the town	$579,000	26.1%	42.3%
Everything placed	$579,000	26.1%	45.2%

SCHOOLS

Southbridge's required school contribution is 2.3% of median household income, 277th highest of 351.

Chapter 70 aid, FY2026 **$37.7M** to the town's district	Required local contribution **$11.1M** FY2026
Share of household income **2.3%** 277th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+30%** after inflation

Southbridge runs its own school district and also belongs to Southern Worcester; Southbridge accounts for 17% of that district's foundation budget.

EXPECTED AND ACTUAL

Southbridge received $18.5 million in earmarks placed in the town and competitive grants over ten years, 18% more than the $15.7 million its size, need and institutions predict.

PEERS

Southbridge ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Southbridge this town	**68**	**$21,891**	**$992**	**$33.72**	**1.54**	**2.3%**
Gardner peer	60	$17,461	$784	$85.79	2.19	2.3%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
Greenfield peer	53	$14,180	$1,705	$134	4.81	2.9%
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Southwick

Town · Hampden County · 9,217 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Hampden · Nicholas A. Boldyga

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Southwick-Tolland-Granville Regional School District, shared with Granville and Tolland

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Southwick scores 56 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

72nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	60	58	51

Rank under other weightings: 55th to 96th.

Weighting-dependent: the range crosses the 45–55 band

Southwick received more than its share of state aid on all four measures; its blended score of 56 stays between 54 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

111th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
69	72	71	64

Rank under other weightings: 107th to 117th.

Stable high: above 55 under every weighting

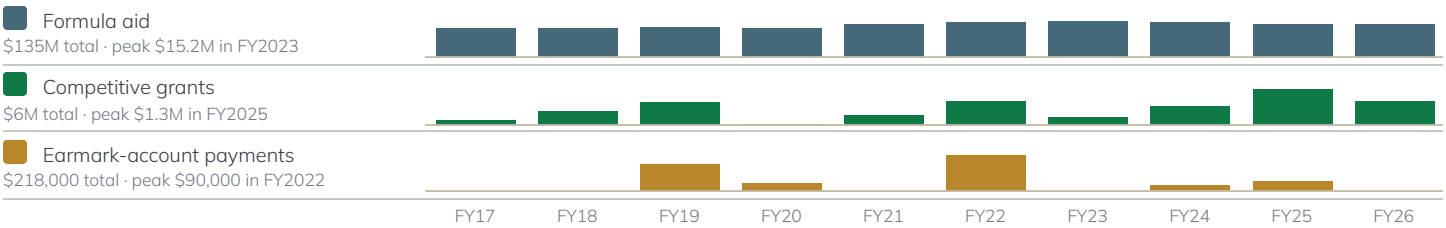
Southwick received more than its share of discretionary money on all four measures; its blended score of 69 stays between 68 and 71 under every weighting tested.

STATE MONEY, FY2017–FY2026

Southwick's town government and school districts received $135 million in formula aid and $6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$135M	**$6M**	**$218,000**
$14,645 per resident (79th of 351) · gross	$652 per resident (117th of 351)	$23.61 per resident (181st of 351)

Competitive grants to Southwick peaked in FY2025 at $1.3 million, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.9 million, are not shown.

EARMARKS

Southwick received $528,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$528,000	**$528,000**	**$528,000**	**Not a member**
$57.30 per resident (124th of 351)	$57.30 per resident (147th of 351)	$57.30 per resident (154th of 351)	35 municipalities had none

Placed in the town: 14 clauses in seven of ten budgets; the most recent in FY2025. Every one names Southwick directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$142,000	"maintenance equipment in the town of Southwick"	Enacted names the town
FY2022	$75,000	"the purchase of equipment necessary to upgrade the infrastructure of public safety radio equipment to improve the public safety in the town of…"	Enacted names the town
FY2024	$50,000	"facility improvements to the Southwick Recreation Center located in the town of Southwick"	Enacted names the town
FY2019	$50,000	"classroom upgrades at the Woodland, Powder Mill and High Schools in the town of Southwick"	Enacted names the town
FY2018	$50,000	"classroom safety and security upgrades at the Woodland, Powder Mill and High Schools in the Town of Southwick"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Southwick received 77% of its proportional share of competitive grant awards.

Local road miles **74.5** 175th of 351 · 8.1 per 1,000 residents (135th of 351)	Town-owned bridges, replacement cost **$8M** scored exposure $1.7M · none in poor condition	Road-stream crossings **108** 102nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.8 sq mi** 2% state-owned	Seasonal homes **0%** share of housing units	Peak service population **9,217** residents plus seasonal	Core infrastructure index **1.35** roads, culverts, dams, coast, flood, energy

Burden index 0.77; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **432 acres** 2.2% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$126** statewide $117 · FY2026	New growth per resident **$14,583** FY2017–2025 · 259th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.0% of Southwick's general-fund spending in FY2025, down from 8.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **8.6%** $1.2M of $14.3M · median town 14.1%	FY2016 **6.5%** $1.3M of $20.4M · median town 12.2%	FY2025 **6.0%** $1.7M of $29.2M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 7.1% · median town 10.0%

Southwick's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.8 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Southwick's state aid did not keep pace with either price measure: FY2025 aid was 8.4% below its FY2006 aid grown by Boston-area consumer prices and 18.6% below grown by the government price index.

Gross state aid went from $1.2 million in FY2006 to $1.7 million in FY2025, +42.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+66.0%** $461,000 to $766,000 · all towns +54.0%	All fixed costs, FY2016–25 **+71.2%** $1.8M to $3.2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Southwick's health insurance would have been $576,000 in FY2025; it was $766,000, $190,000 above the path. Its fixed costs would have been $2.30 million in FY2025; it was $3.16 million, $854,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Southwick came to $528,000, 173.5% of the $304,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$528,000	173.5%	28.2%
Placed in the town	$528,000	173.5%	42.3%
Everything placed	$528,000	173.5%	45.2%

SCHOOLS

Southwick's required school contribution is 2.4% of median household income, 262nd highest of 351.

Chapter 70 aid, FY2026 **$9.1M** attributed to the town	Required local contribution **$11M** FY2026
Share of household income **2.4%** 262nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Southwick has no school district of its own. Its pupils attend Southwick and Southwick Tolland; Southwick accounts for 100% and 87% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Southwick received $6.8 million in earmarks placed in the town and competitive grants over ten years, 22% more than the $5.6 million its size, need and institutions predict.

PEERS

Southwick ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Southwick this town	**56**	**$14,645**	**$652**	**$57.30**	**0.77**	**2.4%**
West Bridgewater peer	41	$10,584	$177	$65.30	0.30	2.9%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Spencer

Town · Worcester County · 12,008 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Worcester · Donald R. Berthiaume, Jr.
76% of residents

6th Worcester · John J. Marsi 24% of residents

Spencer is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Spencer-E Brookfield Regional School District, shared with East Brookfield
Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Oxford, Paxton, Rutland, Southbridge and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Spencer scores 59 on the Fairness Index for all state aid and 70 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

49th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	50	61	66

Rank under other weightings: 35th to 73rd.

Stable high: above 55 under every weighting

Spencer received more than its share of state aid on three of four measures; its blended score of 59 stays between 56 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

70 / 100

107th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	62	72	76

Rank under other weightings: 96th to 123rd.

Stable high: above 55 under every weighting

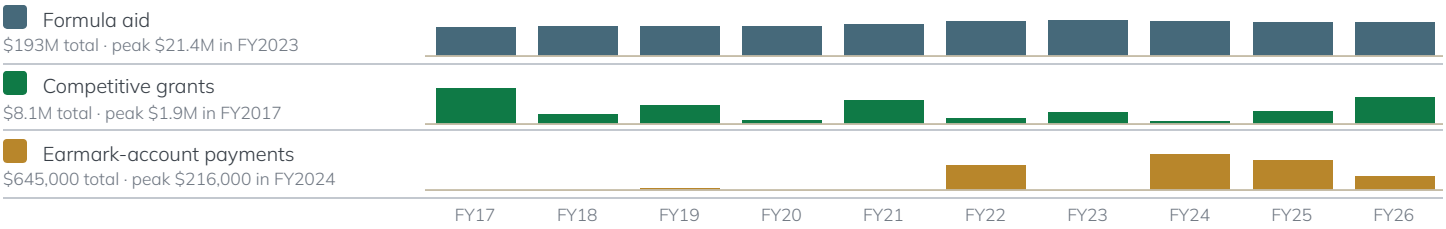
Spencer received more than its share of discretionary money on all four measures; its blended score of 70 stays between 67 and 73 under every weighting tested.

STATE MONEY, FY2017–FY2026

Spencer's town government and school districts received $193 million in formula aid and $8.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$193M	**$8.1M**	**$645,000**
$16,090 per resident (59th of 351) · gross	$675 per resident (116th of 351)	$53.75 per resident (71st of 351)

Competitive grants to Spencer peaked in FY2017 at $1.9 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5 million, are not shown.

EARMARKS

Spencer received $716,000 in local earmarks naming the town, $666,000 placed in the town and $716,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$716,000	**$666,000**	**$716,000**	**Not a member**
$59.63 per resident (117th of 351)	$55.46 per resident (152nd of 351)	$59.63 per resident (146th of 351)	35 municipalities had none

Placed in the town: nine clauses in six of ten budgets; the most recent in FY2026. Every one names Spencer directly.

Names the town includes $50,000 in clauses that name Spencer but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Spencer (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$200,000	"roof repairs for the Richard Sugden Library in the town of Spencer"	Enacted names the town
FY2022	$150,000	"the purchase of a wood chipper and a hook and go truck for the town of Spencer"	Enacted names the town
FY2026	$100,000	"the town of Spencer for the repair and repaving of East Charlton road"	Enacted names the town
FY2023	$100,000	"an accessible playground at Power Mill park in the town of Spencer"	Enacted names the town
FY2025	$55,000	"the town of Spencer for improvements at the police department and for the purchase of a rescue truck for the fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Spencer received 85% of its proportional share of competitive grant awards.

Local road miles **99.1** 98th of 351 · 8.3 per 1,000 residents (134th of 351)	Town-owned bridges, replacement cost **$11.2M** scored exposure $2.3M · one in poor condition	Road-stream crossings **189** 15th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **32.9 sq mi** 9% state-owned	Seasonal homes **3%** share of housing units	Peak service population **12,372** residents plus seasonal	Core infrastructure index **0.88** roads, culverts, dams, coast, flood, energy

Burden index 0.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,557 acres** 7.4% of land area · FY2026	State-owned land PILOT, FY2026 **$129,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$83.03** statewide $117 · FY2026	New growth per resident **$13,649** FY2017–2025 · 269th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.8% of Spencer's general-fund spending in FY2025, down from 18.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.4%** $2.4M of $13.2M · median town 14.1%	FY2016 **13.5%** $2.4M of $17.7M · median town 12.2%	FY2025 **11.8%** $3.2M of $26.8M · median town 11.5%	Net of state charges, FY2025 **11.3%** FY2010: 14.6% · median town 10.0%

Spencer's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $13.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Spencer's state aid did not keep pace with either price measure: FY2025 aid was 16.1% below its FY2006 aid grown by Boston-area consumer prices and 25.5% below grown by the government price index.

Gross state aid went from $2.4 million in FY2006 to $3.2 million in FY2025, +30.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+15.8%** $821,000 to $951,000 · all towns +54.0%	All fixed costs, FY2016–25 **+127.9%** $1.2M to $2.7M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Spencer's health insurance would have been $1.03 million in FY2025; it was $951,000, $75,000 below the path. Its fixed costs would have been $1.46 million in FY2025; it was $2.66 million, $1.20 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+56%); health insurance changed by more than 30% in one year in FY2021 (+114%) and FY2022 (–62%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Spencer came to $608,000, 4.7 times the $130,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$608,000	4.7 times	28.2%
Placed in the town	$558,000	4.3 times	42.3%
Everything placed	$608,000	4.7 times	45.2%

SCHOOLS

Spencer's required school contribution is 2.5% of median household income, 208th highest of 351.

Chapter 70 aid, FY2026 **$13.6M** attributed to the town	Required local contribution **$10.7M** FY2026
Share of household income **2.5%** 208th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

Spencer has no school district of its own. Its pupils attend Spencer, Spencer East Brookfield and Southern Worcester; Spencer accounts for 100%, 83% and 10% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Spencer received $8.8 million in earmarks placed in the town and competitive grants over ten years, about the $8.9 million its size, need and institutions predict.

PEERS

Spencer ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Spencer this town	**59**	**$16,090**	**$675**	**$55.46**	**0.85**	**2.5%**
Montague peer	55	$14,528	$1,282	$26.53	2.38	2.7%
Webster peer	55	$14,621	$927	$27.75	0.46	2.8%
Palmer peer	58	$16,159	$720	$29.88	0.54	2.2%
Templeton peer	61	$18,577	$420	$27.27	0.60	2.0%
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Greenfield best in class of 30	53	$14,180	$1,705	$134	4.81	2.9%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Springfield

City · Hampden County · 154,749 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

11th Hampden · Bud L. Williams
28% of residents
10th Hampden · Carlos González
28% of residents
9th Hampden · Orlando Ramos 27% of residents
12th Hampden · Angelo J. Puppolo, Jr.
14% of residents
2nd Hampden · Brian M. Ashe 3% of residents

Springfield is split among five House districts. Shares are of 2020 residents.

STATE SENATE

Hampden · Adam Gómez
88% of residents
Hampden, Hampshire and Worcester · Jacob R. Oliveira
12% of residents

SCHOOL DISTRICTS

Springfield Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Springfield scores 79 on the Fairness Index for all state aid and 50 for discretionary money. Fifty is a fair share.

ALL STATE AID

79 / 100

3rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
83	74	76	83

Rank 3rd under every weighting tested.

Stable high: above 55 under every weighting

Springfield received more than its share of state aid on all four measures; its blended score of 79 stays between 77 and 82 under every weighting tested.

DISCRETIONARY MONEY ONLY

50 / 100

190th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	40	54	54

Rank under other weightings: 172nd to 198th.

Near fair: between 45 and 55 under every weighting

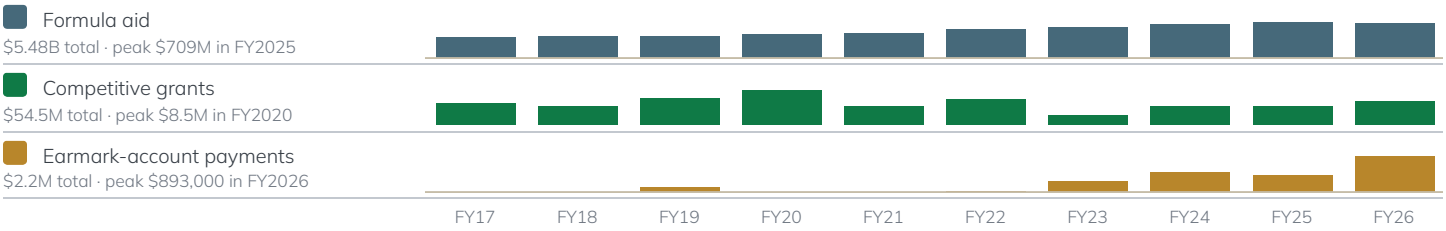
Springfield received more than its share of discretionary money on three of four measures; its blended score of 50 stays between 48 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Springfield's town government and school districts received $5.48 billion in formula aid and $54.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$5.48B	$54.5M	$2.2M
$35,424 per resident (2nd of 351) · gross	$352 per resident (187th of 351)	$14.48 per resident (232nd of 351)

Competitive grants to Springfield were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $281 million, are not shown.

EARMARKS

Springfield received $16.3 million in local earmarks naming the town, $27.5 million placed in the town and $27.7 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$16.3M	$27.5M	$27.7M	Not a member
$105 per resident (43rd of 351)	$178 per resident (14th of 351)	$179 per resident (23rd of 351)	35 municipalities had none

Placed in the town: 341 clauses in ten of ten budgets; the most recent in FY2026. $16.2 million came in clauses that name Springfield; the other $11.3 million went to organizations based in Springfield, some of which serve a wider area.

Names the town includes $125,000 in clauses that name Springfield but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $175,000 in two clauses for state facilities located in Springfield (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$800,000	"equally for the Urban League of Springfield, Inc., in the city of Springfield and the Urban League of Eastern Massachusetts, Inc."	Enacted names the town
FY2022	$800,000	"equally to the Urban League of Springfield, Inc., in the city of Springfield and the Urban League of Eastern Massachusetts, Inc"	Enacted names the town
FY2020	$400,000	"the Urban League of Springfield, Inc"	Enacted names the town
FY2019	$400,000	"the Urban League of Springfield, Inc"	Enacted names the town
FY2018	$400,000	"the Urban League of Springfield, Inc"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Springfield received 1.27 times its proportional share of competitive grant awards.

Local road miles **444.5** 2nd of 351 · 2.9 per 1,000 residents (320th of 351)	Town-owned bridges, replacement cost **$56.5M** scored exposure $23.6M · one in poor condition	Road-stream crossings **152** 38th of 351 · culverts and small crossings	Town-owned hazard dams **14** high or significant hazard
Land area **31.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **155,064** residents plus seasonal	Core infrastructure index **0.73** roads, culverts, dams, coast, flood, energy

Burden index 1.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **63 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$43,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$680** statewide $117 · FY2026	New growth per resident **$10,218** FY2017–2025 · 320th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 63.0% of Springfield's general-fund spending in FY2025, up from 58.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **58.8%** $286M of $486M · median town 14.1%	FY2016 **59.8%** $367M of $614M · median town 12.2%	FY2025 **63.0%** $580M of $920M · median town 11.5%	Net of state charges, FY2025 **51.3%** FY2010: 53.0% · median town 10.0%

Springfield's state aid kept pace with both price measures: FY2025 aid was 30.8% above its FY2006 aid grown by Boston-area consumer prices and 16.3% above grown by the government price index.

Gross state aid went from $286 million in FY2006 to $580 million in FY2025, +102.9% in dollars. Flag: in FY2010, $16.6 million of Springfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.7%** $62.4M to $82.8M · all towns +54.0%	All fixed costs, FY2016–25 **+72.8%** $108M to $187M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Springfield's health insurance would have been $77.9 million in FY2025; it was $82.8 million, $4.91 million above the path. Its fixed costs would have been $135 million in FY2025; it was $187 million, $52 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Springfield came to $14.4 million, 70.5% of the $20.4 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$14.4M	70.5%	28.2%
Placed in the town	$23.9M	117.0%	42.3%
Everything placed	$24.1M	117.9%	45.2%

SCHOOLS

Springfield's required school contribution is 1.8% of median household income, 324th highest of 351.

Chapter 70 aid, FY2026 **$546M** to the town's district	Required local contribution **$54.3M** FY2026
Share of household income **1.8%** 324th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+30%** after inflation

Springfield runs its own school district.

EXPECTED AND ACTUAL

Springfield received $99.1 million in earmarks placed in the town and competitive grants over ten years, 69% of the $143 million its size, need and institutions predict.

PEERS

Springfield ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Springfield this town	**79**	**$35,424**	**$352**	**$178**	**1.27**	**1.8%**
Worcester peer	65	$19,940	$387	$93.01	0.90	2.4%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Lowell peer	70	$24,024	$384	$66.99	0.82	2.3%
Lawrence peer	81	$35,983	$392	$72.86	1.09	1.0%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Sterling

Town · Worcester County · 8,183 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Worcester · Meghan K. Kilcoyne

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Wachusett Regional School District, shared with Holden, Paxton, Princeton and Rutland

Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Sterling scores 34 on the Fairness Index for all state aid and 22 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

270th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	38	32	34

Rank under other weightings: 255th to 283rd.

Stable low: below 45 under every weighting

Sterling received less than its share of state aid on all four measures; its blended score of 34 stays between 33 and 35 under every weighting tested.

DISCRETIONARY MONEY ONLY

22 / 100

305th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
21	25	21	22

Rank under other weightings: 301st to 310th.

Stable low: below 45 under every weighting

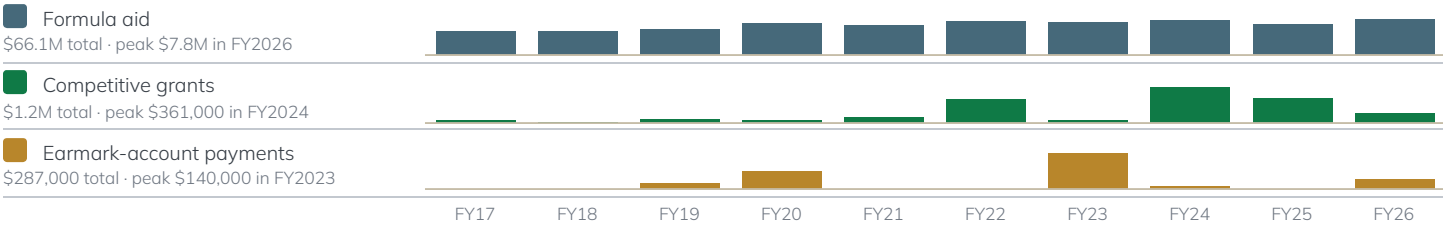
Sterling received less than its share of discretionary money on all four measures; its blended score of 22 stays between 21 and 23 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sterling's town government and school districts received $66.1 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$66.1M	**$1.2M**	**$287,000**
$8,083 per resident (251st of 351) · gross	$141 per resident (298th of 351)	$35.06 per resident (129th of 351)

Competitive grants to Sterling peaked in FY2024 at $361,000, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.4 million, are not shown.

EARMARKS

Sterling received $290,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$290,000	**$290,000**	**$290,000**	**Not a member**
$35.44 per resident (209th of 351)	$35.44 per resident (221st of 351)	$35.44 per resident (224th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names Sterling directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$75,000	"the town of Sterling for the study of West Sterling Water Source Wells access road"	Enacted names the town
FY2020	$70,000	"the town of Sterling to increase the quantity and improve the quality of athletic fields and other recreation facilities"	Enacted names the town
FY2024	$50,000	"beach erosion control, monitoring, refurbishments and related activities at Sterling town beach"	Enacted names the town
FY2025	$25,000	"the town of Sterling for an electronic sign at the Council on Aging"	Enacted names the town
FY2024	$25,000	"municipal signage and branding in the town of Sterling"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sterling received 62% of its proportional share of competitive grant awards.

Local road miles **93.8** 110th of 351 · 11.5 per 1,000 residents (92nd of 351)	Town-owned bridges, replacement cost **$5.8M** scored exposure $1.2M · one in poor condition	Road-stream crossings **113** 89th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **30.6 sq mi** 27% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,183** residents plus seasonal	Core infrastructure index **0.40** roads, culverts, dams, coast, flood, energy

Burden index 0.62; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **63 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$43,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$688** statewide $117 · FY2026	New growth per resident **$16,876** FY2017–2025 · 231st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.4% of Sterling's general-fund spending in FY2025, down from 4.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.3%** $755,000 of $17.5M · median town 14.1%	FY2016 **8.2%** $1.8M of $21.4M · median town 12.2%	FY2025 **3.4%** $1M of $29.4M · median town 11.5%	Net of state charges, FY2025 **3.1%** FY2010: 9.0% · median town 10.0%

Sterling's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sterling's state aid did not keep pace with either price measure: FY2025 aid was 14.1% below its FY2006 aid grown by Boston-area consumer prices and 23.7% below grown by the government price index.

Gross state aid went from $755,000 in FY2006 to $1 million in FY2025, +33.2% in dollars. Flag: in FY2010, $1 million of Sterling's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+35.3%** $1.1M to $1.4M · all towns +54.0%	All fixed costs, FY2016–25 **+79.7%** $1.8M to $3.2M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 5** years it grew faster than allowed levy growth · four years not reported

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sterling's health insurance would have been $1.32 million in FY2025; it was $1.43 million, $110,000 above the path. Its fixed costs would have been $2.21 million in FY2025; it was $3.18 million, $969,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sterling came to $215,000, 57.5% of the $374,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$215,000	57.5%	28.2%
Placed in the town	$215,000	57.5%	42.3%
Everything placed	$215,000	57.5%	45.2%

SCHOOLS

Sterling's required school contribution is 2.6% of median household income, 200th highest of 351.

Chapter 70 aid, FY2026 **$2.7M** attributed to the town	Required local contribution **$10.9M** FY2026
Share of household income **2.6%** 200th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–4%** after inflation

Sterling has no school district of its own. Its pupils attend Wachusett and Montachusett; Sterling accounts for 14% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Sterling received $1.5 million in earmarks placed in the town and competitive grants over ten years, 50% of the $3 million its size, need and institutions predict.

PEERS

Sterling ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sterling this town	**34**	**$8,083**	**$141**	**$35.44**	**0.62**	**2.6%**
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Sutton peer	44	$10,223	$840	$107	1.91	3.1%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Mendon peer	50	$13,851	$425	$113	1.05	3.6%
Rochester peer	43	$11,142	$331	$50.54	0.45	3.3%
Seekonk lowest in class of 30	31	$7,825	$53.68	$16.99	1.67	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Stockbridge

Town · Berkshire County · 2,056 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Berkshire Hills Regional School District, shared with Great Barrington and West Stockbridge

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Stockbridge scores 42 on the Fairness Index for all state aid and 86 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100
189th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	46	45	44

Rank under other weightings: 166th to 223rd.

Stable low: below 45 under every weighting

Stockbridge received less than its share of state aid on all four measures; its blended score of 42 stays between 41 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

86 / 100
56th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
87	91	74	91

Rank under other weightings: 47th to 63rd.

Stable high: above 55 under every weighting

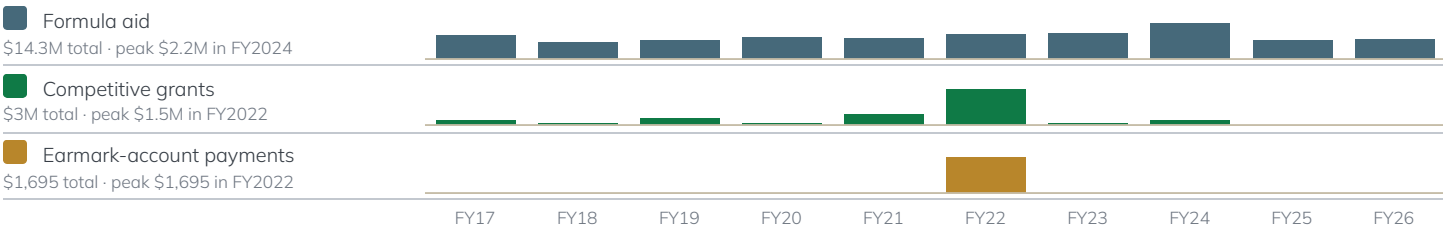
Stockbridge received more than its share of discretionary money on all four measures; its blended score of 86 stays between 83 and 89 under every weighting tested.

STATE MONEY, FY2017–FY2026

Stockbridge's town government and school districts received $14.3 million in formula aid and $3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$14.3M	$3M	$1,695
$6,979 per resident (290th of 351) · gross	$1,448 per resident (59th of 351)	$0.82 per resident (329th of 351)

Competitive grants to Stockbridge peaked in FY2022 at $1.5 million, 51% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.7 million, are not shown.

EARMARKS

Stockbridge received $163,000 in local earmarks naming the town, $288,000 placed in the town and $288,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$163,000	$288,000	$288,000	Not a member
$79.28 per resident (74th of 351)	$140 per resident (34th of 351)	$140 per resident (41st of 351)	35 municipalities had none

Placed in the town: six clauses in four of ten budgets; the most recent in FY2026. $163,000 came in clauses that name Stockbridge; the other $125,000 went to organizations based in Stockbridge, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$75,000	"the Norman Rockwell Museum, Inc. to showcase illustration art to reflect and shape society and advance the enduring Rockwell values of kindness..."	Enacted recipient based here
FY2026	$50,000	"the Berkshire Theatre Group for repairs and the replacement of the roof at the historical playhouse in the town of Stockbridge"	Enacted names the town
FY2024	$50,000	"lighting and other wayfinding improvements to the public parking areas of the Berkshire Theatre Group, Inc. located in the town of Stockbridge..."	Enacted names the town
FY2022	$50,000	"the Berkshire Theatre Group for use in summer programing"	Enacted recipient based here
FY2024	$38,000	"the restoration of the historic blue steps at the Naumkeag house in the town of Stockbridge"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Stockbridge received 2.33 times its proportional share of competitive grant awards.

Local road miles **42.5** 281st of 351 · 20.7 per 1,000 residents (57th of 351)	Town-owned bridges, replacement cost **$13.1M** scored exposure $7.9M · three in poor condition	Road-stream crossings **105** 111th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.7 sq mi** 8% state-owned	Seasonal homes **43%** share of housing units	Peak service population **3,626** residents plus seasonal	Core infrastructure index **2.89** roads, culverts, dams, coast, flood, energy

Burden index 2.33; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **893 acres** 6.1% of land area · FY2026	State-owned land PILOT, FY2026 **$68,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$75.81** statewide $117 · FY2026	New growth per resident **$38,033** FY2017–2025 · 66th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.8% of Stockbridge's general-fund spending in FY2025, down from 2.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.0%** $132,000 of $6.6M · median town 14.1%	FY2016 **1.8%** $165,000 of $9.3M · median town 12.2%	FY2025 **1.8%** $213,000 of $11.9M · median town 11.5%	Net of state charges, FY2025 **1.4%** FY2010: 0.7% · median town 10.0%

Stockbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $359,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Stockbridge's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 4.4% above its FY2006 aid grown by Boston-area consumer prices and 7.2% below grown by the government price index.

Gross state aid went from $132,000 in FY2006 to $213,000 in FY2025, +61.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+4.6%** $511,000 to $535,000 · all towns +54.0%	All fixed costs, FY2016–25 **+32.5%** $931,000 to $1.2M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Stockbridge's health insurance would have been $639,000 in FY2025; it was $535,000, $104,000 below the path. Its fixed costs would have been $1.16 million in FY2025; it was $1.23 million, $70,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Stockbridge came to $113,000, 4.8 times the $24,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$113,000	4.8 times	28.2%
Placed in the town	$163,000	6.9 times	42.3%
Everything placed	$163,000	6.9 times	45.2%

SCHOOLS

Stockbridge's required school contribution is 1.5% of median household income, 337th highest of 351.

Chapter 70 aid, FY2026 **$440,000** attributed to the town	Required local contribution **$1.8M** FY2026
Share of household income **1.5%** 337th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+1%** after inflation

Stockbridge has no school district of its own. Its pupils attend Berkshire Hills; Stockbridge accounts for 14% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Stockbridge received $3.5 million in earmarks placed in the town and competitive grants over ten years, 76% of the $4.6 million its size, need and institutions predict.

PEERS

Stockbridge ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Stockbridge this town	**42**	**$6,979**	**$1,448**	**$140**	**2.33**	**1.5%**
Truro peer	56	$7,537	$7,483	$130	1.62	1.6%
Otis peer · lowest in class of 30	43	$6,679	$2,109	$0	1.01	2.2%
Provincetown peer	39	$4,983	$2,004	$154	1.92	0.5%
Berlin peer	32	$7,567	$464	$89.70	2.37	2.7%
Edgartown peer	55	$9,919	$2,500	$0	0.36	3.9%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Stoneham

Town · Middlesex County · 23,355 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

31st Middlesex · Michael S. Day

STATE SENATE

Fifth Middlesex · Jason M. Lewis

SCHOOL DISTRICTS

Stoneham Public Schools, the town's own district

Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Saugus, Wakefield and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Stoneham scores 28 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

319th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	30	30	27

Rank under other weightings: 302nd to 333rd.

Stable low: below 45 under every weighting

Stoneham received less than its share of state aid on all four measures; its blended score of 29 stays between 27 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

280th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	27	31	24

Rank under other weightings: 271st to 290th.

Stable low: below 45 under every weighting

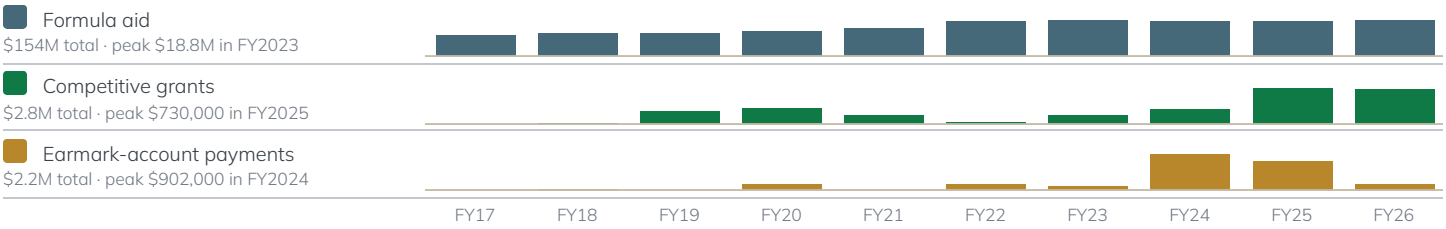
Stoneham received less than its share of discretionary money on all four measures; its blended score of 26 stays between 25 and 28 under every weighting tested.

STATE MONEY, FY2017–FY2026

Stoneham's town government and school districts received $154 million in formula aid and $2.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$154M	**$2.8M**	**$2.2M**
$6,600 per resident (312th of 351) · gross	$119 per resident (316th of 351)	$94.06 per resident (27th of 351)

Competitive grants to Stoneham peaked in FY2025 at $730,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.7 million, are not shown.

EARMARKS

Stoneham received $1.9 million in local earmarks naming the town, $2 million placed in the town and $2 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.9M	**$2M**	**$2M**	**Not a member**
$79.92 per resident (72nd of 351)	$85.70 per resident (94th of 351)	$85.70 per resident (99th of 351)	35 municipalities had none

Placed in the town: 28 clauses in ten of ten budgets; the most recent in FY2026. $1.9 million came in clauses that name Stoneham; the other $135,000 went to organizations based in Stoneham, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$200,000	"the town of Stoneham to provide assistance and services to seniors"	Enacted names the town
FY2025	$150,000	"the town of Stoneham for curriculum improvements for the Stoneham public schools"	Enacted names the town
FY2026	$100,000	"the town of Stoneham for transportation infrastructure and pedestrian accessibility improvements"	Enacted names the town
FY2024	$100,000	"the marking of the tricentennial anniversary in Stoneham"	Enacted names the town
FY2024	$100,000	"Stoneham Historical Society, Inc. for programming and facility maintenance"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Stoneham received 1.97 times its proportional share of competitive grant awards.

Local road miles **63.6** 208th of 351 · 2.7 per 1,000 residents (326th of 351)	Town-owned bridges, replacement cost **$2.3M** scored exposure $500,000 · none in poor condition	Road-stream crossings **8** 339th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **6.0 sq mi** 22% state-owned	Seasonal homes **0%** share of housing units	Peak service population **23,393** residents plus seasonal	Core infrastructure index **4.51** roads, culverts, dams, coast, flood, energy

Burden index 1.97; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **26 acres** 0.7% of land area · FY2026	State-owned land PILOT, FY2026 **$4,611** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$177** statewide $117 · FY2026	New growth per resident **$16,357** FY2017–2025 · 237th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.6% of Stoneham's general-fund spending in FY2025, down from 18.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.9%** $9.3M of $49.1M · median town 14.1%	FY2016 **14.3%** $8.8M of $61.3M · median town 12.2%	FY2025 **14.6%** $13.4M of $91.7M · median town 11.5%	Net of state charges, FY2025 **9.7%** FY2010: 14.7% · median town 10.0%

Stoneham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $367,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Stoneham's state aid did not keep pace with either price measure: FY2025 aid was 7.2% below its FY2006 aid grown by Boston-area consumer prices and 17.5% below grown by the government price index.

Gross state aid went from $9.3 million in FY2006 to $13.4 million in FY2025, +44.0% in dollars. Flag: in FY2010, $1.7 million of Stoneham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.8%** $7.4M to $10.8M · all towns +54.0%	All fixed costs, FY2016–25 **+44.1%** $13.8M to $19.8M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Stoneham's health insurance would have been $9.29 million in FY2025; it was $10.8 million, $1.48 million above the path. Its fixed costs would have been $17.2 million in FY2025; it was $19.8 million, $2.64 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Stoneham came to $1.5 million, 45.5% of the $3.34 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$1.5M	45.5%	28.2%
Placed in the town	$1.7M	49.5%	42.3%
Everything placed	$1.7M	49.5%	45.2%

SCHOOLS

Stoneham's required school contribution is 2.6% of median household income, 188th highest of 351.

Chapter 70 aid, FY2026 **$8.3M** to the town's district	Required local contribution **$28.9M** FY2026
Share of household income **2.6%** 188th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Stoneham runs its own school district and also belongs to Northeast Metropolitan; Stoneham accounts for 5% of that district's foundation budget.

EXPECTED AND ACTUAL

Stoneham received $4.9 million in earmarks placed in the town and competitive grants over ten years, 65% of the $7.5 million its size, need and institutions predict.

PEERS

Stoneham ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Stoneham this town	**28**	**$6,600**	**$119**	**$85.70**	**1.97**	**2.6%**
Westborough peer	30	$7,679	$215	$21.64	1.49	3.7%
Easton peer	30	$7,249	$236	$53.96	1.08	3.3%
Sandwich peer	30	$7,257	$332	$24.72	0.71	2.7%
Dedham peer	28	$6,510	$161	$81.43	0.48	2.4%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Stoughton

Town · Norfolk County · 29,225 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Norfolk · Edward R. Philips 50% of residents
6th Norfolk · William C. Galvin 50% of residents

Stoughton is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr.

SCHOOL DISTRICTS

Stoughton Public Schools, the town's own district
Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Foxborough, Mansfield, Norton, Sharon and West Bridgewater

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council and Old Colony Planning Council

FAIRNESS INDEX

Stoughton scores 43 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100

180th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	43	43	42

Rank under other weightings: 171st to 203rd.

Stable low: below 45 under every weighting

Stoughton received less than its share of state aid on all four measures; its blended score of 43 stays between 43 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

179th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	50	54	50

Rank under other weightings: 170th to 185th.

Near fair: between 45 and 55 under every weighting

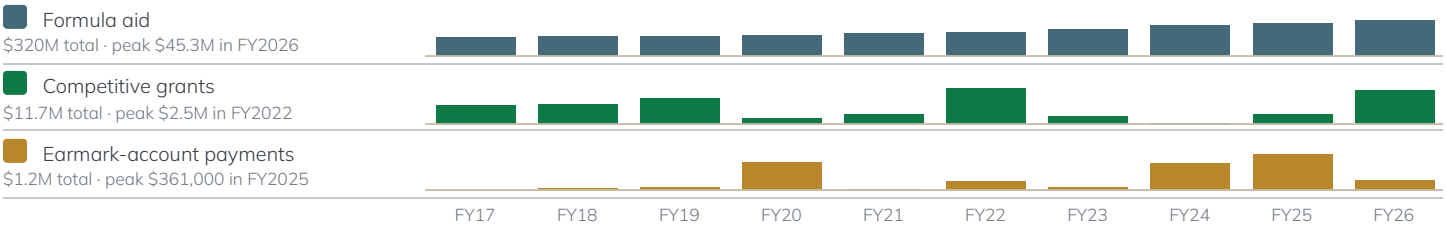
Stoughton received more than its share of discretionary money on two of four measures; its blended score of 52 stays between 50 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Stoughton's town government and school districts received $320 million in formula aid and $11.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$320M	$11.7M	$1.2M
$10,942 per resident (148th of 351) · gross	$402 per resident (167th of 351)	$40.84 per resident (107th of 351)

Competitive grants to Stoughton peaked in FY2022 at $2.5 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $21.1 million, are not shown.

EARMARKS

Stoughton received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	$1.2M	$1.2M	Not a member
$41.94 per resident (173rd of 351)	$41.94 per resident (193rd of 351)	$41.94 per resident (196th of 351)	35 municipalities had none

Placed in the town: 23 clauses in ten of ten budgets; the most recent in FY2026. Every one names Stoughton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$105,000	"in equal 138 amounts to the following substance abuse coalitions and community partnerships: (i) Braintree Community Partnership on Substance Abuse…"	Enacted names the town
FY2026	$100,000	"the town of Stoughton for planning and implementation of Stoughton's 300th anniversary celebration"	Enacted names the town
FY2024	$100,000	"renovation of the Stoughton train depot building"	Enacted names the town
FY2020	$100,000	"the restoration of the State Theatre in Stoughton"	Enacted names the town
FY2019	$100,000	"the restoration of State Theatre in Stoughton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Stoughton received 88% of its proportional share of competitive grant awards.

Local road miles **112.2** 73rd of 351 · 3.8 per 1,000 residents (287th of 351)	Town-owned bridges, replacement cost **$277,000** scored exposure $20,000 · none in poor condition	Road-stream crossings **81** 161st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.1 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **29,261** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.88; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$13,172** FY2017–2025 · 279th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 23.2% of Stoughton's general-fund spending in FY2025, up from 19.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **19.0%** $12.9M of $68M · median town 14.1%	FY2016 **21.8%** $18.9M of $86.7M · median town 12.2%	FY2025 **23.2%** $33.1M of $143M · median town 11.5%	Net of state charges, FY2025 **19.7%** FY2010: 19.5% · median town 10.0%

Stoughton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Stoughton's state aid kept pace with both price measures: FY2025 aid was 65.3% above its FY2006 aid grown by Boston-area consumer prices and 47.0% above grown by the government price index.

Gross state aid went from $12.9 million in FY2006 to $33.1 million in FY2025, +156.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+132.5%** $11.8M to $27.5M · all towns +54.0%	All fixed costs, FY2016–25 **+147.2%** $14.1M to $34.8M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Stoughton's health insurance would have been $14.8 million in FY2025; it was $27.5 million, $12.7 million above the path. Its fixed costs would have been $17.6 million in FY2025; it was $34.8 million, $17.2 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+58%); health insurance changed by more than 30% in one year in FY2024 (+67%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Stoughton came to $1.1 million, 6.8% of the $15.7 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	6.8%	28.2%
Placed in the town	$1.1M	6.8%	42.3%
Everything placed	$1.1M	6.8%	45.2%

SCHOOLS

Stoughton's required school contribution is 3.0% of median household income, 82nd highest of 351.

Chapter 70 aid, FY2026 **$32.7M** to the town's district	Required local contribution **$35.4M** FY2026
Share of household income **3.0%** 82nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+46%** after inflation

Stoughton runs its own school district and also belongs to Southeastern and Norfolk County; Stoughton accounts for 6% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Stoughton received $13.2 million in earmarks placed in the town and competitive grants over ten years, 31% more than the $10.1 million its size, need and institutions predict.

PEERS

Stoughton ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Stoughton this town	**43**	**$10,942**	**$402**	**$41.94**	**0.88**	**3.0%**
Randolph peer	46	$11,148	$123	$35.83	0.23	2.3%
Dracut peer	46	$11,847	$125	$51.31	0.50	2.5%
Middleborough peer	45	$12,235	$110	$13.47	0.78	2.8%
Agawam peer	45	$11,619	$247	$23.34	0.39	2.7%
Milford peer	54	$15,901	$146	$36.10	0.26	3.1%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Stow

Town · Middlesex County · 7,165 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Middlesex · Kate Hogan

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Nashoba Regional School District, shared with Bolton and Lancaster
Minuteman Regional Vocational Technical School District, vocational, shared with Acton, Arlington, Bolton, Concord, Dover, Lancaster, Lexington and Needham

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Stow scores 33 on the Fairness Index for all state aid and 62 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100

279th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
33	46	28	24

Rank under other weightings: 264th to 295th.

Stable low: below 45 under every weighting

Stow received less than its share of state aid on all four measures; its blended score of 33 stays between 29 and 37 under every weighting tested.

DISCRETIONARY MONEY ONLY

62 / 100

134th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	73	60	51

Rank under other weightings: 126th to 143rd.

Stable high: above 55 under every weighting

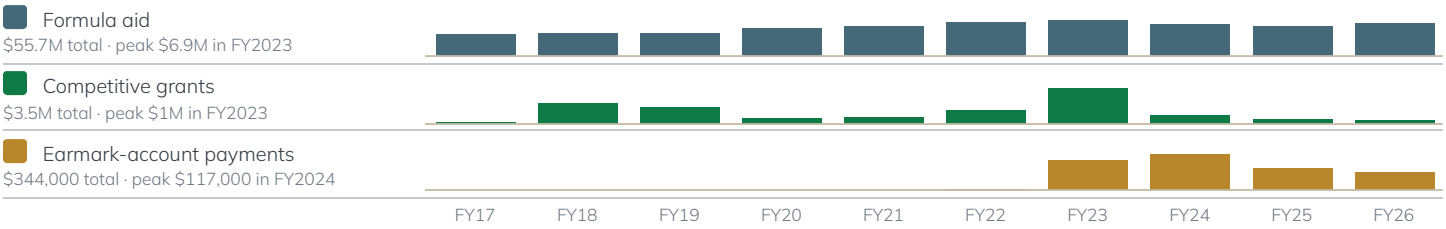
Stow received more than its share of discretionary money on all four measures; its blended score of 62 stays between 58 and 65 under every weighting tested.

STATE MONEY, FY2017–FY2026

Stow's town government and school districts received $55.7 million in formula aid and $3.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$55.7M	$3.5M	$344,000
$7,771 per resident (266th of 351) · gross	$488 per resident (141st of 351)	$48.06 per resident (82nd of 351)

Competitive grants to Stow peaked in FY2023 at $1 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.4 million, are not shown.

EARMARKS

Stow received $645,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$645,000	$645,000	$645,000	Not a member
$90.02 per resident (60th of 351)	$90.02 per resident (86th of 351)	$90.02 per resident (94th of 351)	35 municipalities had none

Placed in the town: six clauses in five of ten budgets; the most recent in FY2026. Every one names Stow directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$150,000	"the town of Stow for the development of an installation of new firefighting water cisterns"	Enacted names the town
FY2025	$150,000	"the development of an installation of new firefighting cisterns in the town of Stow"	Enacted names the town
FY2024	$150,000	"the town of Stow for the development and installation of new firefighting cisterns"	Enacted names the town
FY2022	$100,000	"the town of Stow for PFAS removal in the town's public buildings"	Enacted names the town
FY2023	$75,000	"the town of Stow for the preliminary design and repair of the Wheeler road bridge"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Stow received 2.17 times its proportional share of competitive grant awards.

Local road miles **55.0** 229th of 351 · 7.7 per 1,000 residents (143rd of 351)	Town-owned bridges, replacement cost **$7.3M** scored exposure $2.2M · two in poor condition	Road-stream crossings **68** 203rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **17.3 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **7,242** residents plus seasonal	Core infrastructure index **3.31** roads, culverts, dams, coast, flood, energy

Burden index 2.17; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$25,088** FY2017–2025 · 138th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.5% of Stow's general-fund spending in FY2025, down from 2.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.5%** $454,000 of $18.3M · median town 14.1%	FY2016 **3.7%** $969,000 of $26.2M · median town 12.2%	FY2025 **1.5%** $565,000 of $37.1M · median town 11.5%	Net of state charges, FY2025 **1.2%** FY2010: 4.1% · median town 10.0%

Stow's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Stow's state aid did not keep pace with either price measure: FY2025 aid was 19.9% below its FY2006 aid grown by Boston-area consumer prices and 28.8% below grown by the government price index.

Gross state aid went from $454,000 in FY2006 to $565,000 in FY2025, +24.2% in dollars. Flag: in FY2010, $543,000 of Stow's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+65.1%** $711,000 to $1.2M · all towns +54.0%	All fixed costs, FY2016–25 **+69.6%** $1.7M to $2.8M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Stow's health insurance would have been $888,000 in FY2025; it was $1.17 million, $286,000 above the path. Its fixed costs would have been $2.06 million in FY2025; it was $2.80 million, $737,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2024 (+30%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Stow came to $495,000, 107.0% of the $463,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$495,000	107.0%	28.2%
Placed in the town	$495,000	107.0%	42.3%
Everything placed	$495,000	107.0%	45.2%

SCHOOLS

Stow's required school contribution is 2.4% of median household income, 257th highest of 351.

Chapter 70 aid, FY2026 **$3.2M** attributed to the town	Required local contribution **$12.4M** FY2026
Share of household income **2.4%** 257th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+34%** after inflation

Stow has no school district of its own. Its pupils attend Nashoba and Minuteman; Stow accounts for 34% and 11% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Stow received $4.4 million in earmarks placed in the town and competitive grants over ten years, 49% more than the $3 million its size, need and institutions predict.

PEERS

Stow ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Stow this town	**33**	**$7,771**	**$488**	**$90.02**	**2.17**	**2.4%**
Rowley peer	41	$9,213	$259	$26.57	0.42	2.7%
Groveland peer	52	$13,007	$476	$36.55	0.95	2.5%
Freetown peer	44	$10,093	$164	$147	0.30	2.8%
Littleton peer	37	$7,885	$1,660	$62.74	5.22	3.1%
Topsfield peer	34	$8,832	$158	$67.96	1.04	2.6%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Sturbridge

Town · Worcester County · 9,960 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Hampden · Todd M. Smola

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Sturbridge Public Schools, the town's own district
Tantasqua Regional School District, shared with Brimfield, Brookfield, Holland and Wales

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Sturbridge scores 51 on the Fairness Index for all state aid and 26 for discretionary money. Fifty is a fair share.

ALL STATE AID

51 / 100

115th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	60	43	50

Rank under other weightings: 95th to 129th.

Near fair: between 45 and 55 under every weighting

Sturbridge received less than its share of state aid on two of four measures; its blended score of 51 stays between 48 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

26 / 100

282nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	33	21	24

Rank under other weightings: 274th to 290th.

Stable low: below 45 under every weighting

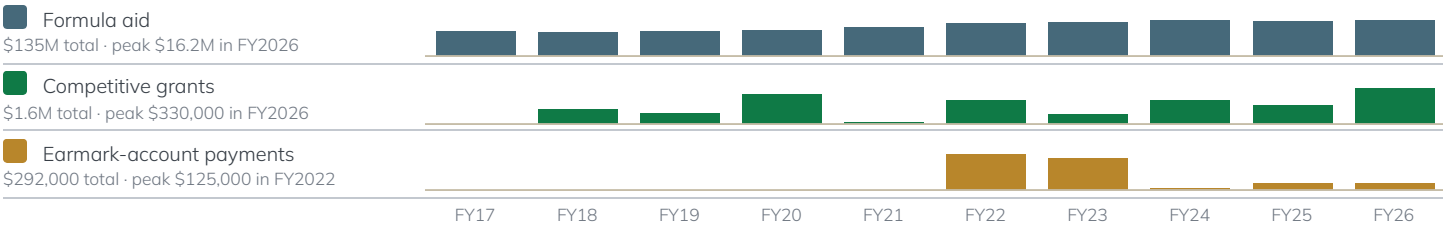
Sturbridge received less than its share of discretionary money on all four measures; its blended score of 26 stays between 24 and 28 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sturbridge's town government and school districts received $135 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$135M	**$1.6M**	**$292,000**
$13,598 per resident (104th of 351) · gross	$158 per resident (277th of 351)	$29.34 per resident (150th of 351)

Competitive grants to Sturbridge peaked in FY2026 at $330,000, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $22.7 million, are not shown.

EARMARKS

Sturbridge received $560,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$560,000	**$560,000**	**$560,000**	**Not a member**
$56.22 per resident (128th of 351)	$56.22 per resident (150th of 351)	$56.22 per resident (158th of 351)	35 municipalities had none

Placed in the town: 13 clauses in eight of ten budgets; the most recent in FY2026. Every one names Sturbridge directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$75,000	"costs related to the study, planning and engineering of a water line connection in the town of Sturbridge"	Enacted names the town
FY2023	$60,000	"the fire department in the town of Sturbridge for a new command vehicle"	Enacted names the town
FY2024	$50,000	"interior improvements to the Sturbridge senior center in the town of Sturbridge"	Enacted names the town
FY2023	$50,000	"the town of Sturbridge for tourism website development and marketing"	Enacted names the town
FY2023	$50,000	"the town of Sturbridge for the purchase of a K-9 cruiser and related equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sturbridge received 74% of its proportional share of competitive grant awards.

Local road miles **78.8** 160th of 351 · 7.9 per 1,000 residents (139th of 351)	Town-owned bridges, replacement cost **$10.4M** scored exposure $3.7M · one in poor condition	Road-stream crossings **209** 9th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **37.2 sq mi** 13% state-owned	Seasonal homes **6%** share of housing units	Peak service population **10,577** residents plus seasonal	Core infrastructure index **0.64** roads, culverts, dams, coast, flood, energy

Burden index 0.74; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,272 acres** 13.7% of land area · FY2026	State-owned land PILOT, FY2026 **$244,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$74.47** statewide $117 · FY2026	New growth per resident **$17,020** FY2017–2025 · 226th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 15.3% of Sturbridge's general-fund spending in FY2025, up from 9.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.9%** $2M of $20M · median town 14.1%	FY2016 **15.0%** $4.4M of $29.6M · median town 12.2%	FY2025 **15.3%** $6.6M of $43M · median town 11.5%	Net of state charges, FY2025 **13.7%** FY2010: 11.9% · median town 10.0%

Sturbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $5.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sturbridge's state aid kept pace with both price measures: FY2025 aid was 114.2% above its FY2006 aid grown by Boston-area consumer prices and 90.4% above grown by the government price index.

Gross state aid went from $2 million in FY2006 to $6.6 million in FY2025, +232.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+51.6%** $1.4M to $2.1M · all towns +54.0%	All fixed costs, FY2016–25 **+76.0%** $2.9M to $5.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sturbridge's health insurance would have been $1.71 million in FY2025; it was $2.08 million, $366,000 above the path. Its fixed costs would have been $3.58 million in FY2025; it was $5.05 million, $1.47 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sturbridge came to $535,000, 75.7% of the $707,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$535,000	75.7%	28.2%
Placed in the town	$535,000	75.7%	42.3%
Everything placed	$535,000	75.7%	45.2%

SCHOOLS

Sturbridge's required school contribution is 2.5% of median household income, 228th highest of 351.

Chapter 70 aid, FY2026 **$10.9M** to the town's district	Required local contribution **$13.9M** FY2026
Share of household income **2.5%** 228th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

Sturbridge runs its own district for some grades and belongs to Tantasqua for others; Sturbridge accounts for 52% of that district's foundation budget.

EXPECTED AND ACTUAL

Sturbridge received $3.6 million in earmarks placed in the town and competitive grants over ten years, 66% of the $5.4 million its size, need and institutions predict.

PEERS

Sturbridge ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sturbridge this town	**51**	**$13,598**	**$158**	**$56.22**	**0.74**	**2.5%**
Halifax peer	48	$12,543	$155	$155	0.34	2.6%
Douglas peer	58	$14,824	$571	$28.78	1.44	2.2%
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Southwick peer	56	$14,645	$652	$57.30	0.77	2.4%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Sudbury

Town · Middlesex County · 19,306 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
13th Middlesex · Carmine Lawrence Gentile

STATE SENATE
Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS
Sudbury Public Schools, the town's own district
Lincoln-Sudbury Regional School District, shared with Lincoln

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Sudbury scores 38 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

235th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	62	26	27

Rank under other weightings: 174th to 272nd.

Weighting-dependent: the range crosses the 45–55 band

Sudbury received less than its share of state aid on three of four measures; its blended score of 38 stays between 31 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100

276th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	45	24	16

Rank under other weightings: 270th to 299th.

Stable low: below 45 under every weighting

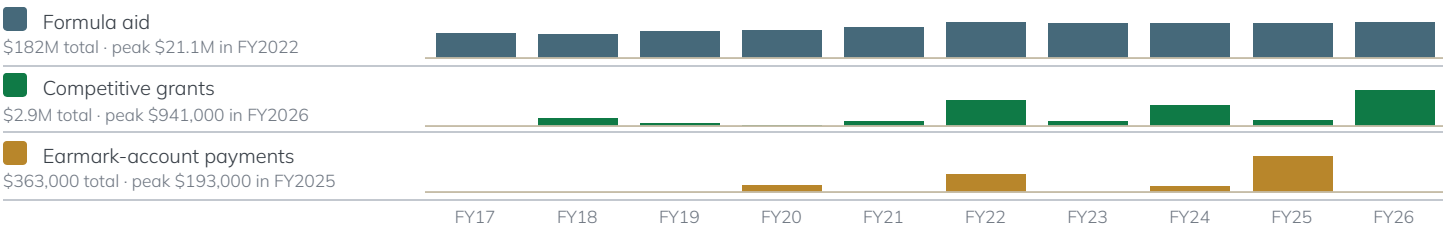
Sudbury received less than its share of discretionary money on all four measures; its blended score of 27 stays between 22 and 32 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sudbury's town government and school districts received $182 million in formula aid and $2.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$182M	**$2.9M**	**$363,000**
$9,414 per resident (199th of 351) · gross	$150 per resident (290th of 351)	$18.83 per resident (209th of 351)

Competitive grants to Sudbury peaked in FY2026 at $941,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.8 million, are not shown.

EARMARKS

Sudbury received $914,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$914,000	**$914,000**	**$914,000**	**Not a member**
$47.32 per resident (156th of 351)	$47.32 per resident (180th of 351)	$47.32 per resident (183rd of 351)	35 municipalities had none

Placed in the town: 20 clauses in ten of ten budgets; the most recent in FY2026. Every one names Sudbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$125,000	"subsidized rideshare and taxi transportation for the GoSudbury! program in the town of Sudbury"	Enacted names the town
FY2026	$100,000	"the Sudbury Community Food Pantry, Inc. for food security infrastructure"	Enacted names the town
FY2023	$100,000	"the town of Sudbury to fund an environmental sustainability director position for one year"	Enacted names the town
FY2019	$75,000	"the Sudbury Public Schools to investigate the financial and enhanced student service opportunities, benefits, and challenges created by the…"	Enacted names the town
FY2018	$75,000	"public safety improvements in Sudbury"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sudbury received 49% of its proportional share of competitive grant awards.

Local road miles **138.6** 42nd of 351 · 7.2 per 1,000 residents (152nd of 351)	Town-owned bridges, replacement cost **$7.2M** scored exposure $2.4M · 0.5 in poor condition	Road-stream crossings **135** 58th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **24.3 sq mi** 5% state-owned	Seasonal homes **1%** share of housing units	Peak service population **19,446** residents plus seasonal	Core infrastructure index **0.41** roads, culverts, dams, coast, flood, energy

Burden index 0.49; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **485 acres** 3.1% of land area · FY2026	State-owned land PILOT, FY2026 **$65,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$134** statewide $117 · FY2026	New growth per resident **$25,980** FY2017–2025 · 133rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.3% of Sudbury's general-fund spending in FY2025, down from 11.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $8.5M of $74.9M · median town 14.1%	FY2016 **8.4%** $7.5M of $89.4M · median town 12.2%	FY2025 **6.3%** $7.8M of $123M · median town 11.5%	Net of state charges, FY2025 **6.1%** FY2010: 8.7% · median town 10.0%

Sudbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.5 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sudbury's state aid did not keep pace with either price measure: FY2025 aid was 41.0% below its FY2006 aid grown by Boston-area consumer prices and 47.6% below grown by the government price index.

Gross state aid went from $8.5 million in FY2006 to $7.8 million in FY2025, –8.5% in dollars. Flag: in FY2010, $1.7 million of Sudbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+42.0%** $4.4M to $6.2M · all towns +54.0%	All fixed costs, FY2016–25 **+59.9%** $10.1M to $16.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sudbury's health insurance would have been $5.46 million in FY2025; it was $6.20 million, $746,000 above the path. Its fixed costs would have been $12.6 million in FY2025; it was $16.1 million, $3.53 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sudbury came to $784,000, 42.7% of the $1.83 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$784,000	42.7%	28.2%
Placed in the town	$784,000	42.7%	42.3%
Everything placed	$784,000	42.7%	45.2%

SCHOOLS

Sudbury's required school contribution is 2.7% of median household income, 163rd highest of 351.

Chapter 70 aid, FY2026 **$9.9M** to the town's district	Required local contribution **$39.7M** FY2026
Share of household income **2.7%** 163rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Sudbury runs its own district for some grades and belongs to Lincoln-Sudbury for others; Sudbury accounts for 87% of that district's foundation budget.

EXPECTED AND ACTUAL

Sudbury received $3.9 million in earmarks placed in the town and competitive grants over ten years, 54% of the $7.3 million its size, need and institutions predict.

PEERS

Sudbury ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sudbury this town	**38**	**$9,414**	**$150**	**$47.32**	**0.49**	**2.7%**
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Wellesley peer	28	$6,221	$46.83	$99.75	0.18	1.9%
Concord peer	34	$8,067	$148	$71.06	0.61	2.5%
Hopkinton peer	31	$7,048	$297	$94.08	0.33	3.1%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Sunderland

Town · Franklin County · 3,641 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Franklin · Natalie M. Blais

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Sunderland Public Schools, the town's own district
Frontier Regional School District, shared with Conway, Deerfield and Whately
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Sunderland scores 38 on the Fairness Index for all state aid and 49 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

236th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	30	50	33

Rank under other weightings: 188th to 282nd.

Stable low: below 45 under every weighting

Sunderland received less than its share of state aid on all four measures; its blended score of 38 stays between 34 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

49 / 100

192nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	42	54	46

Rank under other weightings: 181st to 200th.

Near fair: between 45 and 55 under every weighting

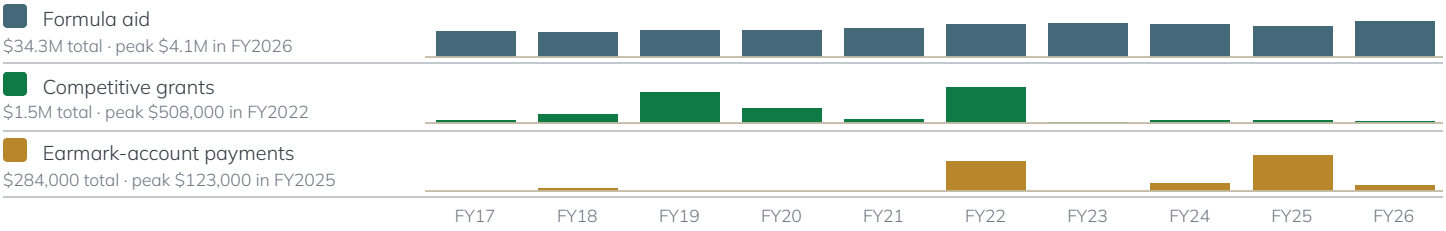
Sunderland received less than its share of discretionary money on two of four measures; its blended score of 49 stays between 46 and 52 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sunderland's town government and school districts received $34.3 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$34.3M	$1.5M	$284,000
$9,413 per resident (200th of 351) · gross	$417 per resident (161st of 351)	$78.04 per resident (36th of 351)

Competitive grants to Sunderland peaked in FY2022 at $508,000, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.7 million, are not shown.

EARMARKS

Sunderland received $143,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$143,000	$143,000	$143,000	Not a member
$39.37 per resident (192nd of 351)	$39.37 per resident (205th of 351)	$39.37 per resident (208th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2023. Every one names Sunderland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"parks and playgrounds in the town of Sunderland"	Enacted names the town
FY2023	$33,000 (split three ways)	"the town of Deerfield for improvements to the regional senior center in the town that serves the towns of Deerfield, Sunderland and Whately"	Enacted names the town
FY2018	$10,000	"the Sunderland 300 anniversary"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sunderland received 2.35 times its proportional share of competitive grant awards.

Local road miles **37.7** 302nd of 351 · 10.4 per 1,000 residents (103rd of 351)	Town-owned bridges, replacement cost **$139,000** scored exposure $36,000 · none in poor condition	Road-stream crossings **56** 240th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **14.2 sq mi** 21% state-owned	Seasonal homes **3%** share of housing units	Peak service population **3,745** residents plus seasonal	Core infrastructure index **2.45** roads, culverts, dams, coast, flood, energy

Burden index 2.35; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,027 acres** 22.3% of land area · FY2026	State-owned land PILOT, FY2026 **$259,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$128** statewide $117 · FY2026	New growth per resident **$20,765** FY2017–2025 · 175th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 19.1% of Sunderland's general-fund spending in FY2025, down from 32.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **32.9%** $2.2M of $6.6M · median town 14.1%	FY2016 **25.4%** $1.8M of $7.1M · median town 12.2%	FY2025 **19.1%** $2.1M of $11M · median town 11.5%	Net of state charges, FY2025 **16.9%** FY2010: 22.3% · median town 10.0%

Sunderland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $812,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sunderland's state aid did not keep pace with either price measure: FY2025 aid was 37.5% below its FY2006 aid grown by Boston-area consumer prices and 44.4% below grown by the government price index.

Gross state aid went from $2.2 million in FY2006 to $2.1 million in FY2025, −3.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+216.6%** $174,000 to $550,000 · all towns +54.0%	All fixed costs, FY2016–25 **+135.7%** $526,000 to $1.2M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sunderland's health insurance would have been $217,000 in FY2025; it was $550,000, $333,000 above the path. Its fixed costs would have been $657,000 in FY2025; it was $1.24 million, $583,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+37%), FY2018 (+36%) and FY2023 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sunderland came to $143,000, 38.1% of the $376,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$143,000	38.1%	28.2%
Placed in the town	$143,000	38.1%	42.3%
Everything placed	$143,000	38.1%	45.2%

SCHOOLS

Sunderland's required school contribution is 2.9% of median household income, 93rd highest of 351.

Chapter 70 aid, FY2026 **$1.8M** to the town's district	Required local contribution **$3.4M** FY2026
Share of household income **2.9%** 93rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

Sunderland runs its own district for some grades and belongs to Frontier and Franklin County for others; Sunderland accounts for 27% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Sunderland received $2.9 million in earmarks placed in the town and competitive grants over ten years, 65% of the $4.4 million its size, need and institutions predict.

PEERS

Sunderland ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sunderland this town	**38**	**$9,413**	**$417**	**$39.37**	**2.35**	**2.9%**
North Brookfield peer	56	$15,678	$1,128	$7.35	0.87	2.9%
Shelburne peer · best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
West Brookfield peer	56	$14,082	$1,069	$66.08	1.84	2.6%
Buckland peer	59	$14,272	$4,838	$55.26	6.12	2.3%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Sutton

Town · Worcester County · 9,452 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
18th Worcester · Joseph D. McKenna

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Sutton Public Schools, the town's own district
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Sutton scores 44 on the Fairness Index for all state aid and 78 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

168th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
43	54	39	41

Rank under other weightings: 154th to 188th.

Weighting-dependent: the range crosses the 45–55 band

Sutton received less than its share of state aid on three of four measures; its blended score of 44 stays between 42 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

78 / 100

80th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
78	84	76	76

Rank under other weightings: 76th to 85th.

Stable high: above 55 under every weighting

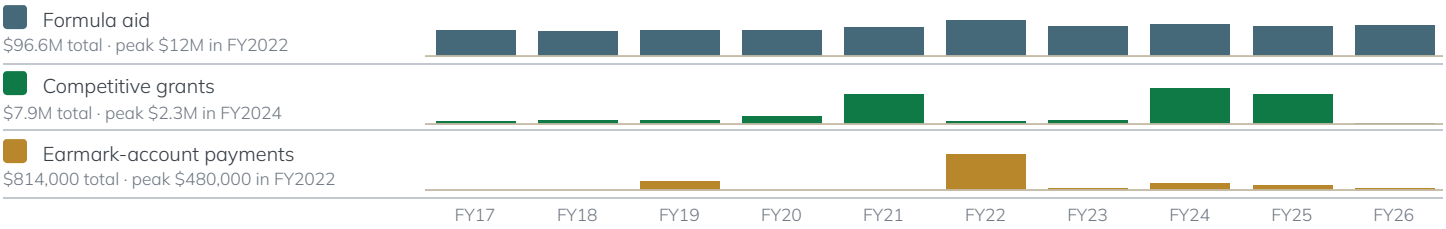
Sutton received more than its share of discretionary money on all four measures; its blended score of 78 stays between 77 and 80 under every weighting tested.

STATE MONEY, FY2017–FY2026

Sutton's town government and school districts received $96.6 million in formula aid and $7.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$96.6M	**$7.9M**	**$814,000**
$10,223 per resident (171st of 351) · gross	$840 per resident (91st of 351)	$86.12 per resident (32nd of 351)

Competitive grants to Sutton peaked in FY2024 at $2.3 million, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.9 million, are not shown.

EARMARKS

Sutton received $1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1M	**$1M**	**$1M**	**Not a member**
$107 per resident (40th of 351)	$107 per resident (61st of 351)	$107 per resident (66th of 351)	35 municipalities had none

Placed in the town: 16 clauses in nine of ten budgets; the most recent in FY2026. Every one names Sutton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$250,000	"the town of Sutton for facilitating compliance with the Americans with Disabilities Act at Nathan's Barn at Waters Farm"	Enacted names the town
FY2022	$175,000	"Waters farm in the town of Sutton for phase 2 capital improvements for Nathan's Barn"	Enacted names the town
FY2019	$125,000	"the purchase of public safety communications equipment in the town of Sutton"	Enacted names the town
FY2020	$80,000	"the Sutton Historical Society, Inc. to repair and renovate the Sutton Meetinghouse in the town of Sutton"	Enacted names the town
FY2025	$70,000	"the town of Sutton for safety and security upgrades at Sutton public schools"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Sutton received 1.91 times its proportional share of competitive grant awards.

Local road miles **94.8** 107th of 351 · 10.0 per 1,000 residents (108th of 351)	Town-owned bridges, replacement cost **$13.8M** scored exposure $5.3M · 2.5 in poor condition	Road-stream crossings **179** 21st of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **32.4 sq mi** 11% state-owned	Seasonal homes **2%** share of housing units	Peak service population **9,674** residents plus seasonal	Core infrastructure index **1.07** roads, culverts, dams, coast, flood, energy

Burden index 1.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,279 acres** 11.0% of land area · FY2026	State-owned land PILOT, FY2026 **$260,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$114** statewide $117 · FY2026	New growth per resident **$33,171** FY2017–2025 · 90th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 18.5% of Sutton's general-fund spending in FY2025, down from 32.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **32.1%** $7.2M of $22.3M · median town 14.1%	FY2016 **21.5%** $6.5M of $30.2M · median town 12.2%	FY2025 **18.5%** $7.5M of $40.6M · median town 11.5%	Net of state charges, FY2025 **17.5%** FY2010: 21.0% · median town 10.0%

Sutton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $367,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Sutton's state aid did not keep pace with either price measure: FY2025 aid was 32.5% below its FY2006 aid grown by Boston-area consumer prices and 40.0% below grown by the government price index.

Gross state aid went from $7.2 million in FY2006 to $7.5 million in FY2025, +4.7% in dollars. Flag: in FY2010, $1.1 million of Sutton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+43.4%** $2.4M to $3.5M · all towns +54.0%	All fixed costs, FY2016–25 **+67.9%** $3.6M to $6.1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Sutton's health insurance would have been $3.06 million in FY2025; it was $3.51 million, $453,000 above the path. Its fixed costs would have been $4.52 million in FY2025; it was $6.08 million, $1.56 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Sutton came to $1 million, 95.1% of the $1.06 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1M	95.1%	28.2%
Placed in the town	$1M	95.1%	42.3%
Everything placed	$1M	95.1%	45.2%

SCHOOLS

Sutton's required school contribution is 3.1% of median household income, 56th highest of 351.

Chapter 70 aid, FY2026 **$6.3M** to the town's district	Required local contribution **$15.4M** FY2026
Share of household income **3.1%** 56th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Sutton runs its own school district and also belongs to Blackstone Valley; Sutton accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Sutton received $9 million in earmarks placed in the town and competitive grants over ten years, 2.0 times the $4.4 million its size, need and institutions predict.

PEERS

Sutton ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Sutton this town	**44**	**$10,223**	**$840**	**$107**	**1.91**	**3.1%**
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Millis peer	39	$9,221	$150	$151	0.75	2.6%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Wrentham peer	39	$9,318	$289	$48.99	0.85	3.0%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Swampscott

Town · Essex County · 15,277 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Essex · Jennifer Balinsky Armini

STATE SENATE

Third Essex · Brendan P. Crighton

SCHOOL DISTRICTS

Swampscott Public Schools, the town's own district

Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Swampscott scores 28 on the Fairness Index for all state aid and 32 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

324th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	36	26	25

Rank under other weightings: 316th to 330th.

Stable low: below 45 under every weighting

Swampscott received less than its share of state aid on all four measures; its blended score of 28 stays between 27 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

32 / 100

260th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	37	37	26

Rank under other weightings: 249th to 265th.

Stable low: below 45 under every weighting

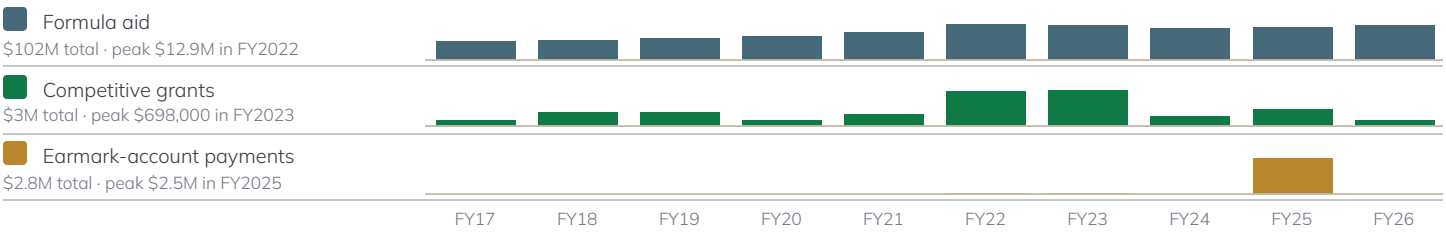
Swampscott received less than its share of discretionary money on all four measures; its blended score of 32 stays between 29 and 35 under every weighting tested.

STATE MONEY, FY2017–FY2026

Swampscott's town government and school districts received $102 million in formula aid and $3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$102M	**$3M**	**$2.8M**
$6,662 per resident (307th of 351) · gross	$197 per resident (253rd of 351)	$180 per resident (7th of 351)

Competitive grants to Swampscott peaked in FY2023 at $698,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $10 million, are not shown.

EARMARKS

Swampscott received $552,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$552,000	**$552,000**	**$552,000**	**Not a member**
$36.11 per resident (205th of 351)	$36.11 per resident (218th of 351)	$36.11 per resident (221st of 351)	35 municipalities had none

Placed in the town: 12 clauses in seven of ten budgets; the most recent in FY2026. Every one names Swampscott directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$100,000	"the town of Swampscott to create a racial equity municipal action plan"	Enacted names the town
FY2020	$100,000	"property damage repairs to the Town Pier and Historic Fish House and to support efforts for a more resilient and safer waterfront in Swampscott"	Enacted names the town
FY2024	$65,000	"the town of Swampscott for design improvements to street signs around Hadley elementary school to increase pedestrian safety"	Enacted names the town
FY2023	$50,000	"the planning and design of renovations and improvements to open spaces in the town of Swampscott"	Enacted names the town
FY2022	$50,000	"the town of Swampscott to assist with the fulfilment of studies, plans and projects outlined within the town's harbor and waterfront plan"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Swampscott received 1.27 times its proportional share of competitive grant awards.

Local road miles **42.9** 278th of 351 · 2.8 per 1,000 residents (323rd of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **7** 340th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **3.0 sq mi** 0% state-owned	Seasonal homes **4%** share of housing units	Peak service population **15,887** residents plus seasonal	Core infrastructure index **2.65** roads, culverts, dams, coast, flood, energy

Burden index 1.27; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$2,931** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$26,645** statewide $117 · FY2026	New growth per resident **$16,956** FY2017–2025 · 227th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.1% of Swampscott's general-fund spending in FY2025, up from 9.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.4%** $3.8M of $40.9M · median town 14.1%	FY2016 **8.1%** $4.5M of $55.4M · median town 12.2%	FY2025 **10.1%** $7.3M of $72.4M · median town 11.5%	Net of state charges, FY2025 **7.5%** FY2010: 6.6% · median town 10.0%

Swampscott's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $96,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Swampscott's state aid kept pace with both price measures: FY2025 aid was 22.7% above its FY2006 aid grown by Boston-area consumer prices and 9.1% above grown by the government price index.

Gross state aid went from $3.8 million in FY2006 to $7.3 million in FY2025, +90.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.6%** $4.9M to $7.1M · all towns +54.0%	All fixed costs, FY2016–25 **+42.3%** $10.3M to $14.7M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Swampscott's health insurance would have been $6.16 million in FY2025; it was $7.13 million, $973,000 above the path. Its fixed costs would have been $12.9 million in FY2025; it was $14.7 million, $1.80 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Swampscott came to $483,000, 22.0% of the $2.20 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$483,000	22.0%	28.2%
Placed in the town	$483,000	22.0%	42.3%
Everything placed	$483,000	22.0%	45.2%

SCHOOLS

Swampscott's required school contribution is 2.8% of median household income, 138th highest of 351.

Chapter 70 aid, FY2026 **$5.9M** to the town's district	Required local contribution **$22.9M** FY2026
Share of household income **2.8%** 138th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+31%** after inflation

Swampscott runs its own school district and also belongs to Essex North Shore; Swampscott accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Swampscott received $3.8 million in earmarks placed in the town and competitive grants over ten years, 89% of the $4.3 million its size, need and institutions predict.

PEERS

Swampscott ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Swampscott this town	**28**	**$6,662**	**$197**	**$36.11**	**1.27**	**2.8%**
Harwich peer · lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%
Dedham peer	28	$6,510	$161	$81.43	0.48	2.4%
Ipswich peer	28	$6,449	$237	$49.75	0.55	2.3%
Lynnfield peer · best in class of 30	30	$7,167	$206	$147	0.81	3.0%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Swansea

Town · Bristol County · 17,359 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

5th Bristol · Justin Thurber 60% of residents
4th Bristol · Steven S. Howitt 40% of residents

Swansea is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS

Swansea Public Schools, the town's own district
Greater Fall River Regional Vocational Technical School District, vocational, shared with Fall River, Somerset and Westport

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Swansea scores 40 on the Fairness Index for all state aid and 65 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

211th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	47	39	37

Rank under other weightings: 205th to 222nd.

Stable low: below 45 under every weighting

Swansea received less than its share of state aid on all four measures; its blended score of 40 stays between 39 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

65 / 100

125th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	71	64	62

Rank under other weightings: 121st to 129th.

Stable high: above 55 under every weighting

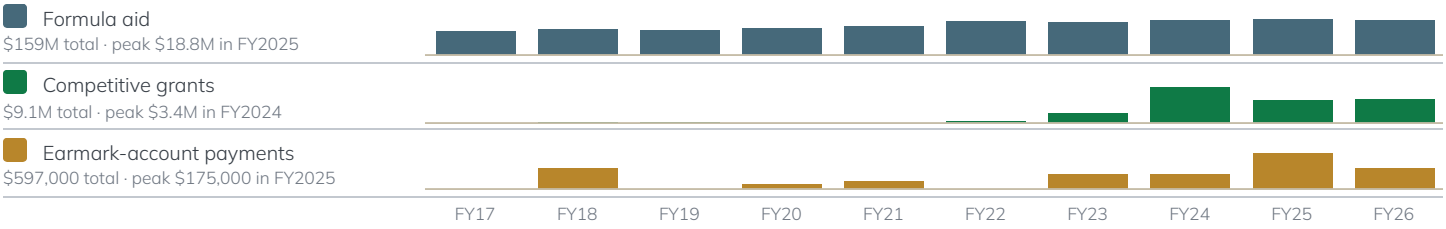
Swansea received more than its share of discretionary money on all four measures; its blended score of 65 stays between 63 and 66 under every weighting tested.

STATE MONEY, FY2017–FY2026

Swansea's town government and school districts received $159 million in formula aid and $9.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$159M	**$9.1M**	**$597,000**
$9,140 per resident (214th of 351) · gross	$526 per resident (133rd of 351)	$34.37 per resident (135th of 351)

Competitive grants to Swansea peaked in FY2024 at $3.4 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.2 million, are not shown.

EARMARKS

Swansea received $1.2 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.2M	**$1.2M**	**$1.2M**	**Not a member**
$72.01 per resident (82nd of 351)	$72.01 per resident (109th of 351)	$72.01 per resident (118th of 351)	35 municipalities had none

Placed in the town: 16 clauses in seven of ten budgets; the most recent in FY2026. Every one names Swansea directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$200,000	"the purpose of the Swansea sewer infrastructure project"	Enacted names the town
FY2024	$150,000	"the town of Swansea to construct an Americans with Disabilities Act-compliant and architectural access board-compliant sidewalk along the north side..."	Enacted names the town
FY2025	$100,000	"the town of Swansea to be applied toward the upgrades and repairs of the crossing at Sharps lot road and Lewin brook"	Enacted names the town
FY2018	$100,000	"the Swansea beach revitalization project"	Enacted names the town
FY2018	$100,000	"the commemoration of the town of Swansea's 350th Anniversary Celebration"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Swansea received 1.42 times its proportional share of competitive grant awards.

Local road miles **103.3** 84th of 351 · 6.0 per 1,000 residents (192nd of 351)	Town-owned bridges, replacement cost **$10.4M** scored exposure $1.2M · none in poor condition	Road-stream crossings **100** 116th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **22.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **17,359** residents plus seasonal	Core infrastructure index **0.41** roads, culverts, dams, coast, flood, energy

Burden index 1.42; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$20,522** FY2017–2025 · 177th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 24.0% of Swansea's general-fund spending in FY2025, the same share as in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.0%** $6.7M of $27.7M · median town 14.1%	FY2016 **23.1%** $9.1M of $39.5M · median town 12.2%	FY2025 **24.0%** $13.7M of $57M · median town 11.5%	Net of state charges, FY2025 **22.2%** FY2010: 21.1% · median town 10.0%

Swansea's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Swansea's state aid kept pace with both price measures: FY2025 aid was 32.6% above its FY2006 aid grown by Boston-area consumer prices and 17.8% above grown by the government price index.

Gross state aid went from $6.7 million in FY2006 to $13.7 million in FY2025, +105.6% in dollars. Flag: in FY2010, $295,000 of Swansea's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.1%** $5M to $7.3M · all towns +54.0%	All fixed costs, FY2016–25 **+50.1%** $7.7M to $11.6M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Swansea's health insurance would have been $6.26 million in FY2025; it was $7.28 million, $1.01 million above the path. Its fixed costs would have been $9.65 million in FY2025; it was $11.6 million, $1.95 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Swansea came to $1.1 million, 50.8% of the $2.26 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	50.8%	28.2%
Placed in the town	$1.1M	50.8%	42.3%
Everything placed	$1.1M	50.8%	45.2%

SCHOOLS

Swansea's required school contribution is 2.6% of median household income, 183rd highest of 351.

Chapter 70 aid, FY2026 **$12.7M** to the town's district	Required local contribution **$20.7M** FY2026
Share of household income **2.6%** 183rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+15%** after inflation

Swansea runs its own school district and also belongs to Greater Fall River and Bristol County; Swansea accounts for 10% and 6% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Swansea received $10.5 million in earmarks placed in the town and competitive grants over ten years, 2.6 times the $4 million its size, need and institutions predict.

PEERS

Swansea ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Swansea this town	**40**	**$9,140**	**$526**	**$72.01**	**1.42**	**2.6%**
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Uxbridge peer	48	$11,199	$436	$15.55	1.22	2.8%
Norton peer	44	$10,594	$69.10	$29.56	0.74	3.1%
East Bridgewater peer	48	$11,873	$303	$82.76	1.19	2.4%
Mansfield peer	46	$11,457	$163	$30.37	0.28	3.4%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%
Berkley lowest in class of 30	51	$12,903	$95.35	$13.91	0.18	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Taunton

City · Bristol County · 60,433 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

3rd Bristol · Lisa Field and Carol A. Doherty (until February 2025) 62% of residents
12th Bristol · Norman J. Orrall 24% of residents
5th Bristol · Justin Thurber 13% of residents

Taunton is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS

Taunton Public Schools, the city's own district
Bristol-Plymouth Regional Vocational Technical School District, vocational, shared with Berkley, Bridgewater, Dighton, Freetown, Middleborough, Raynham and Rehoboth

REGIONAL PLANNING AGENCY

Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Taunton scores 59 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

47th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
62	52	58	65

Rank under other weightings: 42nd to 62nd.

Stable high: above 55 under every weighting

Taunton received more than its share of state aid on all four measures; its blended score of 59 stays between 57 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

289th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	18	28	28

Rank under other weightings: 272nd to 304th.

Stable low: below 45 under every weighting

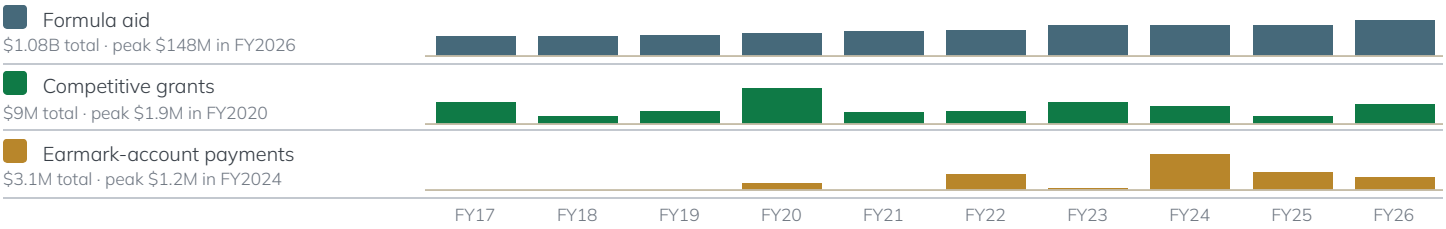
Taunton received less than its share of discretionary money on all four measures; its blended score of 25 stays between 23 and 27 under every weighting tested.

STATE MONEY, FY2017–FY2026

Taunton's town government and school districts received $1.08 billion in formula aid and $9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$1.08B	**$9M**	**$3.1M**
$17,881 per resident (43rd of 351) · gross	$149 per resident (291st of 351)	$52.03 per resident (76th of 351)

Competitive grants to Taunton peaked in FY2020 at $1.9 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $39 million, are not shown.

EARMARKS

Taunton received $4.1 million in local earmarks naming the town, $5.7 million placed in the town and $6.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$4.1M	**$5.7M**	**$6.5M**	**Not a member**
$67.86 per resident (91st of 351)	$94.33 per resident (78th of 351)	$107 per resident (67th of 351)	35 municipalities had none

Placed in the town: 46 clauses in ten of ten budgets; the most recent in FY2026. $3.4 million came in clauses that name Taunton; the other $2.3 million went to organizations based in Taunton, some of which serve a wider area.

Names the town includes $750,000 in clauses that name Taunton but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $750,000 in two clauses for state facilities located in Taunton (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$500,000	"upgrades to the existing central fire station located at 50 School street for its continued use for firefighting services with at least 1 fire truck..."	Enacted names the town
FY2022	$500,000	"the school system of the city of Taunton for the development of a curriculum-based Education Corps to address learning loss"	Enacted names the town
FY2023	$300,000	"Project Newborns Exposed to Substances: Support and Therapy"	Enacted recipient based here
FY2017	$275,000	"the education and training collaborative established in section 9 of chapter 419 of the acts of 2008 for the operation of the life sciences..."	Enacted names the town
FY2023	$250,000	"as a grant to the Southeastern Regional Planning and Economic Development District to support the management of the Assawompset pond complex and..."	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Taunton received 82% of its proportional share of competitive grant awards.

Local road miles **208.1** 13th of 351 · 3.4 per 1,000 residents (302nd of 351)	Town-owned bridges, replacement cost **$53.1M** scored exposure $16.7M · 2.5 in poor condition	Road-stream crossings **174** 25th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **46.7 sq mi** 11% state-owned	Seasonal homes **0%** share of housing units	Peak service population **60,465** residents plus seasonal	Core infrastructure index **0.18** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,011 acres** 10.1% of land area · FY2026	State-owned land PILOT, FY2026 **$312,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$104** statewide $117 · FY2026	New growth per resident **$15,155** FY2017–2025 · 252nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 39.4% of Taunton's general-fund spending in FY2025, up from 35.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **35.3%** $54.6M of $155M · median town 14.1%	FY2016 **36.1%** $64.3M of $178M · median town 12.2%	FY2025 **39.4%** $108M of $274M · median town 11.5%	Net of state charges, FY2025 **37.2%** FY2010: 35.1% · median town 10.0%

Taunton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $8.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Taunton's state aid kept pace with both price measures: FY2025 aid was 27.2% above its FY2006 aid grown by Boston-area consumer prices and 13.1% above grown by the government price index.

Gross state aid went from $54.6 million in FY2006 to $108 million in FY2025, +97.3% in dollars. Flag: in FY2010, $3.1 million of Taunton's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+24.9%** $28.3M to $35.3M · all towns +54.0%	All fixed costs, FY2016–25 **+32.6%** $46.2M to $61.2M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Taunton's health insurance would have been $35.3 million in FY2025; it was $35.3 million, $7,628 below the path. Its fixed costs would have been $57.7 million in FY2025; it was $61.2 million, $3.54 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Taunton came to $4.1 million, 58.3% of the $7.03 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.1M	58.3%	28.2%
Placed in the town	$5.4M	76.8%	42.3%
Everything placed	$6.2M	87.4%	45.2%

SCHOOLS

Taunton's required school contribution is 2.7% of median household income, 156th highest of 351.

Chapter 70 aid, FY2026 **$113M** to the town's district	Required local contribution **$51.6M** FY2026
Share of household income **2.7%** 156th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+31%** after inflation

Taunton runs its own school district and also belongs to Bristol Plymouth and Bristol County; Taunton accounts for 36% and 9% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Taunton received $16.4 million in earmarks placed in the town and competitive grants over ten years, 65% of the $25.2 million its size, need and institutions predict.

PEERS

Taunton ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Taunton this town	**59**	**$17,881**	**$149**	**$94.33**	**0.82**	**2.7%**
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Leominster peer	58	$16,497	$382	$54.84	1.58	2.5%
Westfield peer	52	$14,111	$235	$64.11	0.63	2.6%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Pittsfield peer	59	$17,230	$454	$131	1.56	2.6%
Springfield best in class of 30	79	$35,424	$352	$178	1.27	1.8%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Templeton

Town · Worcester County · 8,252 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Worcester · Jonathan D. Zlotnik

STATE SENATE
Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS
Narragansett Regional School District, shared with Phillipston
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY
Montachusett Regional Planning Commission

FAIRNESS INDEX

Templeton scores 61 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

61 / 100

42nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	56	58	66

Rank under other weightings: 35th to 50th.

Stable high: above 55 under every weighting

Templeton received more than its share of state aid on all four measures; its blended score of 61 stays between 58 and 63 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

175th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	43	57	55

Rank under other weightings: 161st to 189th.

Near fair: between 45 and 55 under every weighting

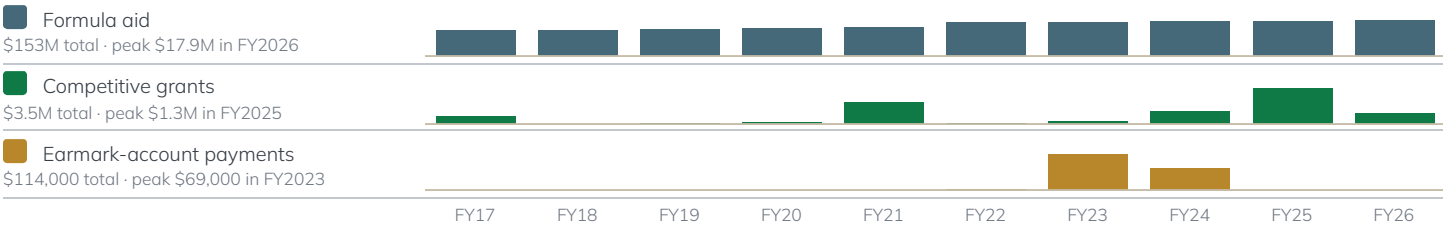
Templeton received more than its share of discretionary money on three of four measures; its blended score of 52 stays between 49 and 54 under every weighting tested.

STATE MONEY, FY2017–FY2026

Templeton's town government and school districts received $153 million in formula aid and $3.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$153M	$3.5M	$114,000
$18,577 per resident (41st of 351) · gross	$420 per resident (160th of 351)	$13.77 per resident (236th of 351)

Competitive grants to Templeton peaked in FY2025 at $1.3 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.3 million, are not shown.

EARMARKS

Templeton received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	$225,000	$225,000	Not a member
$27.27 per resident (240th of 351)	$27.27 per resident (252nd of 351)	$27.27 per resident (253rd of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2020. Every one names Templeton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$225,000	"improvements to the police department of the town of Templeton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Templeton received 60% of its proportional share of competitive grant awards.

Local road miles **75.7** 172nd of 351 · 9.2 per 1,000 residents (118th of 351)	Town-owned bridges, replacement cost **$10.2M** scored exposure $6.9M · four in poor condition	Road-stream crossings **95** 128th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **31.9 sq mi** 16% state-owned	Seasonal homes **3%** share of housing units	Peak service population **8,546** residents plus seasonal	Core infrastructure index **0.18** roads, culverts, dams, coast, flood, energy

Burden index 0.60; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,662 acres** 13.0% of land area · FY2026	State-owned land PILOT, FY2026 **$163,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$61.30** statewide $117 · FY2026	New growth per resident **$10,369** FY2017–2025 · 315th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.9% of Templeton's general-fund spending in FY2025, down from 14.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.1%** $1.4M of $9.8M · median town 14.1%	FY2016 **11.5%** $1.5M of $13.2M · median town 12.2%	FY2025 **9.9%** $2M of $20.4M · median town 11.5%	Net of state charges, FY2025 **9.6%** FY2010: 12.0% · median town 10.0%

Templeton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $12.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Templeton's state aid did not keep pace with either price measure: FY2025 aid was 5.7% below its FY2006 aid grown by Boston-area consumer prices and 16.2% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $2 million in FY2025, +46.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+14.6%** $1.1M to $1.2M · all towns +54.0%	All fixed costs, FY2016–25 **+53.5%** $1.9M to $2.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Templeton's health insurance would have been $1.32 million in FY2025; it was $1.21 million, $109,000 below the path. Its fixed costs would have been $2.39 million in FY2025; it was $2.93 million, $547,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Templeton came to $225,000, 145.6% of the $155,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$225,000	145.6%	28.2%
Placed in the town	$225,000	145.6%	42.3%
Everything placed	$225,000	145.6%	45.2%

SCHOOLS

Templeton's required school contribution is 2.0% of median household income, 310th highest of 351.

Chapter 70 aid, FY2026 **$12.7M** attributed to the town	Required local contribution **$6.5M** FY2026
Share of household income **2.0%** 310th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–5%** after inflation

EXPECTED AND ACTUAL

Templeton received $3.7 million in earmarks placed in the town and competitive grants over ten years, 70% of the $5.3 million its size, need and institutions predict.

Templeton has no school district of its own. Its pupils attend Templeton, Narragansett and Montachusett; Templeton accounts for 100%, 85% and 6% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Templeton ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Templeton this town	**61**	**$18,577**	**$420**	**$27.27**	**0.60**	**2.0%**
Palmer peer	58	$16,159	$720	$29.88	0.54	2.2%
Montague peer	55	$14,528	$1,282	$26.53	2.38	2.7%
Dalton peer	58	$17,590	$490	$27.97	1.32	2.7%
Spencer peer	59	$16,090	$675	$55.46	0.85	2.5%
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Ludlow best in class of 30	42	$10,596	$407	$132	1.85	2.8%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Tewksbury

Town · Middlesex County · 31,273 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

19th Middlesex · David Allen Robertson 60% of residents
18th Essex · Tram T. Nguyen 27% of residents
17th Middlesex · Vanna Howard (until taking the First Middlesex Senate seat in March 2026; seat vacant) 12% of residents

Tewksbury is split among three House districts. Shares are of 2020 residents.

STATE SENATE

Second Essex and Middlesex · Barry R. Finegold

SCHOOL DISTRICTS

Tewksbury Public Schools, the town's own district
Shawsheen Valley Regional Vocational Technical School District, vocational, shared with Bedford, Billerica, Burlington and Wilmington

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Tewksbury scores 38 on the Fairness Index for all state aid and 31 for discretionary money. Fifty is a fair share.

ALL STATE AID

38 / 100

239th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	48	39	30

Rank under other weightings: 221st to 243rd.

Stable low: below 45 under every weighting

Tewksbury received less than its share of state aid on all four measures; its blended score of 38 stays between 35 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

31 / 100

265th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	40	33	24

Rank under other weightings: 255th to 268th.

Stable low: below 45 under every weighting

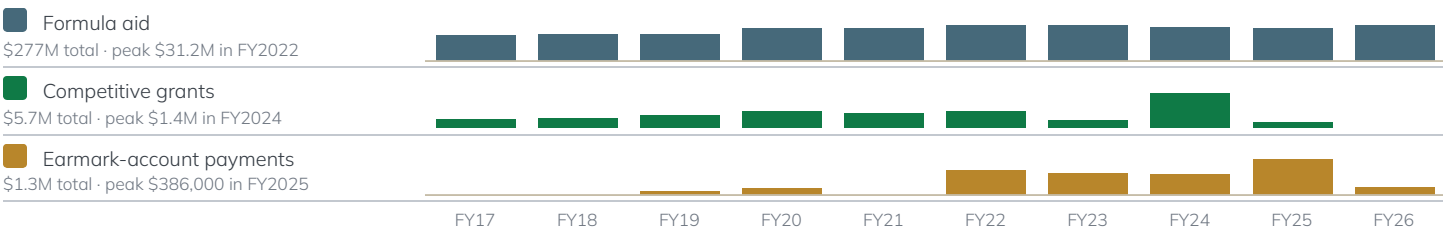
Tewksbury received less than its share of discretionary money on all four measures; its blended score of 31 stays between 28 and 34 under every weighting tested.

STATE MONEY, FY2017–FY2026

Tewksbury's town government and school districts received $277 million in formula aid and $5.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$277M	$5.7M	$1.3M
$8,861 per resident (224th of 351) · gross	$181 per resident (265th of 351)	$42.14 per resident (102nd of 351)

Competitive grants to Tewksbury peaked in FY2024 at $1.4 million, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $28.2 million, are not shown.

EARMARKS

Tewksbury received $1.9 million in local earmarks naming the town, $1.8 million placed in the town and $1.9 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$1.9M	$1.8M	$1.9M	Not a member
$59.49 per resident (118th of 351)	$57.89 per resident (144th of 351)	$59.49 per resident (147th of 351)	35 municipalities had none

Placed in the town: 30 clauses in ten of ten budgets; the most recent in FY2026. Every one names Tewksbury directly.

Names the town includes $50,000 in clauses that name Tewksbury but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $50,000 in one clause for state facilities located in Tewksbury (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2018	$200,000	"emergency repairs by the school department in the town of Tewksbury to the North Street elementary school"	Enacted names the town
FY2019	$150,000	"the construction of bathroom facilities at Frasca field in Tewksbury"	Enacted names the town
FY2024	$100,000	"the survey, redesign and reconstruction of route 38 in the town of Tewksbury"	Enacted names the town
FY2023	$100,000	"the town of Tewksbury for a police radio system to replace old equipment that cannot be fixed and requires a full replacement"	Enacted names the town
FY2023	$90,000	"the town of Tewksbury for services provided by the police department to the Tewksbury State Hospital"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Tewksbury received 24% of its proportional share of competitive grant awards.

Local road miles **144.2** 37th of 351 · 4.6 per 1,000 residents (257th of 351)	Town-owned bridges, replacement cost **$5.3M** scored exposure $1.1M · none in poor condition	Road-stream crossings **107** 105th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.7 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **31,380** residents plus seasonal	Core infrastructure index **0.91** roads, culverts, dams, coast, flood, energy

Burden index 0.24; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **614 acres** 4.6% of land area · FY2026	State-owned land PILOT, FY2026 **$392,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$638** statewide $117 · FY2026	New growth per resident **$24,758** FY2017–2025 · 141st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.9% of Tewksbury's general-fund spending in FY2025, down from 22.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **22.8%** $16.4M of $71.9M · median town 14.1%	FY2016 **15.7%** $16.2M of $103M · median town 12.2%	FY2025 **11.9%** $18.5M of $156M · median town 11.5%	Net of state charges, FY2025 **10.8%** FY2010: 19.1% · median town 10.0%

Tewksbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Tewksbury's state aid did not keep pace with either price measure: FY2025 aid was 27.1% below its FY2006 aid grown by Boston-area consumer prices and 35.2% below grown by the government price index.

Gross state aid went from $16.4 million in FY2006 to $18.5 million in FY2025, +13.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.0%** $15.8M to $22.9M · all towns +54.0%	All fixed costs, FY2016–25 **+55.4%** $23.2M to $36.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Tewksbury's health insurance would have been $19.7 million in FY2025; it was $22.9 million, $3.18 million above the path. Its fixed costs would have been $29 million in FY2025; it was $36.1 million, $7.08 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Tewksbury came to $1.7 million, 23.5% of the $7.11 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.7M	23.5%	28.2%
Placed in the town	$1.6M	22.8%	42.3%
Everything placed	$1.7M	23.5%	45.2%

SCHOOLS

Tewksbury's required school contribution is 2.8% of median household income, 134th highest of 351.

Chapter 70 aid, FY2026 **$16.6M** to the town's district	Required local contribution **$41.6M** FY2026
Share of household income **2.8%** 134th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Tewksbury runs its own school district and also belongs to Shawsheen Valley; Tewksbury accounts for 28% of that district's foundation budget.

EXPECTED AND ACTUAL

Tewksbury received $7.8 million in earmarks placed in the town and competitive grants over ten years, about the $7.5 million its size, need and institutions predict.

PEERS

Tewksbury ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Tewksbury this town	**38**	**$8,861**	**$181**	**$57.89**	**0.24**	**2.8%**
Shrewsbury peer	36	$8,418	$158	$25.41	0.74	3.1%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Franklin peer	49	$12,355	$201	$73.18	0.69	3.1%
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Mansfield peer	46	$11,457	$163	$30.37	0.28	3.4%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

Tisbury

Town · Dukes County · 4,893 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Tisbury Public Schools, the town's own district

Martha's Vineyard Regional School District, shared with Aquinnah, Chilmark, Edgartown, Oak Bluffs and West Tisbury

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

Tisbury scores 27 on the Fairness Index for all state aid and 44 for discretionary money. Fifty is a fair share.

ALL STATE AID

27 / 100

337th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
29	31	32	15

Rank under other weightings: 312th to 345th.

Stable low: below 45 under every weighting

Tisbury received less than its share of state aid on all four measures; its blended score of 27 stays between 24 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

44 / 100

206th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	54	42	31

Rank under other weightings: 185th to 217th.

Weighting-dependent: the range crosses the 45–55 band

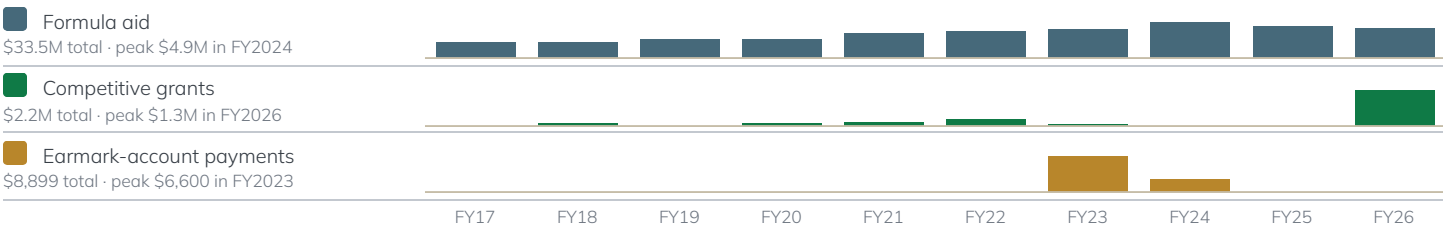
Tisbury received less than its share of discretionary money on two of four measures; its blended score of 44 stays between 40 and 49 under every weighting tested.

STATE MONEY, FY2017–FY2026

Tisbury's town government and school districts received $33.5 million in formula aid and $2.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$33.5M	$2.2M	$8,899
$6,847 per resident (297th of 351) · gross	$443 per resident (153rd of 351)	$1.82 per resident (315th of 351)

Competitive grants to Tisbury peaked in FY2026 at $1.3 million, 61% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.1 million, are not shown.

EARMARKS

No local earmark was placed in Tisbury in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $8,899 in payments to Tisbury's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Tisbury.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Tisbury's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Lenox	$75,000	$75,000	$75,000	$14.77
Rockport	$671,000	$621,000	$671,000	$88.56
Orleans	$12,000	$737,000	$737,000	$115
Chatham	$0	$1.6M	$1.6M	$246
Nahant	$2.3M	$453,000	$2.3M	$136

WHAT THE TOWN CARRIES

Measured against what it maintains, Tisbury received 1.19 times its proportional share of competitive grant awards.

Local road miles **21.5** 337th of 351 · 4.4 per 1,000 residents (265th of 351)	Town-owned bridges, replacement cost **$325,000** scored exposure $84,000 · none in poor condition	Road-stream crossings **4** 343rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **6.5 sq mi** 0% state-owned	Seasonal homes **39%** share of housing units	Peak service population **8,289** residents plus seasonal	Core infrastructure index **2.18** roads, culverts, dams, coast, flood, energy

Burden index 1.19; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **13 acres** 0.3% of land area · FY2026	State-owned land PILOT, FY2026 **$25,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,969** statewide $117 · FY2026	New growth per resident **$66,260** FY2017–2025 · 20th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.8% of Tisbury's general-fund spending in FY2025, down from 5.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.4%** $908,000 of $16.8M · median town 14.1%	FY2016 **3.9%** $953,000 of $24.4M · median town 12.2%	FY2025 **4.8%** $2M of $42M · median town 11.5%	Net of state charges, FY2025 **0.5%** FY2010: -1.2% · median town 10.0%

Tisbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $861,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Tisbury's state aid kept pace with both price measures: FY2025 aid was 42.8% above its FY2006 aid grown by Boston-area consumer prices and 26.9% above grown by the government price index.

Gross state aid went from $908,000 in FY2006 to $2 million in FY2025, +121.5% in dollars. Flag: in FY2010, $180,000 of Tisbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+38.7%** $2.4M to $3.3M · all towns +54.0%	All fixed costs, FY2016–25 **+51.1%** $3.9M to $5.9M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Tisbury's health insurance would have been $2.96 million in FY2025; it was $3.28 million, $326,000 above the path. Its fixed costs would have been $4.86 million in FY2025; it was $5.88 million, $1.02 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Tisbury came to $0, 0.0% of the $915,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Tisbury's required school contribution is 5.5% of median household income, 1st highest of 351.

Chapter 70 aid, FY2026 **$2.5M** to the town's district	Required local contribution **$7.7M** FY2026
Share of household income **5.5%** 1st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Tisbury runs its own district for some grades and belongs to Martha's Vineyard for others; Tisbury accounts for 22% of that district's foundation budget.

EXPECTED AND ACTUAL

Tisbury received $2.9 million in earmarks placed in the town and competitive grants over ten years, 24% of the $12.1 million its size, need and institutions predict.

PEERS

Tisbury is the only municipality, among itself and its ten nearest peers, with no earmarks placed in it in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Tisbury this town	**27**	**$6,847**	**$443**	**$0**	**1.19**	**5.5%**
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Orleans peer	26	$4,954	$820	$115	1.26	1.7%
Chatham peer	23	$4,225	$743	$246	0.70	1.8%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Sheffield lowest in class of 30	47	$9,816	$2,468	$0	1.94	3.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Tolland

Town · Hampden County · 540 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
3rd Hampden · Nicholas A. Boldyga	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Southwick-Tolland-Granville Regional School District**, shared with Granville and Southwick	Pioneer Valley Planning Commission

FAIRNESS INDEX

Tolland scores 55 on the Fairness Index for all state aid and 93 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

85th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	59	44	62

Rank under other weightings: 59th to 105th.

Weighting-dependent: the range crosses the 45–55 band

Tolland received more than its share of state aid on three of four measures; its blended score of 55 stays between 51 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

93 / 100

30th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	83	97

Rank under other weightings: 24th to 37th.

Stable high: above 55 under every weighting

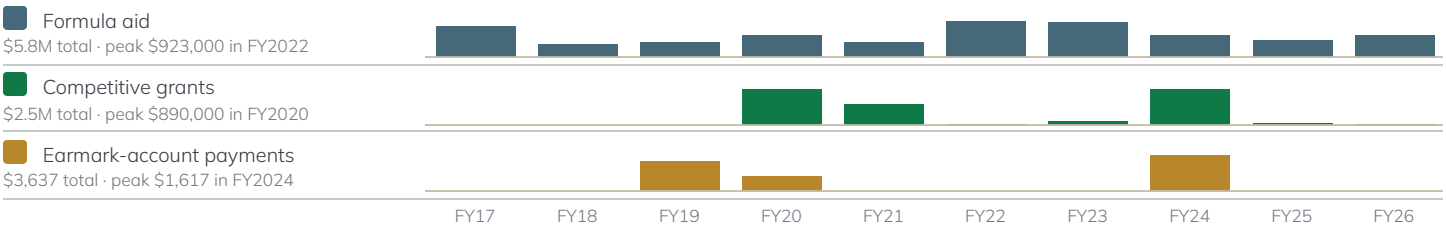
Tolland received more than its share of discretionary money on all four measures; its blended score of 93 stays between 91 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Tolland's town government and school districts received $5.8 million in formula aid and $2.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$5.8M	**$2.5M**	**$3,637**
$10,826 per resident (153rd of 351) · gross	$4,602 per resident (17th of 351)	$6.74 per resident (275th of 351)

Competitive grants to Tolland peaked in FY2020 at $890,000, 36% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 540 residents, a single payment moves Tolland's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $445,000, are not shown.

EARMARKS

Tolland received $6,111 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$6,111	**$6,111**	**$6,111**	**Not a member**
$11.32 per resident (298th of 351)	$11.32 per resident (306th of 351)	$11.32 per resident (307th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2019. Every one names Tolland directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$6,111 (split nine ways)	"equally between the councils on aging located in the municipalities of Agawam, Chicopee, Easthampton, Holyoke. Montgomery, Russell, Southampton..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Tolland received 1.82 times its proportional share of competitive grant

awards.

Local road miles **39.0** 294th of 351 · 72.3 per 1,000 residents (9th of 351)	Town-owned bridges, replacement cost **$1.7M** scored exposure $520,000 · one in poor condition	Road-stream crossings **48** 270th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **31.5 sq mi** 22% state-owned	Seasonal homes **52%** share of housing units	Peak service population **1,173** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 1.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,098 acres** 20.3% of land area · FY2026	State-owned land PILOT, FY2026 **$109,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$26.72** statewide $117 · FY2026	New growth per resident **$36,225** FY2017–2025 · 76th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.8% of Tolland's general-fund spending in FY2025, down from 5.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.9%** $45,000 of $764,000 · median town 14.1%	FY2016 **5.5%** $83,000 of $1.5M · median town 12.2%	FY2025 **5.8%** $138,000 of $2.4M · median town 11.5%	Net of state charges, FY2025 **5.7%** FY2010: 12.5% · median town 10.0%

Tolland's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $175,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Tolland's state aid kept pace with both price measures: FY2025 aid was 97.0% above its FY2006 aid grown by Boston-area consumer prices and 75.1% above grown by the government price index.

Gross state aid went from $45,000 in FY2006 to $138,000 in FY2025, +205.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+23.8%** $42,000 to $51,000 · all towns +54.0%	All fixed costs, FY2016–25 **+47.8%** $150,000 to $222,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Tolland's health insurance would have been $52,000 in FY2025; it was $51,000, $442 below the path. Its fixed costs would have been $187,000 in FY2025; it was $222,000, $34,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2020 (+34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Tolland came to $6,111, 61.8% of the $9,889 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$6,111	61.8%	28.2%
Placed in the town	$6,111	61.8%	42.3%
Everything placed	$6,111	61.8%	45.2%

SCHOOLS

Tolland's required school contribution is 1.1% of median household income, the ninth-lowest of 351.

Chapter 70 aid, FY2026 **$132,000** attributed to the town	Required local contribution **$264,000** FY2026
Share of household income **1.1%** 343rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+21%** after inflation

EXPECTED AND ACTUAL

Tolland received $2.5 million in earmarks placed in the town and competitive grants over ten years, 37% more than the $1.8 million its size, need and institutions predict.

Tolland has no school district of its own. Its pupils attend Southwick Tolland; Tolland accounts for 2% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide. Tolland had 21 resident pupils in FY2026, so per-pupil changes swing from year to year.

PEERS

Tolland ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Tolland this town	**55**	**$10,826**	**$4,602**	**$11.32**	**1.82**	**1.1%**
West Stockbridge peer · lowest in class of 30	43	$9,304	$478	$0	0.46	2.4%
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Topsfield

Town · Essex County · 6,564 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Essex · Kristin E. Kassner 51% of residents
13th Essex · Sally P. Kerans 49% of residents

Topsfield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Topsfield Public Schools, the town's own district
Masconomet Regional School District, shared with Boxford and Middleton
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Topsfield scores 34 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100

273rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	47	30	23

Rank under other weightings: 248th to 293rd.

Stable low: below 45 under every weighting

Topsfield received less than its share of state aid on all four measures; its blended score of 34 stays between 29 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100

277th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	38	25	17

Rank under other weightings: 271st to 290th.

Stable low: below 45 under every weighting

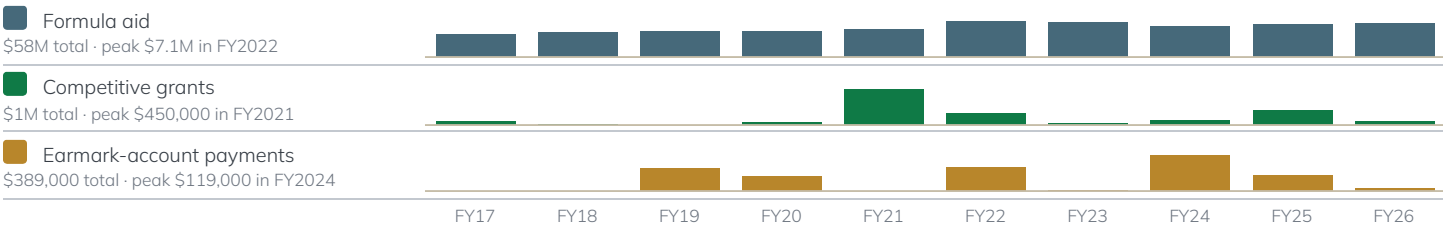
Topsfield received less than its share of discretionary money on all four measures; its blended score of 27 stays between 23 and 31 under every weighting tested.

STATE MONEY, FY2017–FY2026

Topsfield's town government and school districts received $58 million in formula aid and $1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$58M	$1M	$389,000
$8,832 per resident (227th of 351) · gross	$158 per resident (278th of 351)	$59.24 per resident (58th of 351)

Competitive grants to Topsfield peaked in FY2021 at $450,000, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.7 million, are not shown.

EARMARKS

Topsfield received $446,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$446,000	$446,000	$446,000	Not a member
$67.96 per resident (90th of 351)	$67.96 per resident (118th of 351)	$67.96 per resident (125th of 351)	35 municipalities had none

Placed in the town: 14 clauses in seven of ten budgets; the most recent in FY2026. Every one names Topsfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$75,000	"the construction of an elevator in the town hall in the town of Topsfield"	Enacted names the town
FY2024	$50,000	"The Topsfield Historical Society for the installation of an Americans with Disabilities Act compliant parking lot and sidewalk access to 1710 Gould..."	Enacted names the town
FY2022	$50,000	"the linear common or rail trail in the town of Topsfield"	Enacted names the town
FY2020	$50,000	"improvements to Hood pond in the town of Topsfield"	Enacted names the town
FY2026	$35,000	"the acquisition of an autonomous robotic lawnmower in the town of Topsfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Topsfield received about its proportional share of competitive grant awards.

Local road miles **54.6** 232nd of 351 · 8.3 per 1,000 residents (131st of 351)	Town-owned bridges, replacement cost **$7.7M** scored exposure $2.6M · one in poor condition	Road-stream crossings **81** 161st of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **11.9 sq mi** 5% state-owned	Seasonal homes **3%** share of housing units	Peak service population **6,745** residents plus seasonal	Core infrastructure index **1.66** roads, culverts, dams, coast, flood, energy

Burden index 1.04; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **372 acres** 4.9% of land area · FY2026	State-owned land PILOT, FY2026 **$233,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$625** statewide $117 · FY2026	New growth per resident **$13,562** FY2017–2025 · 273rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.2% of Topsfield's general-fund spending in FY2025, down from 11.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.4%** $2M of $17.6M · median town 14.1%	FY2016 **7.4%** $1.8M of $24.6M · median town 12.2%	FY2025 **7.2%** $2.6M of $36M · median town 11.5%	Net of state charges, FY2025 **6.5%** FY2010: 9.8% · median town 10.0%

Topsfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Topsfield's state aid did not keep pace with either price measure: FY2025 aid was 17.4% below its FY2006 aid grown by Boston-area consumer prices and 26.5% below grown by the government price index.

Gross state aid went from $2 million in FY2006 to $2.6 million in FY2025, +28.2% in dollars. Flag: in FY2010, $430,000 of Topsfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.9%** $1.6M to $2.3M · all towns +54.0%	All fixed costs, FY2016–25 **+56.1%** $3M to $4.7M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Topsfield's health insurance would have been $1.94 million in FY2025; it was $2.33 million, $389,000 above the path. Its fixed costs would have been $3.78 million in FY2025; it was $4.72 million, $945,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Topsfield came to $384,000, 49.5% of the $776,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$384,000	49.5%	28.2%
Placed in the town	$384,000	49.5%	42.3%
Everything placed	$384,000	49.5%	45.2%

SCHOOLS

Topsfield's required school contribution is 2.6% of median household income, 176th highest of 351.

Chapter 70 aid, FY2026 **$3.6M** to the town's district	Required local contribution **$11.3M** FY2026
Share of household income **2.6%** 176th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Topsfield runs its own district for some grades and belongs to Masconomet and Essex North Shore for others; Topsfield accounts for 31% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Topsfield received $2 million in earmarks placed in the town and competitive grants over ten years, about the $1.9 million its size, need and institutions predict.

PEERS

Topsfield ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Topsfield this town	**34**	**$8,832**	**$158**	**$67.96**	**1.04**	**2.6%**
Mattapoisett peer	33	$6,007	$1,477	$18.09	2.08	2.2%
Littleton peer	37	$7,885	$1,660	$62.74	5.22	3.1%
Rowley peer	41	$9,213	$259	$26.57	0.42	2.7%
Stow peer	33	$7,771	$488	$90.02	2.17	2.4%
Harvard peer	39	$8,662	$563	$18.05	0.96	2.1%
Essex best in class of 30	32	$7,261	$477	$208	0.75	2.6%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Townsend

Town · Middlesex County · 9,100 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Middlesex · Margaret R. Scarsdale

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

North Middlesex Regional School District, shared with Ashby and Pepperell
Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Groton, Littleton, Pepperell, Shirley and Westford

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Townsend scores 54 on the Fairness Index for all state aid and 38 for discretionary money. Fifty is a fair share.

ALL STATE AID

54 / 100

91st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
58	54	54	50

Rank under other weightings: 80th to 110th.

Weighting-dependent: the range crosses the 45–55 band

Townsend received more than its share of state aid on three of four measures; its blended score of 54 stays between 53 and 55 under every weighting tested.

DISCRETIONARY MONEY ONLY

38 / 100

231st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	36	42	33

Rank under other weightings: 215th to 245th.

Stable low: below 45 under every weighting

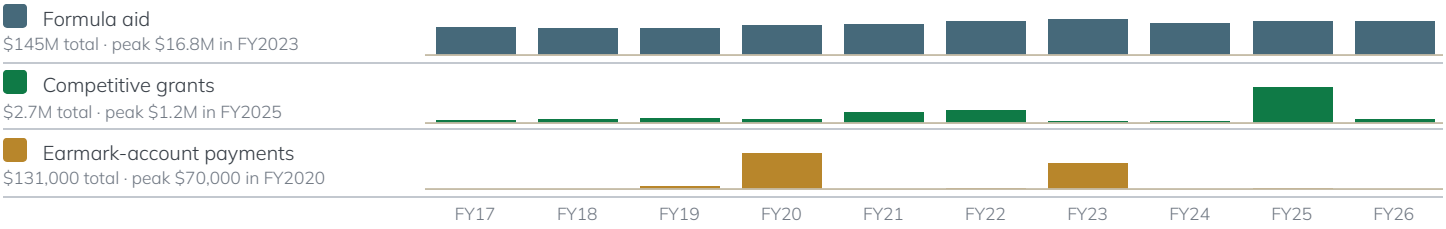
Townsend received less than its share of discretionary money on all four measures; its blended score of 38 stays between 36 and 40 under every weighting tested.

STATE MONEY, FY2017–FY2026

Townsend's town government and school districts received $145 million in formula aid and $2.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$145M	**$2.7M**	**$131,000**
$15,988 per resident (61st of 351) · gross	$300 per resident (210th of 351)	$14.39 per resident (233rd of 351)

Competitive grants to Townsend peaked in FY2025 at $1.2 million, 43% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.6 million, are not shown.

EARMARKS

Townsend received $267,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$267,000	**$267,000**	**$267,000**	**Not a member**
$29.35 per resident (232nd of 351)	$29.35 per resident (244th of 351)	$29.35 per resident (244th of 351)	35 municipalities had none

Placed in the town: eight clauses in seven of ten budgets; the most recent in FY2026. Every one names Townsend directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$70,000	"the removal and replacement of the sidewalks in the town common in the town of Townsend"	Enacted names the town
FY2018	$65,000	"the police department in the town of Townsend for new radio systems"	Enacted names the town
FY2024	$35,000	"Townsend Ecumenical Outreach, Inc. for infrastructure upgrades"	Enacted names the town
FY2026	$30,000	"the town of Townsend for the completion of the fitness court project"	Enacted names the town
FY2024	$25,000	"the connection of phase 2 of the Squannacook river rail trail to phase 4 through the construction of the connecting section of trail in the town of…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Townsend received 75% of its proportional share of competitive grant awards.

Local road miles **85.6** 136th of 351 · 9.4 per 1,000 residents (116th of 351)	Town-owned bridges, replacement cost **$18M** scored exposure $4M · two in poor condition	Road-stream crossings **148** 42nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **32.7 sq mi** 35% state-owned	Seasonal homes **0%** share of housing units	Peak service population **9,100** residents plus seasonal	Core infrastructure index **0.80** roads, culverts, dams, coast, flood, energy

Burden index 0.75; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **7,327 acres** 35.0% of land area · FY2026	State-owned land PILOT, FY2026 **$375,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$51.14** statewide $117 · FY2026	New growth per resident **$8,530** FY2017–2025 · 333rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.6% of Townsend's general-fund spending in FY2025, down from 9.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.8%** $1.4M of $14.4M · median town 14.1%	FY2016 **7.7%** $1.5M of $19.4M · median town 12.2%	FY2025 **7.6%** $2.1M of $27.6M · median town 11.5%	Net of state charges, FY2025 **7.3%** FY2010: 8.1% · median town 10.0%

Townsend's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $10.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Townsend's state aid did not keep pace with either price measure: FY2025 aid was 4.1% below its FY2006 aid grown by Boston-area consumer prices and 14.8% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $2.1 million in FY2025, +48.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+15.8%** $952,000 to $1.1M · all towns +54.0%	All fixed costs, FY2016–25 **+33.0%** $1.9M to $2.5M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Townsend's health insurance would have been $1.19 million in FY2025; it was $1.10 million, $87,000 below the path. Its fixed costs would have been $2.35 million in FY2025; it was $2.51 million, $152,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Townsend came to $237,000, 157.7% of the $150,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$237,000	157.7%	28.2%
Placed in the town	$237,000	157.7%	42.3%
Everything placed	$237,000	157.7%	45.2%

SCHOOLS

Townsend's required school contribution is 2.3% of median household income, 269th highest of 351.

Chapter 70 aid, FY2026 **$10.1M** attributed to the town	Required local contribution **$9.5M** FY2026
Share of household income **2.3%** 269th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

Townsend has no school district of its own. Its pupils attend North Middlesex and Nashoba Valley; Townsend accounts for 38% and 15% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Townsend received $3.1 million in earmarks placed in the town and competitive grants over ten years, 46% of the $6.8 million its size, need and institutions predict.

PEERS

Townsend ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Townsend this town	**54**	**$15,988**	**$300**	**$29.35**	**0.75**	**2.3%**
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Oxford peer	52	$13,864	$491	$15.69	1.37	2.7%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Truro

Town · Barnstable County · 1,708 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
4th Barnstable · Hadley Luddy

STATE SENATE
Cape and Islands · Julian Cyr

SCHOOL DISTRICTS
Truro Public Schools, the town's own district
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans and three others

REGIONAL PLANNING AGENCY
Cape Cod Commission

FAIRNESS INDEX

Truro scores 56 on the Fairness Index for all state aid and 97 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

67th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	67	55	48

Rank under other weightings: 41st to 99th.

Weighting-dependent: the range crosses the 45–55 band

Truro received more than its share of state aid on three of four measures; its blended score of 56 stays between 53 and 59 under every weighting tested.

DISCRETIONARY MONEY ONLY

97 / 100

6th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
99	99	93	98

Rank under other weightings: 4th to 10th.

Stable high: above 55 under every weighting

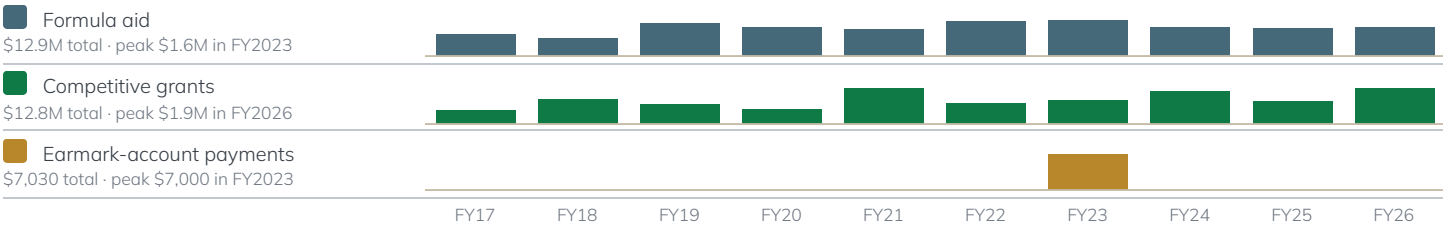
Truro received more than its share of discretionary money on all four measures; its blended score of 97 stays between 96 and 98 under every weighting tested.

STATE MONEY, FY2017–FY2026

Truro's town government and school districts received $12.9 million in formula aid and $12.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$12.9M	**$12.8M**	**$7,030**
$7,537 per resident (274th of 351) · gross	$7,483 per resident (7th of 351)	$4.12 per resident (298th of 351)

Competitive grants to Truro were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $15.5 million, are not shown.

EARMARKS

Truro received $72,000 in local earmarks naming the town, $222,000 placed in the town and $222,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$72,000	**$222,000**	**$222,000**	**Not a member**
$42.15 per resident (171st of 351)	$130 per resident (41st of 351)	$130 per resident (45th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2024. $72,000 came in clauses that name Truro; the other $150,000 went to organizations based in Truro, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$50,000	"Sustainable CAPE – Center for Agricultural Preservation & Education-Foundation, Inc. for a local food access, education and affordability program"	Enacted recipient based here
FY2023	$50,000	"Sustainable CAPE – Center for Agricultural Preservation & Education for a local food access, education and affordability program"	Enacted recipient based here
FY2022	$50,000	"Sustainable CAPE – Center for Agricultural Preservation & Education for a local food access, education and affordability program"	Enacted recipient based here
FY2019	$35,000	"Sustainable Cape in the town of Truro for a local food access and affordability program to: (a) expand a coalition of farmers' markets throughout the..."	Enacted names the town
FY2020	$25,000	"the town of Truro to engage in a community planning process for the recently acquired Walsh property"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Truro received 1.62 times its proportional share of competitive grant awards.

Local road miles **38.2** 300th of 351 · 22.4 per 1,000 residents (53rd of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **22** 326th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **21.0 sq mi** 0% state-owned	Seasonal homes **68%** share of housing units	Peak service population **5,499** residents plus seasonal	Core infrastructure index **0.46** roads, culverts, dams, coast, flood, energy

Burden index 1.62; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$504** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$475** statewide $117 · FY2026	New growth per resident **$133,441** FY2017–2025 · 7th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.5% of Truro's general-fund spending in FY2025, down from 4.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.4%** $514,000 of $11.7M · median town 14.1%	FY2016 **2.7%** $455,000 of $17M · median town 12.2%	FY2025 **2.5%** $666,000 of $26.9M · median town 11.5%	Net of state charges, FY2025 **0.0%** FY2010: 1.9% · median town 10.0%

Truro's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $46,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Truro's state aid did not keep pace with either price measure: FY2025 aid was 16.5% below its FY2006 aid grown by Boston-area consumer prices and 25.8% below grown by the government price index.

Gross state aid went from $514,000 in FY2006 to $666,000 in FY2025, +29.5% in dollars. Flag: in FY2010, $179,000 of Truro's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.3%** $1.2M to $1.8M · all towns +54.0%	All fixed costs, FY2016–25 **+61.4%** $2.3M to $3.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Truro's health insurance would have been $1.49 million in FY2025; it was $1.78 million, $291,000 above the path. Its fixed costs would have been $2.91 million in FY2025; it was $3.76 million, $850,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Truro came to $72,000, 12.2% of the $589,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$72,000	12.2%	28.2%
Placed in the town	$222,000	37.7%	42.3%
Everything placed	$222,000	37.7%	45.2%

SCHOOLS

Truro's required school contribution is 1.6% of median household income, 331st highest of 351.

Chapter 70 aid, FY2026 **$505,000** to the town's district	Required local contribution **$1.9M** FY2026
Share of household income **1.6%** 331st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+33%** after inflation

Truro runs its own school district and also belongs to Cape Cod; Truro accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Truro received $13.1 million in earmarks placed in the town and competitive grants over ten years, 51% more than the $8.7 million its size, need and institutions predict.

PEERS

Truro ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Truro this town	**56**	**$7,537**	**$7,483**	**$130**	**1.62**	**1.6%**
Otis peer · lowest in class of 30	43	$6,679	$2,109	$0	1.01	2.2%
Chilmark peer	33	$5,153	$334	$0	0.74	1.4%
New Marlborough peer	49	$8,719	$3,098	$0	2.06	2.0%
Stockbridge peer	42	$6,979	$1,448	$140	2.33	1.5%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Tyngsborough

Town · Middlesex County · 12,550 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
36th Middlesex · Colleen M. Garry

STATE SENATE
First Middlesex · Vanna Howard (since March 2026) and Edward J. Kennedy (until October 2025)

SCHOOL DISTRICTS
Tyngsborough Public Schools, the town's own district
Greater Lowell Regional Vocational Technical School District, vocational, shared with Dracut, Dunstable and Lowell

REGIONAL PLANNING AGENCY
Northern Middlesex Council Of Governments

FAIRNESS INDEX

Tyngsborough scores 42 on the Fairness Index for all state aid and 73 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

199th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	46	41	37

Rank under other weightings: 190th to 206th.

Stable low: below 45 under every weighting

Tyngsborough received less than its share of state aid on all four measures; its blended score of 42 stays between 40 and 43 under every weighting tested.

DISCRETIONARY MONEY ONLY

73 / 100

97th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
73	76	74	68

Rank under other weightings: 91st to 102nd.

Stable high: above 55 under every weighting

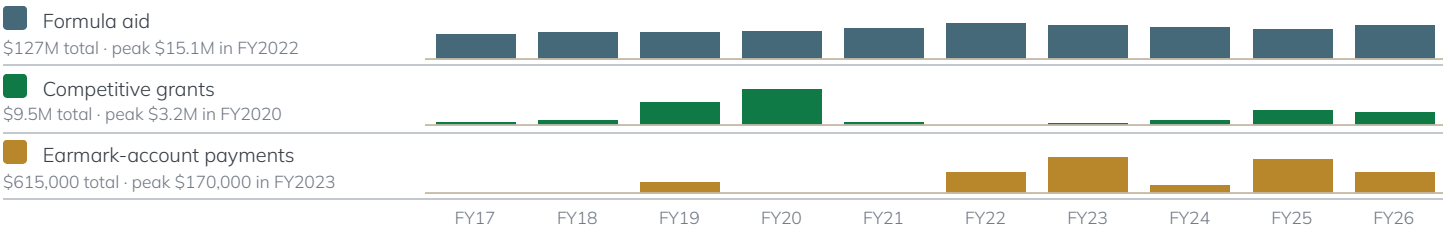
Tyngsborough received more than its share of discretionary money on all four measures; its blended score of 73 stays between 71 and 74 under every weighting tested.

STATE MONEY, FY2017–FY2026

Tyngsborough's town government and school districts received $127 million in formula aid and $9.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$127M	**$9.5M**	**$615,000**
$10,115 per resident (174th of 351) · gross	$758 per resident (103rd of 351)	$49.04 per resident (81st of 351)

Competitive grants to Tyngsborough peaked in FY2020 at $3.2 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.4 million, are not shown.

EARMARKS

Tyngsborough received $555,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$555,000	**$555,000**	**$555,000**	**Not a member**
$44.22 per resident (164th of 351)	$44.22 per resident (185th of 351)	$44.22 per resident (188th of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. Every one names Tyngsborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$80,000	"town center improvements in the town of Tyngsborough"	Enacted names the town
FY2026	$75,000	"the municipal improvements in the town of Tyngsborough"	Enacted names the town
FY2025	$75,000	"the department of public works infrastructure in the town of Tyngsborough"	Enacted names the town
FY2025	$50,000	"necessary safety equipment for the Tyngsborough fire department"	Enacted names the town
FY2024	$50,000	"public safety electric vehicle infrastructure in the town of Tyngsborough"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Tyngsborough received 2.20 times its proportional share of competitive grant awards.

Local road miles **80.7** 155th of 351 · 6.4 per 1,000 residents (178th of 351)	Town-owned bridges, replacement cost **$2.1M** scored exposure $471,000 · none in poor condition	Road-stream crossings **139** 54th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.8 sq mi** 4% state-owned	Seasonal homes **1%** share of housing units	Peak service population **12,704** residents plus seasonal	Core infrastructure index **1.31** roads, culverts, dams, coast, flood, energy

Burden index 2.20; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **414 acres** 3.9% of land area · FY2026	State-owned land PILOT, FY2026 **$50,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$122** statewide $117 · FY2026	New growth per resident **$19,460** FY2017–2025 · 195th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 18.2% of Tyngsborough's general-fund spending in FY2025, down from 31.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **31.7%** $8.8M of $27.7M · median town 14.1%	FY2016 **23.9%** $8.7M of $36.2M · median town 12.2%	FY2025 **18.2%** $9.7M of $53M · median town 11.5%	Net of state charges, FY2025 **14.5%** FY2010: 30.2% · median town 10.0%

Tyngsborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $679,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Tyngsborough's state aid did not keep pace with either price measure: FY2025 aid was 28.9% below its FY2006 aid grown by Boston-area consumer prices and 36.8% below grown by the government price index.

Gross state aid went from $8.8 million in FY2006 to $9.7 million in FY2025, +10.2% in dollars. Flag: in FY2010, $877,000 of Tyngsborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+32.8%** $3.2M to $4.2M · all towns +54.0%	All fixed costs, FY2016–25 **+60.2%** $5.2M to $8.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Tyngsborough's health insurance would have been $3.94 million in FY2025; it was $4.19 million, $250,000 above the path. Its fixed costs would have been $6.51 million in FY2025; it was $8.35 million, $1.84 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Tyngsborough came to $430,000, 41.6% of the $1.03 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$430,000	41.6%	28.2%
Placed in the town	$430,000	41.6%	42.3%
Everything placed	$430,000	41.6%	45.2%

SCHOOLS

Tyngsborough's required school contribution is 3.2% of median household income, 37th highest of 351.

Chapter 70 aid, FY2026 **$8.8M** to the town's district	Required local contribution **$17.5M** FY2026
Share of household income **3.2%** 37th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–9%** after inflation

Tyngsborough runs its own school district and also belongs to Greater Lowell; Tyngsborough accounts for 5% of that district's foundation budget.

EXPECTED AND ACTUAL

Tyngsborough received $10.3 million in earmarks placed in the town and competitive grants over ten years, 77% more than the $5.8 million its size, need and institutions predict.

PEERS

Tyngsborough ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Tyngsborough this town	**42**	**$10,115**	**$758**	**$44.22**	**2.20**	**3.2%**
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Wilbraham peer	44	$12,134	$123	$109	0.42	3.1%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Lunenburg peer	40	$10,667	$157	$54.36	0.42	2.7%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Tyringham

Town · Berkshire County · 494 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Tyringham operates no schools of its own and belongs to no regional district in DESE's FY2026 files.

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Tyringham scores 34 on the Fairness Index for all state aid and 24 for discretionary money. Fifty is a fair share.

ALL STATE AID

34 / 100
269th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	41	27	40

Rank under other weightings: 249th to 298th.

Stable low: below 45 under every weighting

Tyringham received less than its share of state aid on all four measures; its blended score of 34 stays between 30 and 38 under every weighting tested.

DISCRETIONARY MONEY ONLY

24 / 100
294th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	34	7	33

Rank under other weightings: 270th to 315th.

Stable low: below 45 under every weighting

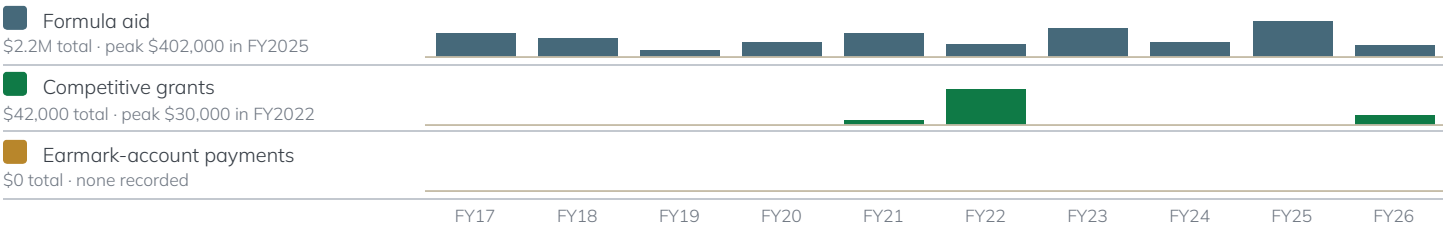
Tyringham received less than its share of discretionary money on all four measures; its blended score of 24 stays between 19 and 30 under every weighting tested.

STATE MONEY, FY2017–FY2026

Tyringham's town government and school districts received $2.2 million in formula aid and $42,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$2.2M	$42,000	$0
$4,388 per resident (349th of 351) · gross	$85.59 per resident (334th of 351)	$0 per resident (339th of 351)

Competitive grants to Tyringham peaked in FY2022 at $30,000, 71% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 494 residents, a single payment moves Tyringham's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $121,000, are not shown.

EARMARKS

No local earmark was placed in Tyringham in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	$0	$0	Member
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Tyringham's five nearest peers (enacted)				
Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Alford	$0	$0	$0	$0
Monterey	$0	$0	$0	$0
Mount Washington	$0	$0	$0	$0
Aquinnah	$100,000	$100,000	$100,000	$150
New Marlborough	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, Tyringham received 28% of its proportional share of competitive grant awards.

Local road miles **25.6** 328th of 351 · 51.8 per 1,000 residents (24th of 351)	Town-owned bridges, replacement cost **$7.5M** scored exposure $3M · one in poor condition	Road-stream crossings **33** 310th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **18.6 sq mi** 7% state-owned	Seasonal homes **38%** share of housing units	Peak service population **815** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.28; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **754 acres** 6.3% of land area · FY2026	State-owned land PILOT, FY2026 **$30,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$39.43** statewide $117 · FY2026	New growth per resident **$40,348** FY2017–2025 · 56th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.0% of Tyringham's general-fund spending in FY2025, up from 4.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.7%** $49,000 of $1M · median town 14.1%	FY2016 **5.1%** $65,000 of $1.3M · median town 12.2%	FY2025 **6.0%** $107,000 of $1.8M · median town 11.5%	Net of state charges, FY2025 **2.1%** FY2010: 3.6% · median town 10.0%

Tyringham's state aid kept pace with both price measures: FY2025 aid was 39.3% above its FY2006 aid grown by Boston-area consumer prices and 23.8% above grown by the government price index.

Gross state aid went from $49,000 in FY2006 to $107,000 in FY2025, +116.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.1%** $97,000 to $118,000 · all towns +54.0%	All fixed costs, FY2016–25 **+30.0%** $196,000 to $255,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Tyringham's health insurance would have been $121,000 in FY2025; it was $118,000, $2,719 below the path. Its fixed costs would have been $245,000 in FY2025; it was $255,000, $9,924 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2018 (+43%) and FY2019 (–34%); health insurance changed by more than 30% in one year in FY2023 (+38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Tyringham came to $0, 0.0% of the $21,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Tyringham's required school contribution is 1.0% of median household income, the eighth-lowest of 351.

Chapter 70 aid, FY2026 **$73,000** attributed to the town	Required local contribution **$343,000** FY2026
Share of household income **1.0%** 344th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+4%** after inflation

Tyringham operates no schools. DESE carries it as a non-operating district, and its pupils attend schools in other districts.

EXPECTED AND ACTUAL

Tyringham received $165,000 in earmarks placed in the town and competitive grants over ten years, 19% of the $876,000 its size, need and institutions predict.

PEERS

Tyringham is one of seven municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Tyringham this town	**34**	**$4,388**	**$85.59**	**$0**	**0.28**	**1.0%**
Alford peer · lowest in class of 30	43	$5,565	$1,817	$0	0.13	0.9%
Monterey peer	67	$11,798	$7,628	$0	3.68	1.8%
Mount Washington peer	62	$22,393	$6,365	$0	1.07	0.4%
Aquinnah peer	38	$6,830	$786	$150	2.09	1.9%
New Marlborough peer	49	$8,719	$3,098	$0	2.06	2.0%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Upton

Town · Worcester County · 8,189 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
9th Worcester · David K. Muradian, Jr.

STATE SENATE
Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS
Mendon-Upton Regional School District, shared with Mendon
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury and four others

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Upton scores 56 on the Fairness Index for all state aid and 69 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

66th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	70	50	50

Rank under other weightings: 46th to 98th.

Weighting-dependent: the range crosses the 45–55 band

Upton received more than its share of state aid on all four measures; its blended score of 56 stays between 53 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

69 / 100

108th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	79	70	62

Rank under other weightings: 99th to 121st.

Stable high: above 55 under every weighting

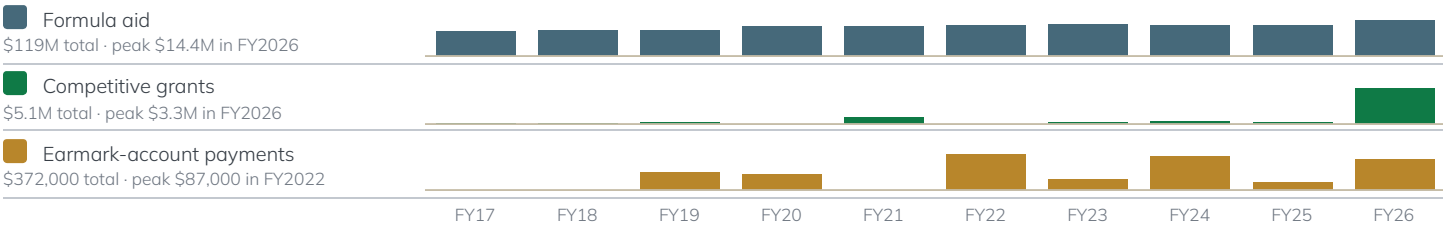
Upton received more than its share of discretionary money on all four measures; its blended score of 69 stays between 66 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Upton's town government and school districts received $119 million in formula aid and $5.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$119M	$5.1M	$372,000
$14,491 per resident (85th of 351) · gross	$622 per resident (120th of 351)	$45.45 per resident (88th of 351)

Competitive grants to Upton peaked in FY2026 at $3.3 million, 64% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.7 million, are not shown.

EARMARKS

Upton received $333,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$333,000	$333,000	$333,000	Not a member
$40.72 per resident (183rd of 351)	$40.72 per resident (201st of 351)	$40.72 per resident (204th of 351)	35 municipalities had none

Placed in the town: 12 clauses in ten of ten budgets; the most recent in FY2026. Every one names Upton directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$50,000	"public health and safety improvements in the town of Upton, including for the development of an unmanned aircraft system program and for the purchase…"	Enacted names the town
FY2019	$43,000	"the town of Upton for public safety improvements"	Enacted names the town
FY2018	$27,000	"the town of Upton for public safety improvements"	Enacted names the town
FY2017	$27,000	"the town of Upton for public safety improvements"	Enacted names the town
FY2026	$25,000	"public safety improvements in the town of Upton"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Upton received 1.73 times its proportional share of competitive grant awards.

Local road miles **65.2** 202nd of 351 · 8.0 per 1,000 residents (137th of 351)	Town-owned bridges, replacement cost **$9.5M** scored exposure $2.8M · one in poor condition	Road-stream crossings **178** 22nd of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **21.6 sq mi** 17% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,189** residents plus seasonal	Core infrastructure index **0.27** roads, culverts, dams, coast, flood, energy

Burden index 1.73; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,277 acres** 16.5% of land area · FY2026	State-owned land PILOT, FY2026 **$383,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$168** statewide $117 · FY2026	New growth per resident **$23,611** FY2017–2025 · 149th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.9% of Upton's general-fund spending in FY2025, down from 4.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.5%** $660,000 of $14.7M · median town 14.1%	FY2016 **3.5%** $718,000 of $20.6M · median town 12.2%	FY2025 **3.9%** $1.1M of $28.6M · median town 11.5%	Net of state charges, FY2025 **3.7%** FY2010: 3.9% · median town 10.0%

Upton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Upton's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 10.1% above its FY2006 aid grown by Boston-area consumer prices and 2.1% below grown by the government price index.

Gross state aid went from $660,000 in FY2006 to $1.1 million in FY2025, +70.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+60.9%** $840,000 to $1.4M · all towns +54.0%	All fixed costs, FY2016–25 **+87.8%** $1.3M to $2.5M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Upton's health insurance would have been $1.05 million in FY2025; it was $1.35 million, $303,000 above the path. Its fixed costs would have been $1.64 million in FY2025; it was $2.46 million, $826,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Upton came to $308,000, 60.3% of the $512,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$308,000	60.3%	28.2%
Placed in the town	$308,000	60.3%	42.3%
Everything placed	$308,000	60.3%	45.2%

SCHOOLS

Upton's required school contribution is 2.8% of median household income, 118th highest of 351.

Chapter 70 aid, FY2026 **$8.2M** attributed to the town	Required local contribution **$13.2M** FY2026
Share of household income **2.8%** 118th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Upton has no school district of its own. Its pupils attend Upton, Mendon-Upton and Blackstone Valley; Upton accounts for 100%, 58% and 7% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Upton received $5.4 million in earmarks placed in the town and competitive grants over ten years, 41% more than the $3.9 million its size, need and institutions predict.

PEERS

Upton ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Upton this town	**56**	**$14,491**	**$622**	**$40.72**	**1.73**	**2.8%**
Groton peer · lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%
Oak Bluffs peer	51	$8,440	$2,606	$93.40	3.64	3.0%
Wenham peer	29	$6,869	$147	$69.20	0.80	2.5%
Southborough peer	36	$8,275	$159	$31.45	0.58	2.5%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Uxbridge

Town · Worcester County · 14,473 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

8th Worcester · Michael J. Soter 76% of residents
18th Worcester · Joseph D. McKenna 24% of residents

Uxbridge is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Uxbridge Public Schools, the town's own district
Blackstone Valley Regional Vocational Technical School District, vocational, shared with Bellingham, Blackstone, Douglas, Grafton, Hopedale, Mendon, Milford, Millbury and four others

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Uxbridge scores 48 on the Fairness Index for all state aid and 56 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

142nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	55	47	44

Rank under other weightings: 127th to 154th.

Near fair: between 45 and 55 under every weighting

Uxbridge received less than its share of state aid on three of four measures; its blended score of 48 stays between 46 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

56 / 100

156th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	62	57	52

Rank under other weightings: 151st to 170th.

Weighting-dependent: the range crosses the 45–55 band

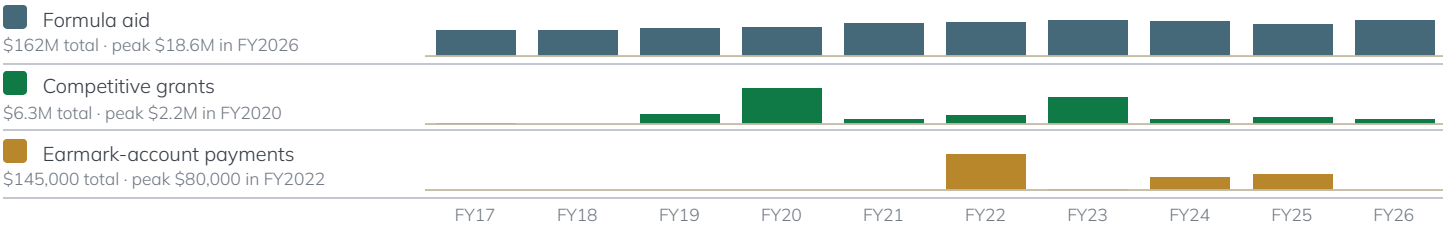
Uxbridge received more than its share of discretionary money on all four measures; its blended score of 56 stays between 53 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Uxbridge's town government and school districts received $162 million in formula aid and $6.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$162M	**$6.3M**	**$145,000**
$11,199 per resident (140th of 351) · gross	$436 per resident (156th of 351)	$10.00 per resident (259th of 351)

Competitive grants to Uxbridge peaked in FY2020 at $2.2 million, 34% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.9 million, are not shown.

EARMARKS

Uxbridge received $225,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$225,000	**$225,000**	**$225,000**	**Not a member**
$15.55 per resident (280th of 351)	$15.55 per resident (288th of 351)	$15.55 per resident (289th of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2026. Every one names Uxbridge directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$75,000	"the town of Uxbridge for emergency dispatch center capital improvements"	Enacted names the town
FY2022	$25,000	"the town of Uxbridge for design fees to streamline efficiencies and cost savings in combining the town hall and the senior center into 1 municipal..."	Enacted names the town
FY2020	$25,000	"the town of Uxbridge for increased accessibility plans for the senior center"	Enacted names the town
FY2019	$25,000	"the improvements and expansion of the Uxbridge Senior Center"	Enacted names the town
FY2018	$25,000	"the replacement of the Richardson Street Broadcast Tower for the town of Uxbridge"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Uxbridge received 1.22 times its proportional share of competitive grant awards.

Local road miles **102.5** 88th of 351 · 7.1 per 1,000 residents (156th of 351)	Town-owned bridges, replacement cost **$18.5M** scored exposure $7.2M · four in poor condition	Road-stream crossings **162** 32nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **29.6 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **14,507** residents plus seasonal	Core infrastructure index **1.78** roads, culverts, dams, coast, flood, energy

Burden index 1.22; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **622 acres** 3.3% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$87.61** statewide $117 · FY2026	New growth per resident **$51,649** FY2017–2025 · 34th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 20.7% of Uxbridge's general-fund spending in FY2025, down from 40.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **40.8%** $12.7M of $31.2M · median town 14.1%	FY2016 **28.8%** $12.1M of $41.9M · median town 12.2%	FY2025 **20.7%** $12.4M of $60.1M · median town 11.5%	Net of state charges, FY2025 **19.1%** FY2010: 31.3% · median town 10.0%

Uxbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $832,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Uxbridge's state aid did not keep pace with either price measure: FY2025 aid was 37.1% below its FY2006 aid grown by Boston-area consumer prices and 44.1% below grown by the government price index.

Gross state aid went from $12.7 million in FY2006 to $12.4 million in FY2025, –2.5% in dollars. Flag: in FY2010, $903,000 of Uxbridge's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.7%** $5M to $7.1M · all towns +54.0%	All fixed costs, FY2016–25 **+55.0%** $7.2M to $11.2M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Uxbridge's health insurance would have been $6.30 million in FY2025; it was $7.10 million, $798,000 above the path. Its fixed costs would have been $9.01 million in FY2025; it was $11.2 million, $2.17 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Uxbridge came to $210,000, 10.2% of the $2.05 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$210,000	10.2%	28.2%
Placed in the town	$210,000	10.2%	42.3%
Everything placed	$210,000	10.2%	45.2%

SCHOOLS

Uxbridge's required school contribution is 2.8% of median household income, 135th highest of 351.

Chapter 70 aid, FY2026 **$10.7M** to the town's district	Required local contribution **$19.1M** FY2026
Share of household income **2.8%** 135th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Uxbridge runs its own school district and also belongs to Blackstone Valley; Uxbridge accounts for 10% of that district's foundation budget.

EXPECTED AND ACTUAL

Uxbridge received $6.6 million in earmarks placed in the town and competitive grants over ten years, 59% more than the $4.1 million its size, need and institutions predict.

PEERS

Uxbridge ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Uxbridge this town	**48**	**$11,199**	**$436**	**$15.55**	**1.22**	**2.8%**
Pembroke peer	44	$10,627	$65.81	$40.00	0.27	2.6%
Swansea peer	40	$9,140	$526	$72.01	1.42	2.6%
Georgetown peer	46	$10,873	$155	$26.52	0.60	2.7%
Holden peer	49	$13,276	$103	$15.70	0.39	2.6%
Rutland peer	59	$17,290	$124	$22.03	0.61	2.2%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Wakefield

Town · Middlesex County · 27,793 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Essex · Donald H. Wong 57% of residents
32nd Middlesex · Kate Lipper-Garabedian 43% of residents

Wakefield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fifth Middlesex · Jason M. Lewis

SCHOOL DISTRICTS

Wakefield Public Schools, the town's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Saugus, Stoneham and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Wakefield scores 28 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

328th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	36	26	24

Rank under other weightings: 320th to 332nd.

Stable low: below 45 under every weighting

Wakefield received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100

279th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	34	28	23

Rank under other weightings: 273rd to 285th.

Stable low: below 45 under every weighting

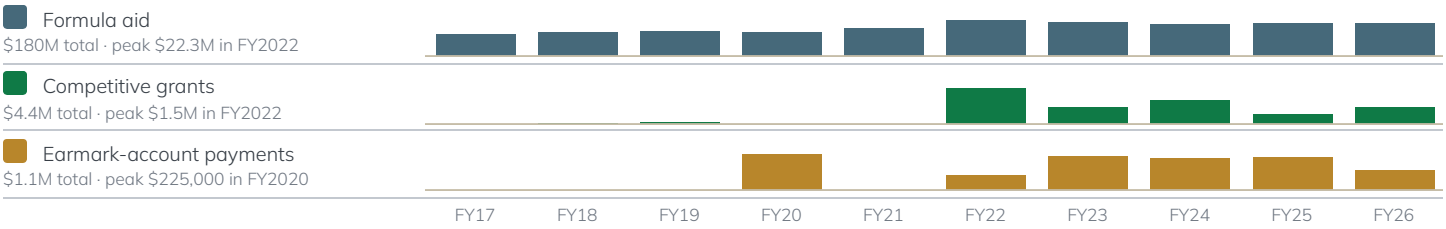
Wakefield received less than its share of discretionary money on all four measures; its blended score of 27 stays between 25 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wakefield's town government and school districts received $180 million in formula aid and $4.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$180M	**$4.4M**	**$1.1M**
$6,465 per resident (320th of 351) · gross	$157 per resident (281st of 351)	$37.98 per resident (118th of 351)

Competitive grants to Wakefield peaked in FY2022 at $1.5 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16.8 million, are not shown.

EARMARKS

Wakefield received $1.3 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.3M	**$1.3M**	**$1.3M**	**Not a member**
$45.34 per resident (161st of 351)	$45.34 per resident (184th of 351)	$45.34 per resident (186th of 351)	35 municipalities had none

Placed in the town: 24 clauses in nine of ten budgets; the most recent in FY2026. Every one names Wakefield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$125,000	"improvements to the Americal civic center in Wakefield"	Enacted names the town
FY2019	$100,000	"the Albion Cultural Exchange in the town of Wakefield for elderly access improvements"	Enacted names the town
FY2018	$100,000	"main street economic development by Wakefield Main Streets, Inc. in the town of Wakefield"	Enacted names the town
FY2017	$100,000	"planning and construction of an arts center on Main street in the town of Wakefield"	Enacted names the town
FY2026	$75,000	"heating and cooling renovations on the top floors of the town of Wakefield's senior center"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wakefield received 56% of its proportional share of competitive grant awards.

Local road miles **84.8** 139th of 351 · 3.0 per 1,000 residents (316th of 351)	Town-owned bridges, replacement cost **$5M** scored exposure $1.3M · none in poor condition	Road-stream crossings **43** 287th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **7.4 sq mi** 1% state-owned	Seasonal homes **1%** share of housing units	Peak service population **28,065** residents plus seasonal	Core infrastructure index **0.40** roads, culverts, dams, coast, flood, energy

Burden index 0.56; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **23 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$58,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,547** statewide $117 · FY2026	New growth per resident **$26,738** FY2017–2025 · 127th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.0% of Wakefield's general-fund spending in FY2025, down from 18.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **18.0%** $9.7M of $53.9M · median town 14.1%	FY2016 **12.8%** $9.9M of $77.9M · median town 12.2%	FY2025 **12.0%** $13.8M of $115M · median town 11.5%	Net of state charges, FY2025 **9.8%** FY2010: 13.6% · median town 10.0%

Wakefield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $457,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wakefield's state aid did not keep pace with either price measure: FY2025 aid was 7.8% below its FY2006 aid grown by Boston-area consumer prices and 18.1% below grown by the government price index.

Gross state aid went from $9.7 million in FY2006 to $13.8 million in FY2025, +42.9% in dollars. Flag: in FY2010, $988,000 of Wakefield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.8%** $10.9M to $13.4M · all towns +54.0%	All fixed costs, FY2016–25 **+36.9%** $16.2M to $22.2M · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **1 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wakefield's health insurance would have been $13.7 million in FY2025; it was $13.4 million, $223,000 below the path. Its fixed costs would have been $20.3 million in FY2025; it was $22.2 million, $1.94 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wakefield came to $1.1 million, 43.6% of the $2.50 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.1M	43.6%	28.2%
Placed in the town	$1.1M	43.6%	42.3%
Everything placed	$1.1M	43.6%	45.2%

SCHOOLS

Wakefield's required school contribution is 2.6% of median household income, 178th highest of 351.

Chapter 70 aid, FY2026 **$9.9M** to the town's district	Required local contribution **$39.8M** FY2026
Share of household income **2.6%** 178th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+21%** after inflation

Wakefield runs its own school district and also belongs to Northeast Metropolitan; Wakefield accounts for 7% of that district's foundation budget.

EXPECTED AND ACTUAL

Wakefield received $5.8 million in earmarks placed in the town and competitive grants over ten years, 82% of the $7.1 million its size, need and institutions predict.

PEERS

Wakefield ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wakefield this town	**28**	**$6,465**	**$157**	**$45.34**	**0.56**	**2.6%**
Natick peer	28	$6,624	$86.76	$82.28	0.56	2.7%
Newburyport peer	33	$6,797	$442	$77.12	0.78	2.0%
Burlington peer	35	$7,194	$367	$102	0.46	3.0%
Milton peer · best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Canton peer	29	$6,511	$84.68	$52.89	0.29	2.9%
Scituate lowest in class of 30	34	$7,209	$711	$18.25	3.23	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Wales

Town · Hampden County · 1,929 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Wales Public Schools, the town's own district

Tantasqua Regional School District, shared with Brimfield, Brookfield, Holland and Sturbridge

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Wales scores 59 on the Fairness Index for all state aid and 70 for discretionary money. Fifty is a fair share.

ALL STATE AID

59 / 100

50th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	58	59	59

Rank under other weightings: 44th to 61st.

Stable high: above 55 under every weighting

Wales received more than its share of state aid on all four measures; its blended score of 59 stays between 59 and 59 under every weighting tested.

DISCRETIONARY MONEY ONLY

70 / 100

105th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
74	72	65	72

Rank under other weightings: 98th to 113th.

Stable high: above 55 under every weighting

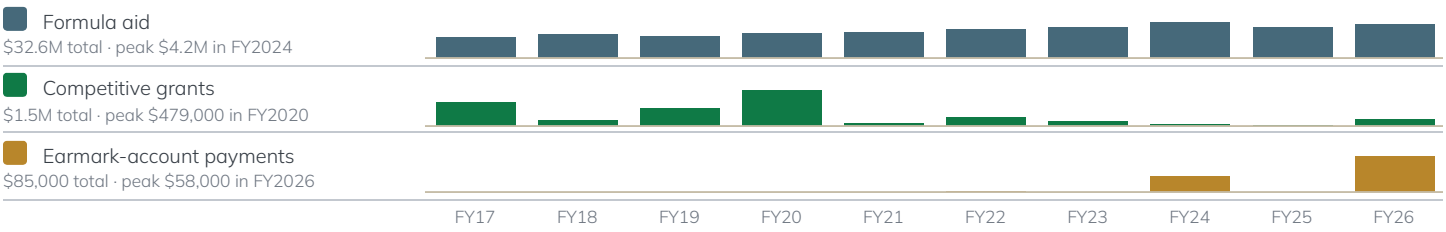
Wales received more than its share of discretionary money on all four measures; its blended score of 70 stays between 69 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wales's town government and school districts received $32.6 million in formula aid and $1.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$32.6M	**$1.5M**	**$85,000**
$16,913 per resident (50th of 351) · gross	$776 per resident (98th of 351)	$43.91 per resident (95th of 351)

Competitive grants to Wales peaked in FY2020 at $479,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $854,000, are not shown.

EARMARKS

Wales received $170,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$170,000	**$170,000**	**$170,000**	**Not a member**
$88.28 per resident (61st of 351)	$88.28 per resident (89th of 351)	$88.28 per resident (95th of 351)	35 municipalities had none

Placed in the town: four clauses in three of ten budgets; the most recent in FY2026. Every one names Wales directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$58,000	"the Wales fire department to replace self-contained breathing apparatuses"	Enacted names the town
FY2024	$50,000	"preservation work on the Wales old town hall in the town of Wales"	Enacted names the town
FY2024	$50,000	"the town of Wales for public safety infrastructure improvements at the Wales police department"	Enacted names the town
FY2018	$12,000	"a food pantry driver in the town of Wales"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wales received 37% of its proportional share of competitive grant awards.

Local road miles **25.5** 329th of 351 · 13.2 per 1,000 residents (78th of 351)	Town-owned bridges, replacement cost **$3M** scored exposure $1.5M · two in poor condition	Road-stream crossings **154** 34th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **15.8 sq mi** 15% state-owned	Seasonal homes **8%** share of housing units	Peak service population **2,112** residents plus seasonal	Core infrastructure index **0.30** roads, culverts, dams, coast, flood, energy

Burden index 0.37; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,605 acres** 15.9% of land area · FY2026	State-owned land PILOT, FY2026 **$75,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$46.53** statewide $117 · FY2026	New growth per resident **$8,475** FY2017–2025 · 336th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 29.4% of Wales's general-fund spending in FY2025, up from 27.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.0%** $871,000 of $3.2M · median town 14.1%	FY2016 **27.5%** $1.1M of $4.2M · median town 12.2%	FY2025 **29.4%** $1.7M of $5.7M · median town 11.5%	Net of state charges, FY2025 **25.9%** FY2010: 25.3% · median town 10.0%

Wales's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wales's state aid kept pace with both price measures: FY2025 aid was 24.7% above its FY2006 aid grown by Boston-area consumer prices and 10.8% above grown by the government price index.

Gross state aid went from $871,000 in FY2006 to $1.7 million in FY2025, +93.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **–5.9%** $371,000 to $349,000 · all towns +54.0%	All fixed costs, FY2016–25 **+57.4%** $491,000 to $773,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wales's health insurance would have been $463,000 in FY2025; it was $349,000, $114,000 below the path. Its fixed costs would have been $613,000 in FY2025; it was $773,000, $159,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+33%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Wales's reported health insurance fell from $371,000 in FY2016 to $349,000 in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$112,000	no increase	28.2%
Placed in the town	$112,000	no increase	42.3%
Everything placed	$112,000	no increase	45.2%

SCHOOLS

Wales's required school contribution is 2.1% of median household income, 297th highest of 351.

Chapter 70 aid, FY2026 **$2.5M** to the town's district	Required local contribution **$1.5M** FY2026
Share of household income **2.1%** 297th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

Wales runs its own district for some grades and belongs to Tantasqua for others; Wales accounts for 8% of that district's foundation budget.

EXPECTED AND ACTUAL

Wales received $1.7 million in earmarks placed in the town and competitive grants over ten years, 62% of the $2.7 million its size, need and institutions predict.

PEERS

Wales ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wales this town	**59**	**$16,913**	**$776**	**$88.28**	**0.37**	**2.1%**
Clarksburg peer	65	$21,258	$932	$15.00	3.56	2.1%
Gill peer	40	$9,063	$224	$50.29	0.47	2.3%
Bernardston peer · lowest in class of 30	55	$15,799	$1,227	$0	0.44	2.9%
East Brookfield peer	55	$15,885	$104	$94.64	0.06	3.2%
Warwick peer	52	$14,769	$2,887	$64.43	2.79	1.7%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Walpole

Town · Norfolk County · 26,388 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

12th Norfolk · John H. Rogers 50% of residents
8th Norfolk · Edward R. Philips 26% of residents
11th Norfolk · Paul McMurtry 12% of residents
9th Norfolk · Marcus S. Vaughn 12% of residents

Walpole is split among four House districts. Shares are of 2020 residents.

STATE SENATE

Norfolk and Suffolk · Michael F. Rush

SCHOOL DISTRICTS

Walpole Public Schools, the town's own district
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, North Attleborough, Plainville, Seekonk and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Walpole scores 30 on the Fairness Index for all state aid and 23 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

304th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	43	25	26

Rank under other weightings: 288th to 322nd.

Stable low: below 45 under every weighting

Walpole received less than its share of state aid on all four measures; its blended score of 30 stays between 27 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

23 / 100

302nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	33	22	18

Rank under other weightings: 290th to 306th.

Stable low: below 45 under every weighting

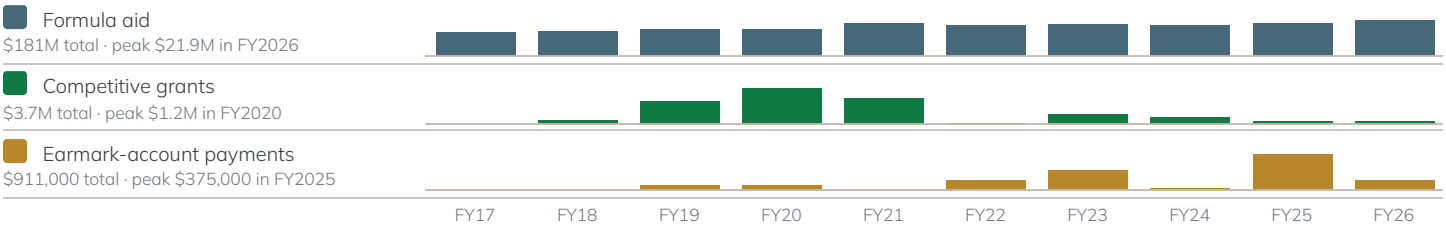
Walpole received less than its share of discretionary money on all four measures; its blended score of 23 stays between 21 and 26 under every weighting tested.

STATE MONEY, FY2017–FY2026

Walpole's town government and school districts received $181 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$181M	**$3.7M**	**$911,000**
$6,864 per resident (296th of 351) · gross	$139 per resident (299th of 351)	$34.54 per resident (132nd of 351)

Competitive grants to Walpole peaked in FY2020 at $1.2 million, 31% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $23.2 million, are not shown.

EARMARKS

Walpole received $847,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$847,000	**$847,000**	**$847,000**	**Not a member**
$32.09 per resident (218th of 351)	$32.09 per resident (230th of 351)	$32.09 per resident (231st of 351)	35 municipalities had none

Placed in the town: 14 clauses in eight of ten budgets; the most recent in FY2026. Every one names Walpole directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$100,000	"the design and feasibility analysis of a new fire substation in the town of Walpole"	Enacted names the town
FY2025	$100,000	"safety improvements for pedestrian access at Walpole high school"	Enacted names the town
FY2025	$100,000	"study the feasibility of creating and implementing a quiet zone for the area abutting the Walpole commuter rail station in the town of Walpole"	Enacted names the town
FY2023	$100,000	"the restoration of the Historic Old Walpole Town Hall for future economic opportunities and business growth"	Enacted names the town
FY2025	$85,000	"refurbish and maintain the old town hall in the town of Walpole"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Walpole received 61% of its proportional share of competitive grant awards.

Local road miles **125.3** 55th of 351 · 4.8 per 1,000 residents (248th of 351)	Town-owned bridges, replacement cost **$11.2M** scored exposure $4.1M · one in poor condition	Road-stream crossings **111** 93rd of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **20.5 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **26,491** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.61; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **135 acres** 1.0% of land area · FY2026	State-owned land PILOT, FY2026 **$130,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$959** statewide $117 · FY2026	New growth per resident **$25,112** FY2017–2025 · 137th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.3% of Walpole's general-fund spending in FY2025, down from 14.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.0%** $8.2M of $58.5M · median town 14.1%	FY2016 **12.6%** $10.3M of $82.1M · median town 12.2%	FY2025 **11.3%** $13.9M of $123M · median town 11.5%	Net of state charges, FY2025 **10.0%** FY2010: 12.7% · median town 10.0%

Walpole's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $523,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Walpole's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 9.6% above its FY2006 aid grown by Boston-area consumer prices and 2.6% below grown by the government price index.

Gross state aid went from $8.2 million in FY2006 to $13.9 million in FY2025, +69.9% in dollars. Flag: in FY2010, $255,000 of Walpole's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+33.2%** $8.5M to $11.3M · all towns +54.0%	All fixed costs, FY2016–25 **+41.6%** $14.7M to $20.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Walpole's health insurance would have been $10.6 million in FY2025; it was $11.3 million, $707,000 above the path. Its fixed costs would have been $18.4 million in FY2025; it was $20.9 million, $2.47 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Walpole came to $697,000, 24.8% of the $2.81 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$697,000	24.8%	28.2%
Placed in the town	$697,000	24.8%	42.3%
Everything placed	$697,000	24.8%	45.2%

SCHOOLS

Walpole's required school contribution is 2.6% of median household income, 184th highest of 351.

Chapter 70 aid, FY2026 **$11.3M** to the town's district	Required local contribution **$42M** FY2026
Share of household income **2.6%** 184th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Walpole runs its own school district and also belongs to Tri County and Norfolk County; Walpole accounts for 9% and 8% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Walpole received $4.8 million in earmarks placed in the town and competitive grants over ten years, 56% of the $8.6 million its size, need and institutions predict.

PEERS

Walpole ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Walpole this town	**30**	**$6,864**	**$139**	**$32.09**	**0.61**	**2.6%**
Reading peer	35	$8,102	$118	$31.24	1.27	2.6%
Acton peer	40	$9,929	$351	$51.13	2.12	3.1%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Westford peer	45	$10,874	$400	$41.76	1.34	2.9%
North Reading peer	38	$8,458	$326	$76.44	0.68	3.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Waltham

City · Middlesex County · 64,902 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Middlesex · Thomas M. Stanley
67% of residents

10th Middlesex · John J. Lawn, Jr. 33% of residents

Waltham is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Third Middlesex · Michael J. Barrett

SCHOOL DISTRICTS

Waltham Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Waltham scores 28 on the Fairness Index for all state aid and 18 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

330th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	27	33	28

Rank under other weightings: 290th to 341st.

Stable low: below 45 under every weighting

Waltham received less than its share of state aid on all four measures; its blended score of 28 stays between 26 and 29 under every weighting tested.

DISCRETIONARY MONEY ONLY

18 / 100

321st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
17	20	15	21

Rank under other weightings: 314th to 327th.

Stable low: below 45 under every weighting

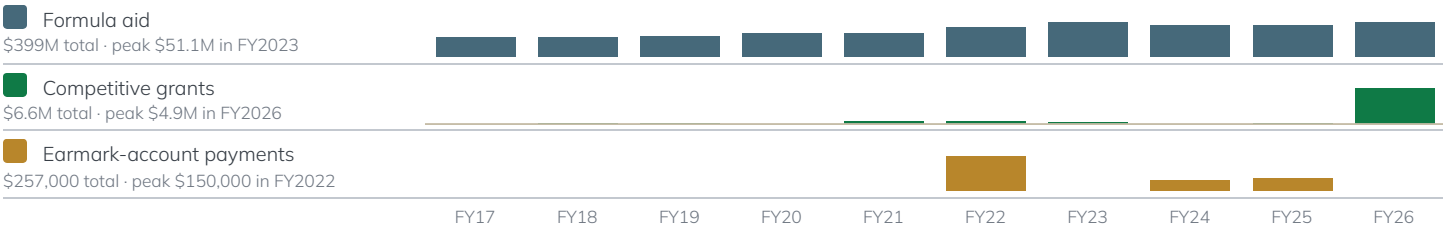
Waltham received less than its share of discretionary money on all four measures; its blended score of 18 stays between 17 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Waltham's town government and school districts received $399 million in formula aid and $6.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$399M	**$6.6M**	**$257,000**
$6,149 per resident (331st of 351) · gross	$102 per resident (324th of 351)	$3.96 per resident (301st of 351)

Competitive grants to Waltham peaked in FY2026 at $4.9 million, 74% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $73.8 million, are not shown.

EARMARKS

Waltham received $3.6 million in local earmarks naming the town, $3.6 million placed in the town and $3.8 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.6M	**$3.6M**	**$3.8M**	**Not a member**
$54.73 per resident (132nd of 351)	$54.73 per resident (155th of 351)	$58.58 per resident (150th of 351)	35 municipalities had none

Placed in the town: 55 clauses in ten of ten budgets; the most recent in FY2026. $3.3 million came in clauses that name Waltham; the other $250,000 went to organizations based in Waltham, some of which serve a wider area.

Names the town includes $250,000 in clauses that name Waltham but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $250,000 in one clause for state facilities located in Waltham (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$156,000	"the installation of a wireless coordination system for 39 identified traffic signals in the city of Waltham"	Enacted names the town
FY2025	$150,000	"Healthy Waltham, Inc"	Enacted names the town
FY2022	$150,000	"the revitalization and dredging of Purgatory cove in the city of Waltham"	Enacted names the town
FY2024	$100,000	"the development and design of upgrades to the Hardy pond outlet weir with automatic controls to improve water quality in the pond and reduce..."	Enacted names the town
FY2022	$100,000	"Healthy Waltham, Inc"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Waltham received 45% of its proportional share of competitive grant awards.

Local road miles **113.5** 70th of 351 · 1.7 per 1,000 residents (339th of 351)	Town-owned bridges, replacement cost **$48.4M** scored exposure $26.8M · 2.5 in poor condition	Road-stream crossings **86** 152nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.7 sq mi** 4% state-owned	Seasonal homes **0%** share of housing units	Peak service population **65,121** residents plus seasonal	Core infrastructure index **0.71** roads, culverts, dams, coast, flood, energy

Burden index 0.45; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **31 acres** 0.4% of land area · FY2026	State-owned land PILOT, FY2026 **$7,918** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$257** statewide $117 · FY2026	New growth per resident **$41,633** FY2017–2025 · 53rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.3% of Waltham's general-fund spending in FY2025, the same share as in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.3%** $17.9M of $158M · median town 14.1%	FY2016 **8.6%** $19.1M of $222M · median town 12.2%	FY2025 **11.3%** $36.5M of $322M · median town 11.5%	Net of state charges, FY2025 **10.6%** FY2010: 8.9% · median town 10.0%

Waltham's state aid kept pace with both price measures: FY2025 aid was 31.3% above its FY2006 aid grown by Boston-area consumer prices and 16.7% above grown by the government price index.

Gross state aid went from $17.9 million in FY2006 to $36.5 million in FY2025, +103.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.3%** $49.6M to $73.6M · all towns +54.0%	All fixed costs, FY2016–25 **+47.9%** $60.7M to $89.8M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Waltham's health insurance would have been $62 million in FY2025; it was $73.6 million, $11.6 million above the path. Its fixed costs would have been $75.8 million in FY2025; it was $89.8 million, $13.9 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Waltham came to $3.3 million, 13.9% of the $24 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$3.3M	13.9%	28.2%
Placed in the town	$3.3M	13.8%	42.3%
Everything placed	$3.6M	14.8%	45.2%

SCHOOLS

Waltham's required school contribution is 2.8% of median household income, 130th highest of 351.

Chapter 70 aid, FY2026 **$26.4M** to the town's district	Required local contribution **$85.5M** FY2026
Share of household income **2.8%** 130th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+68%** after inflation

Waltham runs its own school district.

EXPECTED AND ACTUAL

Waltham received $15.4 million in earmarks placed in the town and competitive grants over ten years, 69% of the $22.5 million its size, need and institutions predict.

PEERS

Waltham ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Waltham this town	**28**	**$6,149**	**$102**	**$54.73**	**0.45**	**2.8%**
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Plymouth peer	28	$7,006	$268	$53.91	0.73	3.0%
Medford peer	32	$6,237	$331	$49.53	2.03	1.9%
Brookline peer	21	$5,242	$48.41	$69.97	0.36	2.0%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Ware

Town · Hampshire County · 10,048 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola 67% of residents
5th Worcester · Donald R. Berthiaume, Jr. 33% of residents

Ware is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS

Ware Public Schools, the town's own district
Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, Monson, New Braintree, Oakham, Palmer and Warren

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Ware scores 61 on the Fairness Index for all state aid and 72 for discretionary money. Fifty is a fair share.

ALL STATE AID

61 / 100

43rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	53	62	63

Rank under other weightings: 34th to 52nd.

Stable high: above 55 under every weighting

Ware received more than its share of state aid on all four measures; its blended score of 61 stays between 59 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

72 / 100

99th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
75	65	76	73

Rank under other weightings: 90th to 111th.

Stable high: above 55 under every weighting

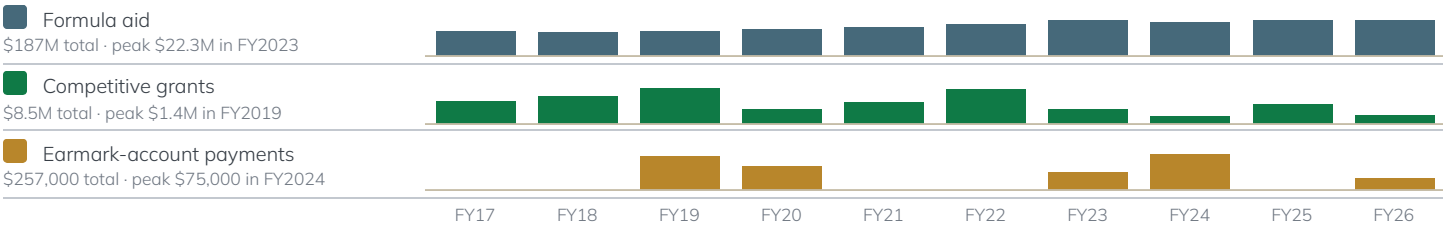
Ware received more than its share of discretionary money on all four measures; its blended score of 72 stays between 70 and 74 under every weighting tested.

STATE MONEY, FY2017–FY2026

Ware's town government and school districts received $187 million in formula aid and $8.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$187M	**$8.5M**	**$257,000**
$18,604 per resident (40th of 351) · gross	$846 per resident (89th of 351)	$25.58 per resident (172nd of 351)

Competitive grants to Ware were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.4 million, are not shown.

EARMARKS

Ware received $50,000 in local earmarks naming the town, $225,000 placed in the town and $225,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	**$225,000**	**$225,000**	**Not a member**
$4.98 per resident (305th of 351)	$22.39 per resident (268th of 351)	$22.39 per resident (269th of 351)	35 municipalities had none

Placed in the town: seven clauses in five of ten budgets; the most recent in FY2026. $50,000 came in clauses that name Ware; the other $175,000 went to organizations based in Ware, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$50,000	"The Quaboag Valley Community Development Corporation"	Enacted recipient based here
FY2019	$50,000	"the Quaboag Valley Community Development Corporation"	Enacted recipient based here
FY2017	$50,000	"the establishment of a regional adult learning center by the Quaboag Valley Community Development Corporation"	Enacted recipient based here
FY2026	$25,000	"the Quaboag Valley Community Development Corporation for the Quaboag Connector"	Enacted recipient based here
FY2026	$25,000	"the Ware River Valley Domestic Violence Task Force in the town of Ware"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Ware received about its proportional share of competitive grant awards.

Local road miles **85.8** 133rd of 351 · 8.5 per 1,000 residents (128th of 351)	Town-owned bridges, replacement cost **$18.7M** scored exposure $6.6M · three in poor condition	Road-stream crossings **120** 78th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **34.4 sq mi** 23% state-owned	Seasonal homes **1%** share of housing units	Peak service population **10,132** residents plus seasonal	Core infrastructure index **1.32** roads, culverts, dams, coast, flood, energy

Burden index 1.01; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **952 acres** 4.3% of land area · FY2026	State-owned land PILOT, FY2026 **$49,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$51.86** statewide $117 · FY2026	New growth per resident **$6,604** FY2017–2025 · 346th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 43.7% of Ware's general-fund spending in FY2025, down from 44.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **44.5%** $10.3M of $23.2M · median town 14.1%	FY2016 **42.2%** $11.8M of $27.9M · median town 12.2%	FY2025 **43.7%** $16.7M of $38.3M · median town 11.5%	Net of state charges, FY2025 **40.1%** FY2010: 36.7% · median town 10.0%

Ware's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Ware's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 4.7% above its FY2006 aid grown by Boston-area consumer prices and 6.9% below grown by the government price index.

Gross state aid went from $10.3 million in FY2006 to $16.7 million in FY2025, +62.4% in dollars. Flag: in FY2010, $1.2 million of Ware's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+24.5%** $3.3M to $4.1M · all towns +54.0%	All fixed costs, FY2016–25 **+39.7%** $5.4M to $7.5M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Ware's health insurance would have been $4.06 million in FY2025; it was $4.05 million, $12,000 below the path. Its fixed costs would have been $6.74 million in FY2025; it was $7.54 million, $799,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Ware came to $25,000, 3.1% of the $797,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	3.1%	28.2%
Placed in the town	$175,000	21.9%	42.3%
Everything placed	$175,000	21.9%	45.2%

SCHOOLS

Ware's required school contribution is 2.4% of median household income, 253rd highest of 351.

Chapter 70 aid, FY2026 **$16.4M** to the town's district	Required local contribution **$7.2M** FY2026
Share of household income **2.4%** 253rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+29%** after inflation

Ware runs its own school district and also belongs to Pathfinder; Ware accounts for 17% of that district's foundation budget.

EXPECTED AND ACTUAL

Ware received $8.7 million in earmarks placed in the town and competitive grants over ten years, 10% more than the $7.9 million its size, need and institutions predict.

PEERS

Ware ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Ware this town	**61**	**$18,604**	**$846**	**$22.39**	**1.01**	**2.4%**
Winchendon peer	62	$18,732	$518	$42.62	1.52	2.6%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
Adams peer	64	$19,320	$1,327	$27.87	2.22	2.2%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Orange peer	66	$23,109	$1,214	$123	2.59	3.0%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Wareham

Town · Plymouth County · 23,302 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Plymouth · John R. Gaskey

STATE SENATE
Third Bristol and Plymouth · Kelly A. Dooner

SCHOOL DISTRICTS
Wareham Public Schools, the town's own district
Upper Cape Cod Regional Vocational Technical School District, vocational, shared with Bourne, Falmouth, Marion and Sandwich

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Wareham scores 47 on the Fairness Index for all state aid and 70 for discretionary money. Fifty is a fair share.

ALL STATE AID

47 / 100

147th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	44	49	51

Rank under other weightings: 121st to 173rd.

Near fair: between 45 and 55 under every weighting

Wareham received less than its share of state aid on three of four measures; its blended score of 47 stays between 45 and 49 under every weighting tested.

DISCRETIONARY MONEY ONLY

70 / 100

106th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
71	71	63	76

Rank under other weightings: 96th to 117th.

Stable high: above 55 under every weighting

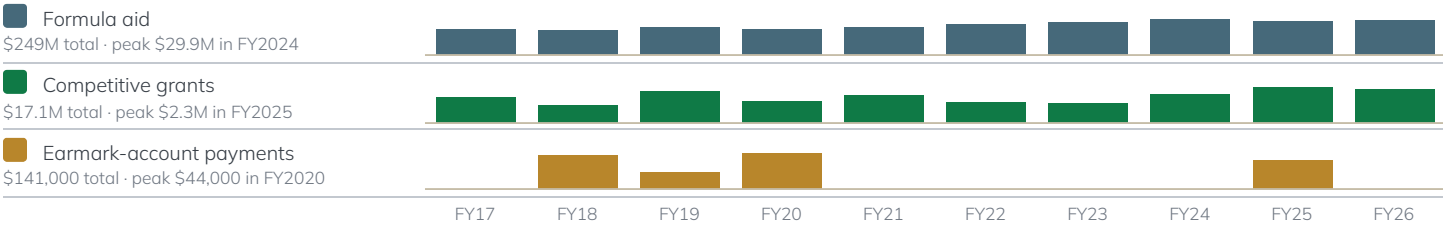
Wareham received more than its share of discretionary money on all four measures; its blended score of 70 stays between 68 and 72 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wareham's town government and school districts received $249 million in formula aid and $17.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$249M	$17.1M	$141,000
$10,699 per resident (156th of 351) · gross	$733 per resident (107th of 351)	$6.06 per resident (279th of 351)

Competitive grants to Wareham were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $24.1 million, are not shown.

EARMARKS

Wareham received $422,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$422,000	$422,000	$422,000	Not a member
$18.13 per resident (271st of 351)	$18.13 per resident (281st of 351)	$18.13 per resident (281st of 351)	35 municipalities had none

Placed in the town: 12 clauses in ten of ten budgets; the most recent in FY2026. Every one names Wareham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"the construction of the new Damien's Place food pantry in the town of Wareham"	Enacted names the town
FY2021	$62,000 (split two ways)	"equally to the school systems of the towns of Middleborough and Wareham to provide necessary technology for distance learning for underserved…"	Enacted names the town
FY2017	$55,000	"the operations of the Council on Aging in the town of Wareham"	Enacted names the town
FY2023	$40,000	"enhance services at the Wareham council on aging"	Enacted names the town
FY2026	$25,000 (split four ways)	"and divided equally to Grit & Grace Sober Living For Women in the city of Attleboro, Jeffrey's House in the city of Fitchburg, Evergreen House, Inc.…."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wareham received 30% of its proportional share of competitive grant awards.

Local road miles **128.3** 52nd of 351 · 5.5 per 1,000 residents (211th of 351)	Town-owned bridges, replacement cost **$9.3M** scored exposure $2.1M · one in poor condition	Road-stream crossings **237** 4th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **35.8 sq mi** 6% state-owned	Seasonal homes **16%** share of housing units	Peak service population **27,744** residents plus seasonal	Core infrastructure index **0.27** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,345 acres** 5.9% of land area · FY2026	State-owned land PILOT, FY2026 **$202,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$150** statewide $117 · FY2026	New growth per resident **$19,894** FY2017–2025 · 186th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 25.2% of Wareham's general-fund spending in FY2025, down from 29.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **29.8%** $14.8M of $49.7M · median town 14.1%	FY2016 **26.4%** $15.2M of $57.7M · median town 12.2%	FY2025 **25.2%** $20.9M of $83M · median town 11.5%	Net of state charges, FY2025 **17.0%** FY2010: 27.1% · median town 10.0%

Wareham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wareham's state aid did not keep pace with either price measure: FY2025 aid was 8.8% below its FY2006 aid grown by Boston-area consumer prices and 19.0% below grown by the government price index.

Gross state aid went from $14.8 million in FY2006 to $20.9 million in FY2025, +41.4% in dollars. Flag: in FY2010, $1.2 million of Wareham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+5.1%** $7.7M to $8.1M · all towns +54.0%	All fixed costs, FY2016–25 **+33.6%** $11.8M to $15.7M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wareham's health insurance would have been $9.67 million in FY2025; it was $8.13 million, $1.53 million below the path. Its fixed costs would have been $14.7 million in FY2025; it was $15.7 million, $1.03 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wareham came to $398,000, 100.5% of the $396,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$398,000	100.5%	28.2%
Placed in the town	$398,000	100.5%	42.3%
Everything placed	$398,000	100.5%	45.2%

SCHOOLS

Wareham's required school contribution is 2.9% of median household income, 94th highest of 351.

Chapter 70 aid, FY2026 **$18.9M** to the town's district	Required local contribution **$27.6M** FY2026
Share of household income **2.9%** 94th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+19%** after inflation

Wareham runs its own school district and also belongs to Upper Cape Cod; Wareham accounts for 28% of that district's foundation budget.

EXPECTED AND ACTUAL

Wareham received $18 million in earmarks placed in the town and competitive grants over ten years, 48% more than the $12.1 million its size, need and institutions predict.

PEERS

Wareham ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wareham this town	**47**	**$10,699**	**$733**	**$18.13**	**0.30**	**2.9%**
Hudson peer	42	$10,896	$229	$66.49	0.91	3.1%
Winthrop peer · best in class of 30	40	$8,903	$365	$158	0.60	2.4%
Amesbury peer	39	$9,706	$676	$64.69	2.17	2.8%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Stoughton peer	43	$10,942	$402	$41.94	0.88	3.0%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Warren

Town · Worcester County · 5,009 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampden · Todd M. Smola

STATE SENATE

Hampden, Hampshire and Worcester · Jacob R. Oliveira

SCHOOL DISTRICTS

Quaboag Regional School District, shared with West Brookfield
Pathfinder Regional Vocational Technical School District, vocational, shared with Belchertown, Granby, Hardwick, Monson, New Braintree, Oakham, Palmer and Ware

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Warren scores 67 on the Fairness Index for all state aid and 91 for discretionary money. Fifty is a fair share.

ALL STATE AID

67 / 100

19th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
70	60	68	69

Rank under other weightings: 18th to 26th.

Stable high: above 55 under every weighting

Warren received more than its share of state aid on all four measures; its blended score of 67 stays between 65 and 68 under every weighting tested.

DISCRETIONARY MONEY ONLY

91 / 100

42nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
92	88	92	91

Rank under other weightings: 34th to 45th.

Stable high: above 55 under every weighting

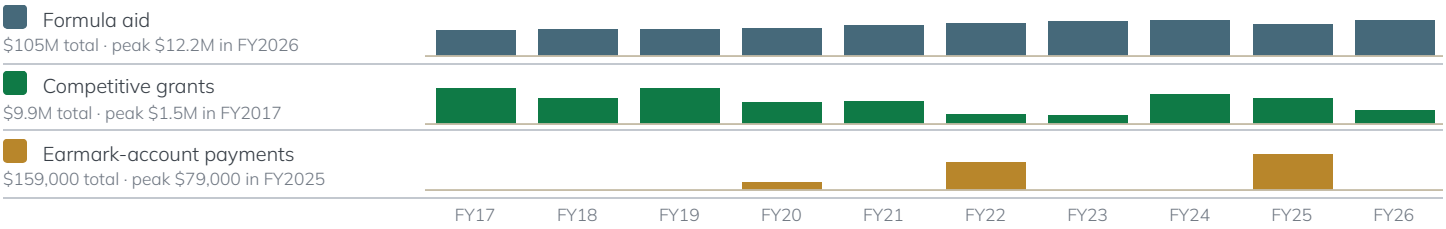
Warren received more than its share of discretionary money on all four measures; its blended score of 91 stays between 90 and 91 under every weighting tested.

STATE MONEY, FY2017–FY2026

Warren's town government and school districts received $105 million in formula aid and $9.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$105M	**$9.9M**	**$159,000**
$20,879 per resident (22nd of 351) · gross	$1,969 per resident (47th of 351)	$31.70 per resident (142nd of 351)

Competitive grants to Warren were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $6.3 million, are not shown.

EARMARKS

Warren received $55,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$55,000	**$55,000**	**$55,000**	**Not a member**
$10.98 per resident (299th of 351)	$10.98 per resident (307th of 351)	$10.98 per resident (308th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2025. Every one names Warren directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"improvements to the Warren senior center in Warren"	Enacted names the town
FY2020	$5,000	"improvements to Lucy Stone park in the town of Warren"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Warren received 1.67 times its proportional share of competitive grant awards.

Local road miles **63.2** 210th of 351 · 12.6 per 1,000 residents (80th of 351)	Town-owned bridges, replacement cost **$12.2M** scored exposure $4.2M · two in poor condition	Road-stream crossings **141** 53rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **27.5 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **5,009** residents plus seasonal	Core infrastructure index **1.89** roads, culverts, dams, coast, flood, energy

Burden index 1.67; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **212 acres** 1.2% of land area · FY2026	State-owned land PILOT, FY2026 **$8,999** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$42.45** statewide $117 · FY2026	New growth per resident **$15,216** FY2017–2025 · 250th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.4% of Warren's general-fund spending in FY2025, down from 17.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.1%** $1.1M of $6.7M · median town 14.1%	FY2016 **11.5%** $942,000 of $8.2M · median town 12.2%	FY2025 **10.4%** $1.2M of $11.9M · median town 11.5%	Net of state charges, FY2025 **10.1%** FY2010: 13.1% · median town 10.0%

Warren's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $7.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Warren's state aid did not keep pace with either price measure: FY2025 aid was 30.4% below its FY2006 aid grown by Boston-area consumer prices and 38.2% below grown by the government price index.

Gross state aid went from $1.1 million in FY2006 to $1.2 million in FY2025, +7.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+23.6%** $434,000 to $536,000 · all towns +54.0%	All fixed costs, FY2016–25 **+67.0%** $824,000 to $1.4M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Warren's health insurance would have been $542,000 in FY2025; it was $536,000, $5,482 below the path. Its fixed costs would have been $1.03 million in FY2025; it was $1.38 million, $347,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Warren came to $55,000, 53.6% of the $103,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$55,000	53.6%	28.2%
Placed in the town	$55,000	53.6%	42.3%
Everything placed	$55,000	53.6%	45.2%

SCHOOLS

Warren's required school contribution is 2.5% of median household income, 220th highest of 351.

Chapter 70 aid, FY2026 **$8.2M** attributed to the town	Required local contribution **$3.6M** FY2026
Share of household income **2.5%** 220th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+18%** after inflation

EXPECTED AND ACTUAL

Warren received $10 million in earmarks placed in the town and competitive grants over ten years, 38% more than the $7.2 million its size, need and institutions predict.

Warren has no school district of its own. Its pupils attend Warren, Quaboag and Pathfinder; Warren accounts for 100%, 60% and 8% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Warren ranks 10th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Warren this town	**67**	**$20,879**	**$1,969**	**$10.98**	**1.67**	**2.5%**
Cheshire peer	55	$14,188	$1,187	$49.75	2.39	2.8%
North Brookfield peer	56	$15,678	$1,128	$7.35	0.87	2.9%
Montague peer	55	$14,528	$1,282	$26.53	2.38	2.7%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Hardwick peer	63	$20,446	$849	$101	2.32	2.5%
Greenfield best in class of 30	53	$14,180	$1,705	$134	4.81	2.9%
Granville lowest in class of 30	50	$11,112	$2,359	$0	0.73	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Warwick

Town · Franklin County · 776 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
2nd Franklin · Susannah M. Whipps

STATE SENATE
Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS
Warwick Public Schools, the town's own district
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Warwick scores 52 on the Fairness Index for all state aid and 91 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

106th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	57	39	54

Rank under other weightings: 80th to 129th.

Weighting-dependent: the range crosses the 45–55 band

Warwick received more than its share of state aid on three of four measures; its blended score of 52 stays between 49 and 56 under every weighting tested.

DISCRETIONARY MONEY ONLY

91 / 100

38th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
94	93	86	92

Rank under other weightings: 37th to 40th.

Stable high: above 55 under every weighting

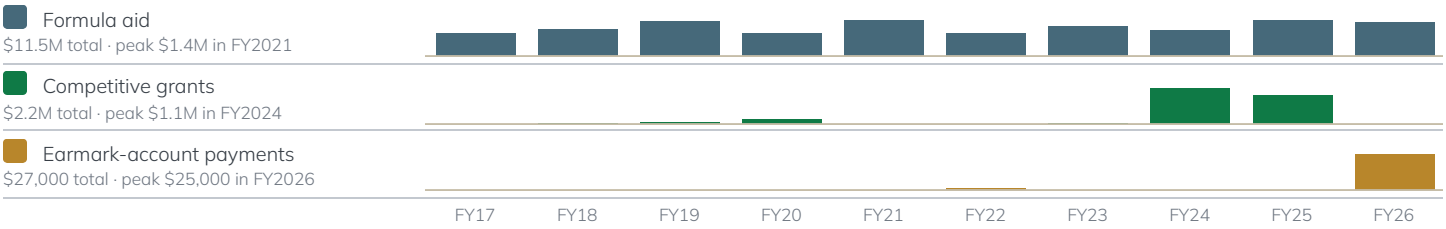
Warwick received more than its share of discretionary money on all four measures; its blended score of 91 stays between 90 and 93 under every weighting tested.

STATE MONEY, FY2017–FY2026

Warwick's town government and school districts received $11.5 million in formula aid and $2.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.5M	**$2.2M**	**$27,000**
$14,769 per resident (76th of 351) · gross	$2,887 per resident (35th of 351)	$34.72 per resident (131st of 351)

Competitive grants to Warwick peaked in FY2024 at $1.1 million, 48% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 776 residents, a single payment moves Warwick's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.9 million, are not shown.

EARMARKS

Warwick received $50,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	**$50,000**	**$50,000**	**Not a member**
$64.43 per resident (101st of 351)	$64.43 per resident (130th of 351)	$64.43 per resident (136th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2024. Every one names Warwick directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$50,000	"the Warwick fire department for funding or reimbursement for facility repair and upgrades"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Warwick received 2.79 times its proportional share of competitive grant awards.

Local road miles **55.4** 228th of 351 · 71.4 per 1,000 residents (10th of 351)	Town-owned bridges, replacement cost **$3.4M** scored exposure $848,000 · two in poor condition	Road-stream crossings **68** 203rd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **37.3 sq mi** 48% state-owned	Seasonal homes **9%** share of housing units	Peak service population **857** residents plus seasonal	Core infrastructure index **5.04** roads, culverts, dams, coast, flood, energy

Burden index 2.79; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **11,879 acres** 49.7% of land area · FY2026	State-owned land PILOT, FY2026 **$174,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$14.65** statewide $117 · FY2026	New growth per resident **$11,447** FY2017–2025 · 299th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

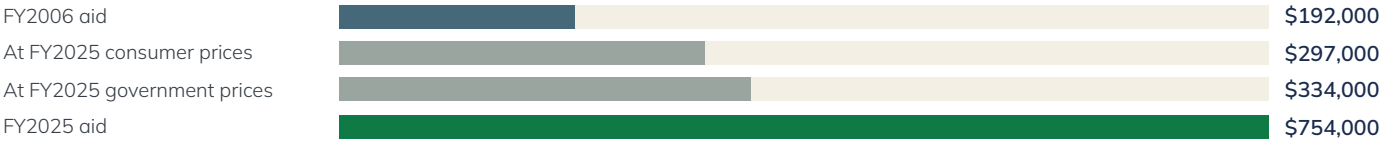
State aid covered 26.2% of Warwick's general-fund spending in FY2025, up from 11.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.6%** $192,000 of $1.7M · median town 14.1%	FY2016 **13.7%** $239,000 of $1.7M · median town 12.2%	FY2025 **26.2%** $754,000 of $2.9M · median town 11.5%	Net of state charges, FY2025 **23.5%** FY2010: 14.2% · median town 10.0%

Warwick's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $32,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Warwick's state aid kept pace with both price measures: FY2025 aid was 153.7% above its FY2006 aid grown by Boston-area consumer prices and 125.5% above grown by the government price index.



Gross state aid went from $192,000 in FY2006 to $754,000 in FY2025, +293.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+152.2%** $44,000 to $111,000 · all towns +54.0%	All fixed costs, FY2016–25 **+189.3%** $89,000 to $258,000 · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Warwick's health insurance would have been $55,000 in FY2025; it was $111,000, $56,000 above the path. Its fixed costs would have been $111,000 in FY2025; it was $258,000, $146,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2017 (+71%); health insurance changed by more than 30% in one year in FY2017 (+50%) and FY2024 (+38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Warwick came to $50,000, 74.5% of the $67,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	74.5%	28.2%
Placed in the town	$50,000	74.5%	42.3%
Everything placed	$50,000	74.5%	45.2%

SCHOOLS

Warwick's required school contribution is 1.7% of

EXPECTED AND ACTUAL

Warwick received $2.3 million in earmarks placed in the town and competitive grants over ten years,

median household income, 325th highest of 351.

Chapter 70 aid, FY2026 **$412,000** to the town's district	Required local contribution **$584,000** FY2026
Share of household income **1.7%** 325th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+20%** after inflation

Warwick runs its own school district and also belongs to Franklin County; Warwick accounts for 1% of that district's foundation budget.

about the $2.3 million its size, need and institutions predict.

PEERS

Warwick ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Warwick this town	**52**	**$14,769**	**$2,887**	**$64.43**	**2.79**	**1.7%**
Heath peer	70	$20,313	$6,568	$65.36	0.84	1.5%
Gill peer	40	$9,063	$224	$50.29	0.47	2.3%
Clarksburg peer	65	$21,258	$932	$15.00	3.56	2.1%
Wales peer	59	$16,913	$776	$88.28	0.37	2.1%
Florida peer · lowest in class of 30	64	$19,543	$1,744	$0	0.14	3.2%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Washington

Town · Berkshire County · 526 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Central Berkshire Regional School District, shared with Becket, Cummington, Dalton, Hinsdale, Peru and Windsor

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Washington scores 56 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

70th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
65	68	34	57

Rank under other weightings: 39th to 114th.

Weighting-dependent: the range crosses the 45–55 band

Washington received more than its share of state aid on three of four measures; its blended score of 56 stays between 50 and 62 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

16th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	98	89	97

Rank under other weightings: 12th to 19th.

Stable high: above 55 under every weighting

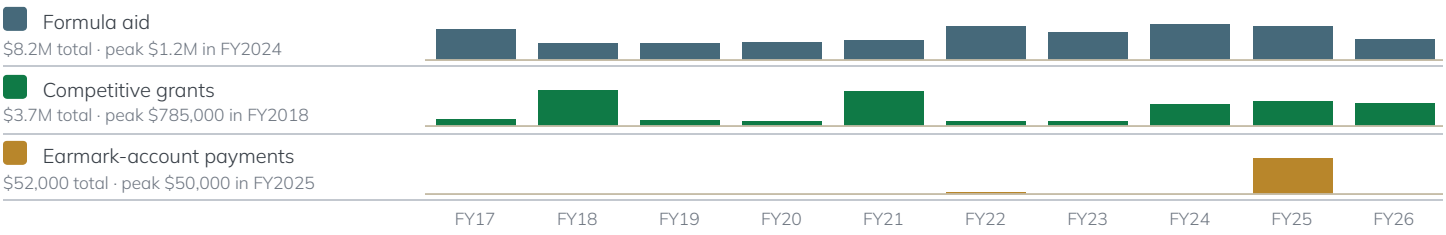
Washington received more than its share of discretionary money on all four measures; its blended score of 96 stays between 94 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Washington's town government and school districts received $8.2 million in formula aid and $3.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$8.2M	$3.7M	$52,000
$15,534 per resident (67th of 351) · gross	$6,984 per resident (8th of 351)	$99.80 per resident (23rd of 351)

Competitive grants to Washington peaked in FY2018 at $785,000, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 526 residents, a single payment moves Washington's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.3 million, are not shown.

EARMARKS

Washington received $50,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$50,000	$50,000	$50,000	Not a member
$95.06 per resident (56th of 351)	$95.06 per resident (76th of 351)	$95.06 per resident (86th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2025. Every one names Washington directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$50,000	"the town of Washington to acquire a vehicle for use by its police department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Washington received 1.16 times its proportional share of competitive grant awards.

Local road miles **42.2** 283rd of 351 · 80.2 per 1,000 residents (6th of 351)	Town-owned bridges, replacement cost **$5.3M** scored exposure $1.6M · four in poor condition	Road-stream crossings **78** 172nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **38.0 sq mi** 46% state-owned	Seasonal homes **12%** share of housing units	Peak service population **605** residents plus seasonal	Core infrastructure index **2.12** roads, culverts, dams, coast, flood, energy

Burden index 1.16; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **11,720 acres** 48.2% of land area · FY2026	State-owned land PILOT, FY2026 **$117,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$10.00** statewide $117 · FY2026	New growth per resident **$18,839** FY2017–2025 · 205th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 13.2% of Washington's general-fund spending in FY2025, up from 12.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.4%** $139,000 of $1.1M · median town 14.1%	FY2016 **13.8%** $205,000 of $1.5M · median town 12.2%	FY2025 **13.2%** $284,000 of $2.1M · median town 11.5%	Net of state charges, FY2025 **13.2%** FY2010: 13.1% · median town 10.0%

Washington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $315,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Washington's state aid kept pace with both price measures: FY2025 aid was 31.9% above its FY2006 aid grown by Boston-area consumer prices and 17.2% above grown by the government price index.

Gross state aid went from $139,000 in FY2006 to $284,000 in FY2025, +104.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+45.3%** $32,000 to $46,000 · all towns +54.0%	All fixed costs, FY2016–25 **+11.2%** $100,000 to $111,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Washington's health insurance would have been $40,000 in FY2025; it was $46,000, $6,504 above the path. Its fixed costs would have been $124,000 in FY2025; it was $111,000, $14,000 below the path.

Flag: health insurance changed by more than 30% in one year in FY2017 (+67%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Washington came to $50,000, 3.5 times the $14,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$50,000	3.5 times	28.2%
Placed in the town	$50,000	3.5 times	42.3%
Everything placed	$50,000	3.5 times	45.2%

SCHOOLS

Washington's required school contribution is 2.6% of

EXPECTED AND ACTUAL

Washington received $3.7 million in earmarks placed in the town and competitive grants over ten years, 2.0 times the $1.8 million its size, need and institutions predict.

median household income, 185th highest of 351.

Chapter 70 aid, FY2026 **$230,000** attributed to the town	Required local contribution **$632,000** FY2026
Share of household income **2.6%** 185th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−18%** after inflation

Washington has no school district of its own. Its pupils attend Washington and Central Berkshire; Washington accounts for 100% and 3% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Washington ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Washington this town	**56**	**$15,534**	**$6,984**	**$95.06**	**1.16**	**2.6%**
Peru peer	61	$22,437	$3,220	$39.68	1.98	2.8%
Cummington peer · lowest in class of 30	49	$9,157	$4,050	$0	1.51	1.5%
Montgomery peer	42	$9,334	$283	$45.37	0.27	2.3%
Sandisfield peer	43	$9,713	$2,087	$0	0.34	3.1%
Whately peer	45	$9,968	$1,484	$28.91	1.02	2.4%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Watertown

City · Middlesex County · 35,543 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

29th Middlesex · Steven Owens 66% of residents
10th Middlesex · John J. Lawn, Jr. 34% of residents

Watertown is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Suffolk and Middlesex · William N. Brownsberger

SCHOOL DISTRICTS

Watertown Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Watertown scores 28 on the Fairness Index for all state aid and 25 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

333rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	29	36	22

Rank under other weightings: 305th to 341st.

Stable low: below 45 under every weighting

Watertown received less than its share of state aid on all four measures; its blended score of 28 stays between 25 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

25 / 100

286th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
23	29	28	22

Rank under other weightings: 280th to 293rd.

Stable low: below 45 under every weighting

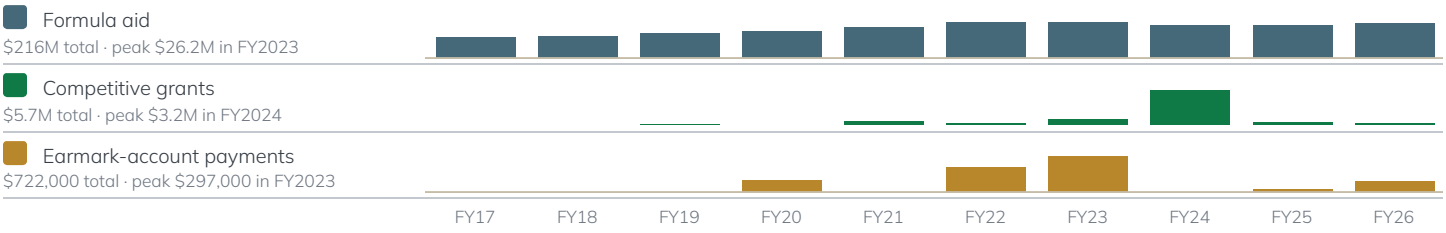
Watertown received less than its share of discretionary money on all four measures; its blended score of 25 stays between 24 and 27 under every weighting tested.

STATE MONEY, FY2017–FY2026

Watertown's town government and school districts received $216 million in formula aid and $5.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$216M	**$5.7M**	**$722,000**
$6,072 per resident (333rd of 351) · gross	$161 per resident (274th of 351)	$20.31 per resident (201st of 351)

Competitive grants to Watertown peaked in FY2024 at $3.2 million, 57% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $27.7 million, are not shown.

EARMARKS

Watertown received $1.4 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.4M	**$1.4M**	**$1.4M**	**Not a member**
$39.70 per resident (189th of 351)	$39.70 per resident (203rd of 351)	$39.70 per resident (206th of 351)	35 municipalities had none

Placed in the town: 21 clauses in nine of ten budgets; the most recent in FY2026. Every one names Watertown directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$150,000	"the Watertown Boys & Girls Club, Inc. for capital improvements"	Enacted names the town
FY2024	$125,000 (split two ways)	"a study of the Charles river, including, but not limited to, flooding mitigation impacts and fish passage improvements as it relates to potential…"	Enacted names the town
FY2024	$125,000 (split two ways)	"the Watertown housing authority for basement waterproofing and mold remediation work at Lexington Gardens"	Enacted names the town
FY2025	$100,000	"the Watertown Community Foundation, Inc. to increase access to health and human services and expand support and stabilization services for vulnerable…"	Enacted names the town
FY2024	$100,000	"the Watertown Boys' and Girls' Club, Inc. for capital improvements"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Watertown received 91% of its proportional share of competitive grant awards.

Local road miles **73.4** 178th of 351 · 2.1 per 1,000 residents (335th of 351)	Town-owned bridges, replacement cost **$2.6M** scored exposure $683,000 · none in poor condition	Road-stream crossings **12** 335th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **4.0 sq mi** 4% state-owned	Seasonal homes **1%** share of housing units	Peak service population **35,820** residents plus seasonal	Core infrastructure index **2.23** roads, culverts, dams, coast, flood, energy

Burden index 0.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$70,605** FY2017–2025 · 16th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 9.6% of Watertown's general-fund spending in FY2025, down from 14.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **14.0%** $11.4M of $81.8M · median town 14.1%	FY2016 **10.0%** $11.8M of $117M · median town 12.2%	FY2025 **9.6%** $16.6M of $172M · median town 11.5%	Net of state charges, FY2025 **7.8%** FY2010: 9.4% · median town 10.0%

Watertown's state aid did not keep pace with either price measure: FY2025 aid was 6.3% below its FY2006 aid grown by Boston-area consumer prices and 16.7% below grown by the government price index.

Gross state aid went from $11.4 million in FY2006 to $16.6 million in FY2025, +45.4% in dollars. Flag: in FY2010, $982,000 of Watertown's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+2.4%** $11.9M to $12.2M · all towns +54.0%	All fixed costs, FY2016–25 **–21.4%** $27.8M to $21.8M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Watertown's health insurance would have been $14.8 million in FY2025; it was $12.2 million, $2.66 million below the path. Its fixed costs would have been $34.7 million in FY2025; it was $21.8 million, $12.9 million below the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Watertown came to $1.4 million, 4.7 times the $290,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	4.7 times	28.2%
Placed in the town	$1.4M	4.7 times	42.3%
Everything placed	$1.4M	4.7 times	45.2%

SCHOOLS

Watertown's required school contribution is 1.8% of median household income, 322nd highest of 351.

Chapter 70 aid, FY2026 **$8.5M** to the town's district	Required local contribution **$37.4M** FY2026
Share of household income **1.8%** 322nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+26%** after inflation

Watertown runs its own school district.

EXPECTED AND ACTUAL

Watertown received $8.7 million in earmarks placed in the town and competitive grants over ten years, 56% of the $15.5 million its size, need and institutions predict.

PEERS

Watertown ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Watertown this town	**28**	**$6,072**	**$161**	**$39.70**	**0.91**	**1.8%**
Brookline peer	21	$5,242	$48.41	$69.97	0.36	2.0%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Woburn peer	31	$6,812	$255	$85.93	0.44	3.5%
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
Harwich peer · lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Wayland

Town · Middlesex County · 13,914 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Middlesex · Carmine Lawrence Gentile
51% of residents
5th Middlesex · David Paul Linsky
49% of residents
Wayland is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Middlesex and Worcester · James B. Eldridge

SCHOOL DISTRICTS

Wayland Public Schools, the town's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Wayland scores 33 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

33 / 100
281st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	53	23	22

Rank under other weightings: 243rd to 323rd.

Stable low: below 45 under every weighting

Wayland received less than its share of state aid on three of four measures; its blended score of 33 stays between 27 and 39 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100
172nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	70	54	37

Rank under other weightings: 150th to 193rd.

Weighting-dependent: the range crosses the 45–55 band

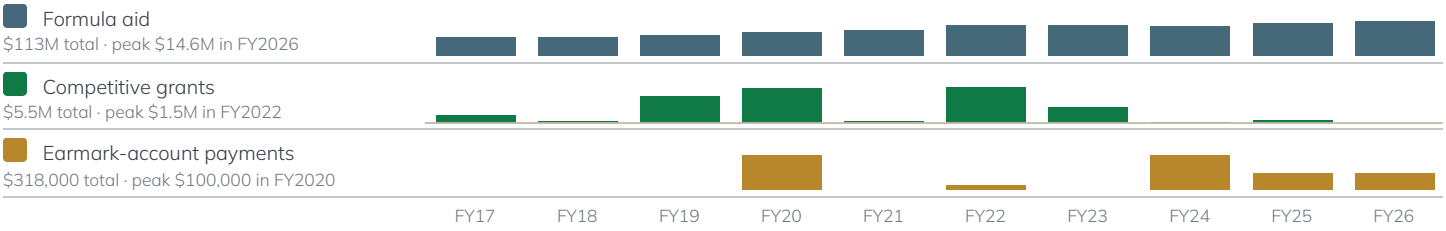
Wayland received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 48 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wayland's town government and school districts received $113 million in formula aid and $5.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$113M	**$5.5M**	**$318,000**
$8,090 per resident (250th of 351) · gross	$399 per resident (172nd of 351)	$22.82 per resident (186th of 351)

Competitive grants to Wayland peaked in FY2022 at $1.5 million, 27% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.8 million, are not shown.

EARMARKS

Wayland received $566,000 in local earmarks naming the town, $716,000 placed in the town and $716,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$566,000	**$716,000**	**$716,000**	**Not a member**
$40.67 per resident (184th of 351)	$51.45 per resident (166th of 351)	$51.45 per resident (171st of 351)	35 municipalities had none

Placed in the town: 16 clauses in nine of ten budgets; the most recent in FY2026. $566,000 came in clauses that name Wayland; the other $150,000 went to organizations based in Wayland, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"MassEnergize, Inc. to support programs to reduce greenhouse gas emissions in the town of Wayland"	Enacted names the town
FY2022	$100,000	"MassEnergize, Inc. for its web platform, local decarbonization efforts and staffing ; and"	Enacted recipient based here
FY2025	$50,000	"MassEnergize, Inc. to support programs for climate resilience and clean energy in the Metrowest region"	Enacted recipient based here
FY2025	$50,000	"Wayland Community Pool, Inc. for facilities improvements"	Enacted names the town
FY2020	$50,000	"the town of Wayland to improve community playground space"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wayland received 1.55 times its proportional share of competitive grant awards.

Local road miles **88.1** 125th of 351 · 6.3 per 1,000 residents (181st of 351)	Town-owned bridges, replacement cost **$10.8M** scored exposure $4.1M · 0.5 in poor condition	Road-stream crossings **70** 196th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **15.0 sq mi** 4% state-owned	Seasonal homes **1%** share of housing units	Peak service population **14,089** residents plus seasonal	Core infrastructure index **0.93** roads, culverts, dams, coast, flood, energy

Burden index 1.55; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **51 acres** 0.5% of land area · FY2026	State-owned land PILOT, FY2026 **$161,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$3,185** statewide $117 · FY2026	New growth per resident **$24,974** FY2017–2025 · 139th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.7% of Wayland's general-fund spending in FY2025, down from 9.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.1%** $4.6M of $50.5M · median town 14.1%	FY2016 **6.6%** $4.7M of $70.9M · median town 12.2%	FY2025 **8.7%** $8.9M of $102M · median town 11.5%	Net of state charges, FY2025 **8.5%** FY2010: 7.5% · median town 10.0%

Wayland's state aid kept pace with both price measures: FY2025 aid was 25.2% above its FY2006 aid grown by Boston-area consumer prices and 11.3% above grown by the government price index.

Gross state aid went from $4.6 million in FY2006 to $8.9 million in FY2025, +94.1% in dollars. Flag: in FY2010, $370,000 of Wayland's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+49.4%** $6.6M to $9.8M · all towns +54.0%	All fixed costs, FY2016–25 **+53.2%** $11.8M to $18.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wayland's health insurance would have been $8.23 million in FY2025; it was $9.84 million, $1.61 million above the path. Its fixed costs would have been $14.8 million in FY2025; it was $18.1 million, $3.35 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wayland came to $541,000, 16.6% of the $3.25 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$541,000	16.6%	28.2%
Placed in the town	$691,000	21.2%	42.3%
Everything placed	$691,000	21.2%	45.2%

SCHOOLS

Wayland's required school contribution is 2.6% of median household income, 204th highest of 351.

Chapter 70 aid, FY2026 **$7.9M** to the town's district	Required local contribution **$29M** FY2026
Share of household income **2.6%** 204th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+42%** after inflation

Wayland runs its own school district.

EXPECTED AND ACTUAL

Wayland received $6.7 million in earmarks placed in the town and competitive grants over ten years, 37% more than the $4.9 million its size, need and institutions predict.

PEERS

Wayland ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wayland this town	**33**	**$8,090**	**$399**	**$51.45**	**1.55**	**2.6%**
Hanover peer	38	$9,140	$220	$18.83	0.60	2.8%
Ipswich peer	28	$6,449	$237	$49.75	0.55	2.3%
Lynnfield peer	30	$7,167	$206	$147	0.81	3.0%
Northborough peer	35	$8,121	$93.72	$29.37	0.29	3.0%
Duxbury peer	34	$8,178	$182	$32.03	1.56	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Webster

Town · Worcester County · 17,748 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

18th Worcester · Joseph D. McKenna

STATE SENATE

Worcester and Hampden · Ryan C. Fattman

SCHOOL DISTRICTS

Webster Public Schools, the town's own district

Southern Worcester County Regional Vocational School District, vocational, shared with Auburn, Charlton, Dudley, North Brookfield, Oxford, Paxton, Rutland, Southbridge and one other

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Webster scores 55 on the Fairness Index for all state aid and 77 for discretionary money. Fifty is a fair share.

ALL STATE AID

55 / 100

79th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
56	46	59	60

Rank under other weightings: 57th to 109th.

Weighting-dependent: the range crosses the 45–55 band

Webster received more than its share of state aid on three of four measures; its blended score of 55 stays between 53 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

77 / 100

84th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
78	70	81	81

Rank under other weightings: 77th to 89th.

Stable high: above 55 under every weighting

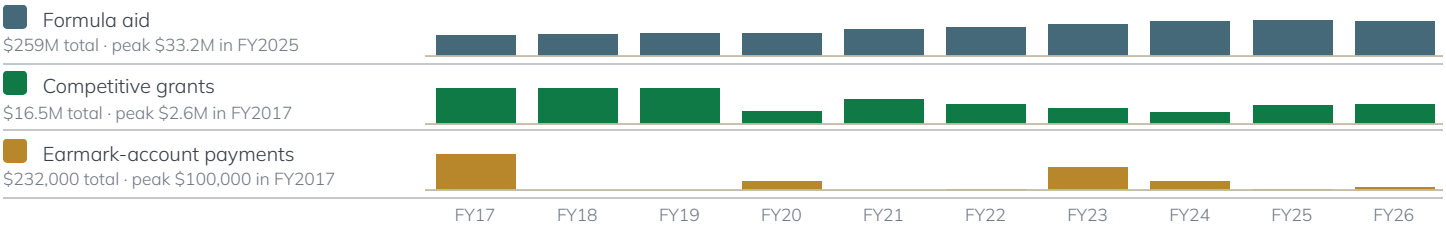
Webster received more than its share of discretionary money on all four measures; its blended score of 77 stays between 75 and 79 under every weighting tested.

STATE MONEY, FY2017–FY2026

Webster's town government and school districts received $259 million in formula aid and $16.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$259M	**$16.5M**	**$232,000**
$14,621 per resident (80th of 351) · gross	$927 per resident (82nd of 351)	$13.08 per resident (239th of 351)

Competitive grants to Webster were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.6 million, are not shown.

EARMARKS

Webster received $492,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$492,000	**$492,000**	**$492,000**	**Not a member**
$27.75 per resident (238th of 351)	$27.75 per resident (251st of 351)	$27.75 per resident (252nd of 351)	35 municipalities had none

Placed in the town: 14 clauses in eight of ten budgets; the most recent in FY2026. Every one names Webster directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2017	$100,000	"the office of community development in the town of Webster for the revitalization of the downtown area which has been designated as an area of slum..."	Enacted names the town
FY2025	$50,000	"the Webster Lake Association Inc. for costs associated with infrastructure projects and maintenance at Webster lake in the town of Webster"	Enacted names the town
FY2019	$50,000	"a maintenance pilot program for Lake Chargoggagoggmanchauggagoggchaubunagungamaugg in Webster"	Enacted names the town
FY2018	$50,000	"the design and construction of a drinking water main-line in the town of Webster"	Enacted names the town
FY2023	$35,000	"the fire department in the town of Webster for the purchase of hydraulically-powered rescue equipment"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Webster received 46% of its proportional share of competitive grant awards.

Local road miles **72.8** 181st of 351 · 4.1 per 1,000 residents (276th of 351)	Town-owned bridges, replacement cost **$9.7M** scored exposure $2.1M · none in poor condition	Road-stream crossings **77** 176th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **12.4 sq mi** 10% state-owned	Seasonal homes **2%** share of housing units	Peak service population **18,152** residents plus seasonal	Core infrastructure index **0.75** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,054 acres** 13.3% of land area · FY2026	State-owned land PILOT, FY2026 **$54,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$51.11** statewide $117 · FY2026	New growth per resident **$12,336** FY2017–2025 · 288th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 38.2% of Webster's general-fund spending in FY2025, down from 40.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **40.7%** $10.3M of $25.2M · median town 14.1%	FY2016 **33.2%** $13.9M of $41.9M · median town 12.2%	FY2025 **38.2%** $23.6M of $61.9M · median town 11.5%	Net of state charges, FY2025 **34.9%** FY2010: 33.6% · median town 10.0%

Webster's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.9 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Webster's state aid kept pace with both price measures: FY2025 aid was 48.3% above its FY2006 aid grown by Boston-area consumer prices and 31.8% above grown by the government price index.

Gross state aid went from $10.3 million in FY2006 to $23.6 million in FY2025, +130.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+11.9%** $5.6M to $6.3M · all towns +54.0%	All fixed costs, FY2016–25 **+29.4%** $9.5M to $12.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Webster's health insurance would have been $7.00 million in FY2025; it was $6.27 million, $728,000 below the path. Its fixed costs would have been $11.9 million in FY2025; it was $12.3 million, $430,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2020 (–38%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Webster came to $482,000, 72.4% of the $667,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$482,000	72.4%	28.2%
Placed in the town	$482,000	72.4%	42.3%
Everything placed	$482,000	72.4%	45.2%

SCHOOLS

Webster's required school contribution is 2.8% of median household income, 131st highest of 351.

Chapter 70 aid, FY2026 **$23.3M** to the town's district	Required local contribution **$15.6M** FY2026
Share of household income **2.8%** 131st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Webster runs its own school district and also belongs to Southern Worcester; Webster accounts for 12% of that district's foundation budget.

EXPECTED AND ACTUAL

Webster received $17 million in earmarks placed in the town and competitive grants over ten years, 71% more than the $9.9 million its size, need and institutions predict.

PEERS

Webster ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Webster this town	**55**	**$14,621**	**$927**	**$27.75**	**0.46**	**2.8%**
Spencer peer	59	$16,090	$675	$55.46	0.85	2.5%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Palmer peer	58	$16,159	$720	$29.88	0.54	2.2%
Greenfield peer	53	$14,180	$1,705	$134	4.81	2.9%
Clinton peer	53	$14,443	$344	$28.88	1.51	2.4%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Belchertown lowest in class of 30	49	$13,722	$401	$15.27	2.92	2.5%

SOURCES

Every figure traces to a public record.

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REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Wellesley

Town · Norfolk County · 30,347 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
14th Norfolk · Alice Hanlon Peisch

STATE SENATE
Norfolk and Middlesex · Cynthia Stone Creem

SCHOOL DISTRICTS
Wellesley Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Wellesley scores 28 on the Fairness Index for all state aid and 20 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

320th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
24	46	24	20

Rank under other weightings: 297th to 341st.

Stable low: below 45 under every weighting

Wellesley received less than its share of state aid on all four measures; its blended score of 28 stays between 24 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

20 / 100

311th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
16	34	19	13

Rank under other weightings: 298th to 324th.

Stable low: below 45 under every weighting

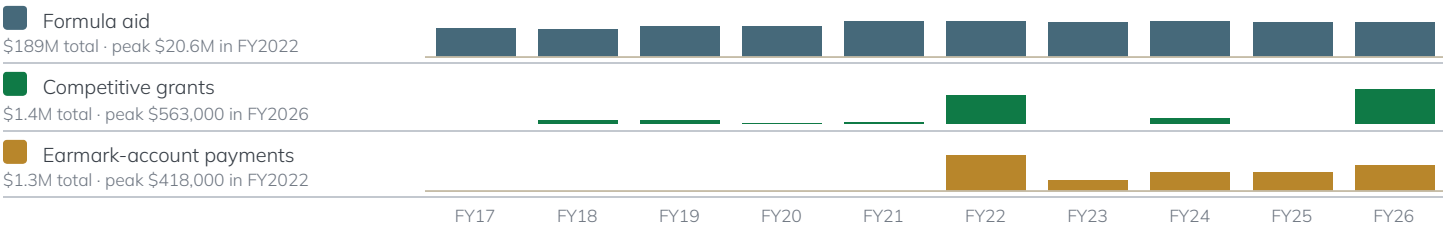
Wellesley received less than its share of discretionary money on all four measures; its blended score of 20 stays between 17 and 24 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wellesley's town government and school districts received $189 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$189M	$1.4M	$1.3M
$6,221 per resident (329th of 351) · gross	$46.83 per resident (348th of 351)	$42.46 per resident (101st of 351)

Competitive grants to Wellesley peaked in FY2026 at $563,000, 40% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $16.5 million, are not shown.

EARMARKS

Wellesley received $3 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$3M	$3M	$3M	Not a member
$99.75 per resident (51st of 351)	$99.75 per resident (69th of 351)	$99.75 per resident (79th of 351)	35 municipalities had none

Placed in the town: 44 clauses in nine of ten budgets; the most recent in FY2026. Every one names Wellesley directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$250,000	"rehabilitation and restoration of the Stone Building in Hemlock Gorge reservation in the town of Wellesley"	Enacted names the town
FY2025	$150,000	"the purchasing of radio equipment for the fire department in the town of Wellesley"	Enacted names the town
FY2026	$100,000	"Human Relations Service, Inc. in the town of Wellesley"	Enacted names the town
FY2026	$100,000	"Community Investors, Inc. for its PowerPlay Initiative of in the town of Wellesley in support of the expansion of an inclusive after-school and…"	Enacted names the town
FY2025	$100,000	"Community Investors, Inc.'s PowerPlay Initiative in the town of Wellesley to support the expansion of an inclusive after-school and…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wellesley received 18% of its proportional share of competitive grant awards.

Local road miles **112.2** 72nd of 351 · 3.7 per 1,000 residents (292nd of 351)	Town-owned bridges, replacement cost **$2.8M** scored exposure $598,000 · none in poor condition	Road-stream crossings **106** 107th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **10.0 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **30,524** residents plus seasonal	Core infrastructure index **1.00** roads, culverts, dams, coast, flood, energy

Burden index 0.18; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$58,160** FY2017–2025 · 27th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.1% of Wellesley's general-fund spending in FY2025, down from 7.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **7.3%** $6.4M of $86.9M · median town 14.1%	FY2016 **6.3%** $9.3M of $146M · median town 12.2%	FY2025 **6.1%** $12.1M of $197M · median town 11.5%	Net of state charges, FY2025 **5.4%** FY2010: 6.9% · median town 10.0%

Wellesley's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $4,272 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wellesley's state aid kept pace with both price measures: FY2025 aid was 22.5% above its FY2006 aid grown by Boston-area consumer prices and 8.9% above grown by the government price index.

Gross state aid went from $6.4 million in FY2006 to $12.1 million in FY2025, +89.9% in dollars. Flag: in FY2010, $622,000 of Wellesley's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+40.7%** $16.2M to $22.8M · all towns +54.0%	All fixed costs, FY2016–25 **+42.1%** $23M to $32.7M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wellesley's health insurance would have been $20.2 million in FY2025; it was $22.8 million, $2.56 million above the path. Its fixed costs would have been $28.7 million in FY2025; it was $32.7 million, $3.96 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wellesley came to $2.6 million, 40.1% of the $6.59 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.6M	40.1%	28.2%
Placed in the town	$2.6M	40.1%	42.3%
Everything placed	$2.6M	40.1%	45.2%

SCHOOLS

Wellesley's required school contribution is 1.9% of median household income, 317th highest of 351.

Chapter 70 aid, FY2026 **$10.9M** to the town's district	Required local contribution **$44.1M** FY2026
Share of household income **1.9%** 317th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+27%** after inflation

Wellesley runs its own school district and also belongs to Norfolk County; Wellesley accounts for 0% of that district's foundation budget.

EXPECTED AND ACTUAL

Wellesley received $6 million in earmarks placed in the town and competitive grants over ten years, about the $6.1 million its size, need and institutions predict.

PEERS

Wellesley ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wellesley this town	**28**	**$6,221**	**$46.83**	**$99.75**	**0.18**	**1.9%**
Needham peer	28	$6,664	$33.58	$150	0.21	2.5%
Belmont peer	32	$7,271	$63.18	$105	0.65	2.6%
Sudbury peer	38	$9,414	$150	$47.32	0.49	2.7%
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Andover peer	28	$6,322	$94.07	$42.90	0.79	2.8%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Wellfleet

Town · Barnstable County · 4,404 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Barnstable · Hadley Luddy

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Wellfleet Public Schools, the town's own district
Nauset Regional School District, shared with Brewster, Eastham and Orleans
Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Wellfleet scores 37 on the Fairness Index for all state aid and 95 for discretionary money. Fifty is a fair share.

ALL STATE AID

37 / 100

245th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	37	46	34

Rank under other weightings: 219th to 274th.

Stable low: below 45 under every weighting

Wellfleet received less than its share of state aid on all four measures; its blended score of 37 stays between 34 and 40 under every weighting tested.

DISCRETIONARY MONEY ONLY

95 / 100

19th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	97	89	97

Rank under other weightings: 17th to 24th.

Stable high: above 55 under every weighting

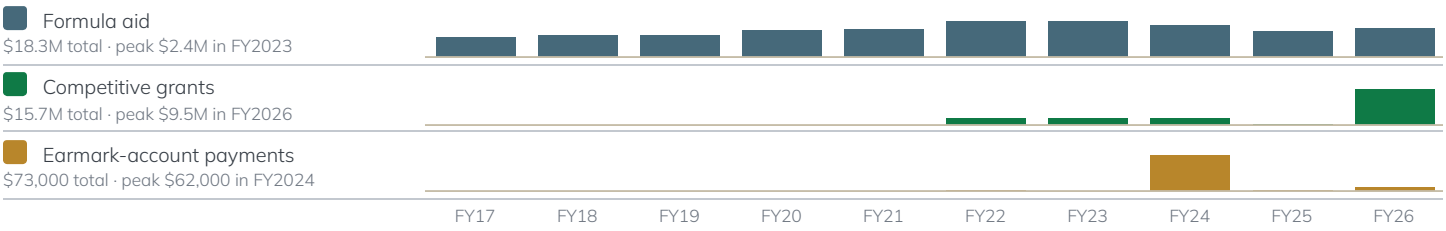
Wellfleet received more than its share of discretionary money on all four measures; its blended score of 95 stays between 94 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wellfleet's town government and school districts received $18.3 million in formula aid and $15.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$18.3M	**$15.7M**	**$73,000**
$4,162 per resident (351st of 351) · gross	$3,572 per resident (27th of 351)	$16.67 per resident (221st of 351)

Competitive grants to Wellfleet peaked in FY2026 at $9.5 million, 61% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $30 million, are not shown.

EARMARKS

Wellfleet received $262,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$262,000	**$262,000**	**$262,000**	**Not a member**
$59.49 per resident (118th of 351)	$59.49 per resident (140th of 351)	$59.49 per resident (147th of 351)	35 municipalities had none

Placed in the town: five clauses in four of ten budgets; the most recent in FY2025. Every one names Wellfleet directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$125,000	"the town of Wellfleet for the purchase and installation of ice machines and ice storage equipment"	Enacted names the town
FY2024	$75,000	"The Lily House Inc. in the town of Wellfleet for hospice house facility repairs"	Enacted names the town
FY2025	$50,000	"the town of Wellfleet department of community services to conduct a feasibility study of an outer Cape aquatic center including, but not limited to..."	Enacted names the town
FY2020	$6,000 (split five ways)	"the police department in the town of Eastham to be used in conjunction with the towns of Wellfleet, Truro and Provincetown to address the traffic..."	Enacted names the town
FY2018	$6,000 (split five ways)	"the police department in the town of Eastham to be used in conjunction with the towns of Wellfleet, Truro and Provincetown to address the traffic..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wellfleet received 1.85 times its proportional share of competitive grant awards.

Local road miles **54.2** 236th of 351 · 12.3 per 1,000 residents (85th of 351)	Town-owned bridges, replacement cost **$2M** scored exposure $737,000 · none in poor condition	Road-stream crossings **26** 322nd of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **19.8 sq mi** 2% state-owned	Seasonal homes **54%** share of housing units	Peak service population **9,683** residents plus seasonal	Core infrastructure index **0.46** roads, culverts, dams, coast, flood, energy

Burden index 1.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **115 acres** 0.9% of land area · FY2026	State-owned land PILOT, FY2026 **$21,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$181** statewide $117 · FY2026	New growth per resident **$41,149** FY2017–2025 · 54th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.3% of Wellfleet's general-fund spending in FY2025, down from 3.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.5%** $462,000 of $13.3M · median town 14.1%	FY2016 **1.5%** $268,000 of $18.1M · median town 12.2%	FY2025 **1.3%** $439,000 of $33.6M · median town 11.5%	Net of state charges, FY2025 **-0.1%** FY2010: 0.6% · median town 10.0%

Wellfleet's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $474,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wellfleet's state aid did not keep pace with either price measure: FY2025 aid was 38.8% below its FY2006 aid grown by Boston-area consumer prices and 45.6% below grown by the government price index.

Gross state aid went from $462,000 in FY2006 to $439,000 in FY2025, –5.1% in dollars. Flag: in FY2010, $205,000 of Wellfleet's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+72.0%** $1.2M to $2M · all towns +54.0%	All fixed costs, FY2016–25 **+57.1%** $2.8M to $4.3M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wellfleet's health insurance would have been $1.47 million in FY2025; it was $2.03 million, $556,000 above the path. Its fixed costs would have been $3.45 million in FY2025; it was $4.33 million, $889,000 above the path.

Flag: fixed costs changed by more than 30% in one year in FY2024 (+39%); health insurance changed by more than 30% in one year in FY2024 (+53%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wellfleet came to $262,000, 30.8% of the $850,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$262,000	30.8%	28.2%
Placed in the town	$262,000	30.8%	42.3%
Everything placed	$262,000	30.8%	45.2%

SCHOOLS

Wellfleet's required school contribution is 1.3% of median household income, the tenth-lowest of 351.

Chapter 70 aid, FY2026 **$865,000** to the town's district	Required local contribution **$3.1M** FY2026
Share of household income **1.3%** 342nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Wellfleet runs its own district for some grades and belongs to Nauset and Cape Cod for others; Wellfleet accounts for 12% and 2% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Wellfleet received $16.5 million in earmarks placed in the town and competitive grants over ten years, 3.4 times the $4.8 million its size, need and institutions predict.

PEERS

Wellfleet ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wellfleet this town	**37**	**$4,162**	**$3,572**	**$59.49**	**1.85**	**1.3%**
Lenox peer	32	$6,580	$735	$14.77	1.89	2.1%
Marion peer	30	$6,631	$643	$12.24	0.43	2.7%
Rockport peer	29	$6,385	$408	$88.56	1.27	2.1%
Hadley peer	38	$6,882	$989	$42.59	2.48	2.0%
Nahant peer	32	$5,917	$268	$136	0.69	1.6%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Erving lowest in class of 30	50	$7,326	$3,750	$0	8.12	4.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Wendell

Town · Franklin County · 850 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Hampden · Aaron L. Saunders

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

New Salem-Wendell Regional School District, shared with New Salem
Ralph C Mahar Regional School District, shared with New Salem, Orange and Petersham
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY

Franklin Regional Council Of Governments

FAIRNESS INDEX

Wendell scores 65 on the Fairness Index for all state aid and 96 for discretionary money. Fifty is a fair share.

ALL STATE AID

65 / 100

25th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
75	68	57	60

Rank under other weightings: 12th to 41st.

Stable high: above 55 under every weighting

Wendell received more than its share of state aid on all four measures; its blended score of 65 stays between 61 and 69 under every weighting tested.

DISCRETIONARY MONEY ONLY

96 / 100

13th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
98	97	95	96

Rank under other weightings: 11th to 18th.

Stable high: above 55 under every weighting

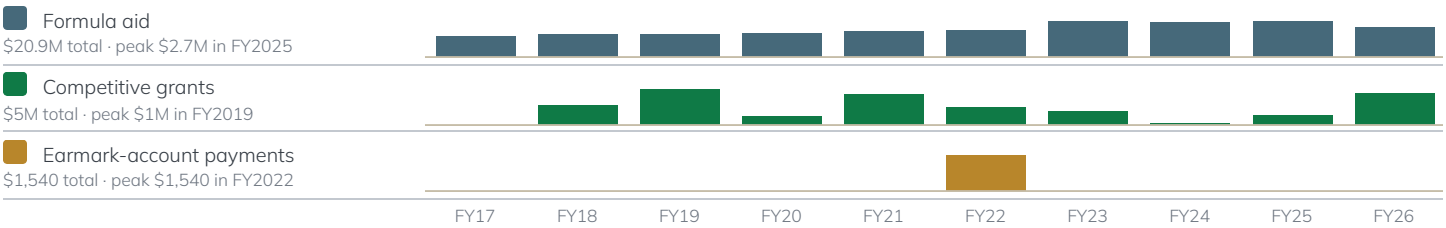
Wendell received more than its share of discretionary money on all four measures; its blended score of 96 stays between 96 and 97 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wendell's town government and school districts received $20.9 million in formula aid and $5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$20.9M	**$5M**	**$1,540**
$24,634 per resident (11th of 351) · gross	$5,863 per resident (13th of 351)	$1.81 per resident (316th of 351)

Competitive grants to Wendell peaked in FY2019 at $1 million, 21% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

With 850 residents, a single payment moves Wendell's per-resident figures a long way.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.2 million, are not shown.

EARMARKS

Wendell received $90,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$90,000	**$90,000**	**$90,000**	**Not a member**
$106 per resident (41st of 351)	$106 per resident (62nd of 351)	$106 per resident (68th of 351)	35 municipalities had none

Placed in the town: three clauses in three of ten budgets; the most recent in FY2025. Every one names Wendell directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$40,000	"the town of Wendell for road and highway department equipment and improvements"	Enacted names the town
FY2025	$25,000	"Wendell Historical Society Inc to assist in the renovation of the former Wendell depot store and post office"	Enacted names the town
FY2022	$25,000	"the Friends of Wendell Meetinghouse for improvements to community gathering space during the COVID-19 pandemic and the recovery period post-pandemic"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wendell received 54% of its proportional share of competitive grant awards.

Local road miles **46.8** 265th of 351 · 55.1 per 1,000 residents (20th of 351)	Town-owned bridges, replacement cost **$9.2M** scored exposure $1.4M · none in poor condition	Road-stream crossings **61** 226th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **31.9 sq mi** 45% state-owned	Seasonal homes **4%** share of housing units	Peak service population **885** residents plus seasonal	Core infrastructure index **0.00** roads, culverts, dams, coast, flood, energy

Burden index 0.54; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **8,087 acres** 39.7% of land area · FY2026	State-owned land PILOT, FY2026 **$193,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$23.81** statewide $117 · FY2026	New growth per resident **$21,663** FY2017–2025 · 165th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.7% of Wendell's general-fund spending in FY2025, down from 26.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **26.0%** $461,000 of $1.8M · median town 14.1%	FY2016 **15.1%** $348,000 of $2.3M · median town 12.2%	FY2025 **12.7%** $563,000 of $4.4M · median town 11.5%	Net of state charges, FY2025 **12.7%** FY2010: 14.0% · median town 10.0%

Wendell's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wendell's state aid did not keep pace with either price measure: FY2025 aid was 21.2% below its FY2006 aid grown by Boston-area consumer prices and 30.0% below grown by the government price index.

Gross state aid went from $461,000 in FY2006 to $563,000 in FY2025, +22.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+57.9%** $38,000 to $60,000 · all towns +54.0%	All fixed costs, FY2016–25 **+2.2%** $146,000 to $149,000 · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wendell's health insurance would have been $48,000 in FY2025; it was $60,000, $13,000 above the path. Its fixed costs would have been $182,000 in FY2025; it was $149,000, $33,000 below the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (–30%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wendell came to $90,000, 4.1 times the $22,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$90,000	4.1 times	28.2%
Placed in the town	$90,000	4.1 times	42.3%
Everything placed	$90,000	4.1 times	45.2%

SCHOOLS

Wendell's required school contribution is 3.0% of median household income, 86th highest of 351.

Chapter 70 aid, FY2026 **$1.1M** attributed to the town	Required local contribution **$698,000** FY2026
Share of household income **3.0%** 86th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+12%** after inflation

Wendell has no school district of its own. Its pupils attend New Salem-Wendell, Ralph C Mahar and Franklin County; Wendell accounts for 58%, 7% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Wendell received $5.1 million in earmarks placed in the town and competitive grants over ten years, 60% of the $8.4 million its size, need and institutions predict.

PEERS

Wendell ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wendell this town	**65**	**$24,634**	**$5,863**	**$106**	**0.54**	**3.0%**
Charlemont peer	64	$19,209	$6,110	$148	2.68	3.8%
Savoy peer · lowest in class of 30	57	$18,956	$1,027	$0	1.10	2.7%
Plainfield peer	52	$15,369	$4,077	$0	1.79	4.5%
New Salem peer	55	$19,167	$1,900	$101	0.36	2.6%
Granville peer	50	$11,112	$2,359	$0	0.73	2.8%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

Wenham

Town · Essex County · 4,929 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

6th Essex · Hannah Bowen and Jerald A. Parisella (until May 2025) 50% of residents
13th Essex · Sally P. Kerans 50% of residents

Wenham is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Hamilton-Wenham Regional School District, shared with Hamilton
Essex North Shore Agricultural and Technical School District, vocational, shared with Beverly, Boxford, Danvers, Essex, Gloucester, Hamilton, Lynnfield, Manchester-by-the-Sea and eight others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Wenham scores 29 on the Fairness Index for all state aid and 28 for discretionary money. Fifty is a fair share.

ALL STATE AID

29 / 100

316th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	44	30	14

Rank under other weightings: 288th to 339th.

Stable low: below 45 under every weighting

Wenham received less than its share of state aid on all four measures; its blended score of 29 stays between 25 and 34 under every weighting tested.

DISCRETIONARY MONEY ONLY

28 / 100

273rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	42	28	14

Rank under other weightings: 267th to 293rd.

Stable low: below 45 under every weighting

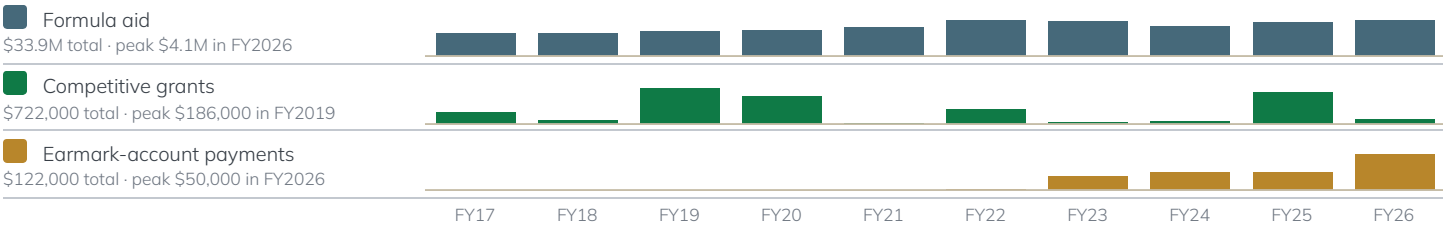
Wenham received less than its share of discretionary money on all four measures; its blended score of 28 stays between 23 and 32 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wenham's town government and school districts received $33.9 million in formula aid and $722,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$33.9M	$722,000	$122,000
$6,869 per resident (295th of 351) · gross	$147 per resident (293rd of 351)	$24.78 per resident (176th of 351)

Competitive grants to Wenham peaked in FY2019 at $186,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.6 million, are not shown.

EARMARKS

Wenham received $341,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$341,000	$341,000	$341,000	Not a member
$69.20 per resident (87th of 351)	$69.20 per resident (116th of 351)	$69.20 per resident (123rd of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2026. Every one names Wenham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$150,000	"renovations and improvements to state highway route 1A in the town of Wenham"	Enacted names the town
FY2026	$50,000	"the town of Wenham for the procurement of a rescue boat to be used by the Wenham fire department"	Enacted names the town
FY2024	$50,000	"the procurement of multi-band portable communication radios at the Wenham fire department"	Enacted names the town
FY2025	$25,000	"the procurement of multi-band portable communication radios for the Wenham fire department"	Enacted names the town
FY2022	$25,000	"a public safety grant in the town of Wenham"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wenham received 80% of its proportional share of competitive grant awards.

Local road miles **27.8** 327th of 351 · 5.6 per 1,000 residents (207th of 351)	Town-owned bridges, replacement cost **$1M** scored exposure $256,000 · none in poor condition	Road-stream crossings **34** 307th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **7.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,929** residents plus seasonal	Core infrastructure index **1.62** roads, culverts, dams, coast, flood, energy

Burden index 0.80; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$5,586** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$7,071** statewide $117 · FY2026	New growth per resident **$23,004** FY2017–2025 · 152nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.5% of Wenham's general-fund spending in FY2025, down from 4.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **4.7%** $517,000 of $11M · median town 14.1%	FY2016 **2.7%** $416,000 of $15.2M · median town 12.2%	FY2025 **2.5%** $581,000 of $23.6M · median town 11.5%	Net of state charges, FY2025 **1.8%** FY2010: 2.0% · median town 10.0%

Wenham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wenham's state aid did not keep pace with either price measure: FY2025 aid was 27.5% below its FY2006 aid grown by Boston-area consumer prices and 35.6% below grown by the government price index.

Gross state aid went from $517,000 in FY2006 to $581,000 in FY2025, +12.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+75.5%** $571,000 to $1M · all towns +54.0%	All fixed costs, FY2016–25 **+73.2%** $1.3M to $2.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wenham's health insurance would have been $714,000 in FY2025; it was $1.00 million, $289,000 above the path. Its fixed costs would have been $1.63 million in FY2025; it was $2.26 million, $630,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wenham came to $284,000, 65.9% of the $432,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$284,000	65.9%	28.2%
Placed in the town	$284,000	65.9%	42.3%
Everything placed	$284,000	65.9%	45.2%

SCHOOLS

Wenham's required school contribution is 2.5% of median household income, 223rd highest of 351.

Chapter 70 aid, FY2026 **$1.7M** attributed to the town	Required local contribution **$6.2M** FY2026
Share of household income **2.5%** 223rd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+6%** after inflation

Wenham has no school district of its own. Its pupils attend Hamilton-Wenham and Essex North Shore; Wenham accounts for 35% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Wenham received $1.4 million in earmarks placed in the town and competitive grants over ten years, 88% of the $1.5 million its size, need and institutions predict.

PEERS

Wenham ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wenham this town	**29**	**$6,869**	**$147**	**$69.20**	**0.80**	**2.5%**
Oak Bluffs peer	51	$8,440	$2,606	$93.40	3.64	3.0%
Upton peer	56	$14,491	$622	$40.72	1.73	2.8%
Boxborough peer	34	$8,257	$231	$43.67	0.36	2.8%
West Newbury peer	48	$10,655	$574	$38.12	0.91	2.1%
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

West Boylston

Town · Worcester County · 7,782 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
14th Worcester · James J. O'Day

STATE SENATE
First Worcester · Robyn K. Kennedy

SCHOOL DISTRICTS
West Boylston Public Schools, the town's own district

REGIONAL PLANNING AGENCY
Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

West Boylston scores 35 on the Fairness Index for all state aid and 37 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

263rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
35	35	39	31

Rank under other weightings: 239th to 286th.

Stable low: below 45 under every weighting

West Boylston received less than its share of state aid on all four measures; its blended score of 35 stays between 34 and 36 under every weighting tested.

DISCRETIONARY MONEY ONLY

37 / 100

235th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	37	40	33

Rank under other weightings: 224th to 246th.

Stable low: below 45 under every weighting

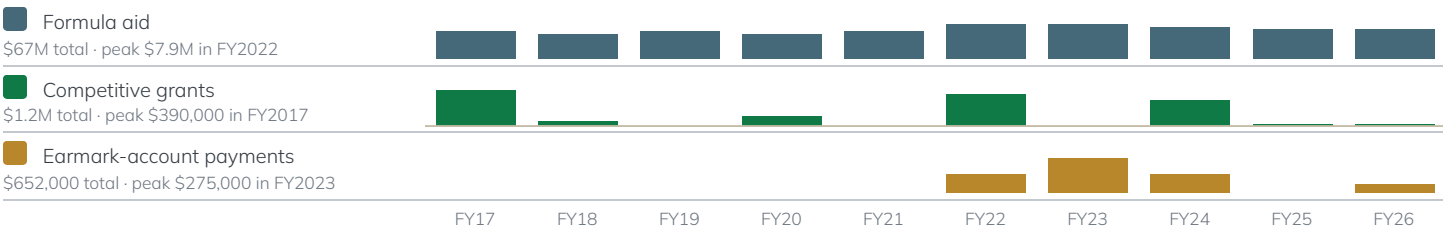
West Boylston received less than its share of discretionary money on all four measures; its blended score of 37 stays between 36 and 38 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Boylston's town government and school districts received $67 million in formula aid and $1.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$67M	$1.2M	$652,000
$8,612 per resident (233rd of 351) · gross	$157 per resident (280th of 351)	$83.83 per resident (33rd of 351)

Competitive grants to West Boylston peaked in FY2017 at $390,000, 32% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.7 million, are not shown.

EARMARKS

West Boylston received $1.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	$1.1M	$1.1M	Not a member
$148 per resident (17th of 351)	$148 per resident (27th of 351)	$148 per resident (33rd of 351)	35 municipalities had none

Placed in the town: nine clauses in seven of ten budgets; the most recent in FY2026. Every one names West Boylston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$200,000	"the reconstruction of the existing sidewalks and to connect the sidewalk network to the department of conservation and recreation parking lot for the..."	Enacted names the town
FY2026	$150,000	"the repair and maintenance of Woodland park in the town of West Boylston"	Enacted names the town
FY2024	$150,000	"upgrades to Pride park in the town of West Boylston to be more accessible to persons with disabilities and compliant with the Americans with..."	Enacted names the town
FY2023	$150,000	"renovating Mixter field in West Boylston"	Enacted names the town
FY2022	$150,000	"update the town of West Boylston's playground for compliance with the Americans with Disabilities Act"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, West Boylston received 30% of its proportional share of competitive grant awards.

Local road miles **51.7** 244th of 351 · 6.6 per 1,000 residents (169th of 351)	Town-owned bridges, replacement cost **$569,000** scored exposure $318,000 · one in poor condition	Road-stream crossings **154** 34th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.0 sq mi** 34% state-owned	Seasonal homes **0%** share of housing units	Peak service population **7,782** residents plus seasonal	Core infrastructure index **0.88** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$13,578** FY2017–2025 · 272nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 16.9% of West Boylston's general-fund spending in FY2025, down from 27.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **27.3%** $4.7M of $17.3M · median town 14.1%	FY2016 **22.5%** $5.2M of $23.3M · median town 12.2%	FY2025 **16.9%** $5.1M of $30.3M · median town 11.5%	Net of state charges, FY2025 **15.7%** FY2010: 24.2% · median town 10.0%

West Boylston's state aid did not keep pace with either price measure: FY2025 aid was 30.2% below its FY2006 aid grown by Boston-area consumer prices and 37.9% below grown by the government price index.

Gross state aid went from $4.7 million in FY2006 to $5.1 million in FY2025, +8.3% in dollars. Flag: in FY2010, $638,000 of West Boylston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+31.9%** $2.8M to $3.7M · all towns +54.0%	All fixed costs, FY2016–25 **+50.8%** $4.2M to $6.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Boylston's health insurance would have been $3.52 million in FY2025; it was $3.72 million, $199,000 above the path. Its fixed costs would have been $5.25 million in FY2025; it was $6.34 million, $1.09 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Boylston came to $999,000, 111.0% of the $900,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$999,000	111.0%	28.2%
Placed in the town	$999,000	111.0%	42.3%
Everything placed	$999,000	111.0%	45.2%

SCHOOLS

West Boylston's required school contribution is 3.0% of median household income, 76th highest of 351.

Chapter 70 aid, FY2026 **$3.4M** to the town's district	Required local contribution **$9.4M** FY2026
Share of household income **3.0%** 76th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–13%** after inflation

West Boylston runs its own school district.

EXPECTED AND ACTUAL

West Boylston received $2.4 million in earmarks placed in the town and competitive grants over ten years, 55% of the $4.3 million its size, need and institutions predict.

PEERS

West Boylston ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Boylston this town	**35**	**$8,612**	**$157**	**$148**	**0.30**	**3.0%**
Merrimac peer	47	$12,597	$215	$48.54	1.78	2.5%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Deerfield peer	44	$9,461	$1,195	$6.46	2.83	2.4%
Ashburnham peer	54	$16,359	$402	$26.50	0.70	2.5%
Plainville peer	39	$9,512	$160	$41.02	0.68	3.3%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

West Bridgewater

Town · Plymouth County · 7,708 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Plymouth · Bridget Plouffe

STATE SENATE

Norfolk, Plymouth and Bristol · William J. Driscoll, Jr.

SCHOOL DISTRICTS

West Bridgewater Public Schools, the town's own district

Southeastern Regional Vocational Technical School District, vocational, shared with Brockton, East Bridgewater, Easton, Foxborough, Mansfield, Norton, Sharon and Stoughton

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

West Bridgewater scores 41 on the Fairness Index for all state aid and 28 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

201st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
42	49	35	38

Rank under other weightings: 182nd to 221st.

Stable low: below 45 under every weighting

West Bridgewater received less than its share of state aid on all four measures; its blended score of 41 stays between 39 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

28 / 100

272nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
30	36	20	26

Rank under other weightings: 267th to 285th.

Stable low: below 45 under every weighting

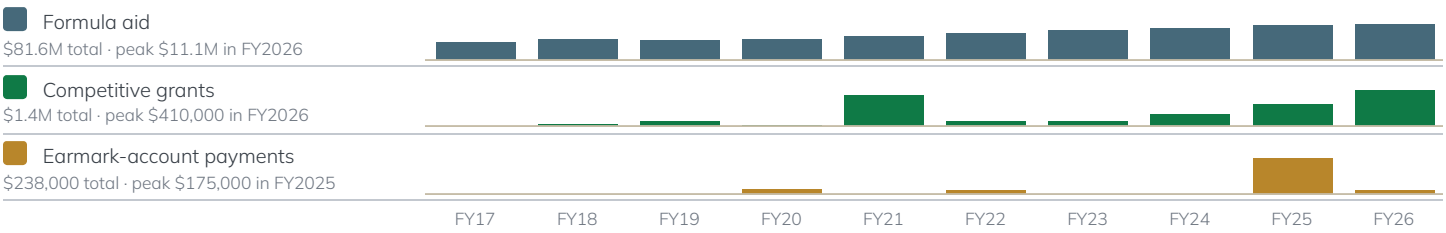
West Bridgewater received less than its share of discretionary money on all four measures; its blended score of 28 stays between 25 and 31 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Bridgewater's town government and school districts received $81.6 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$81.6M	**$1.4M**	**$238,000**
$10,584 per resident (165th of 351) · gross	$177 per resident (266th of 351)	$30.91 per resident (145th of 351)

Competitive grants to West Bridgewater peaked in FY2026 at $410,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.4 million, are not shown.

EARMARKS

West Bridgewater received $503,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$503,000	**$503,000**	**$503,000**	**Not a member**
$65.30 per resident (98th of 351)	$65.30 per resident (127th of 351)	$65.30 per resident (133rd of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. Every one names West Bridgewater directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$75,000	"the West Bridgewater food pantry"	Enacted names the town
FY2024	$75,000	"the West Bridgewater department of public works for upgrades and maintenance of town property"	Enacted names the town
FY2023	$75,000	"sidewalk installation and repairs on route 28 in the town of West Bridgewater"	Enacted names the town
FY2023	$75,000	"the signalization of the Matfield street and the state highway route 28 intersection in the town of West Bridgewater"	Enacted names the town
FY2025	$50,000	"the purchase of a new set of electric jaws of life for the West Bridgewater fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, West Bridgewater received 30% of its proportional share of competitive grant awards.

Local road miles **50.6** 251st of 351 · 6.6 per 1,000 residents (174th of 351)	Town-owned bridges, replacement cost **$10.5M** scored exposure $3.6M · one in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **15.3 sq mi** 16% state-owned	Seasonal homes **1%** share of housing units	Peak service population **7,765** residents plus seasonal	Core infrastructure index **0.69** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,365 acres** 13.9% of land area · FY2026	State-owned land PILOT, FY2026 **$65,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$47.80** statewide $117 · FY2026	New growth per resident **$32,413** FY2017–2025 · 95th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 22.4% of West Bridgewater's general-fund spending in FY2025, up from 17.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.9%** $3.3M of $18.6M · median town 14.1%	FY2016 **18.5%** $5.1M of $27.5M · median town 12.2%	FY2025 **22.4%** $9.2M of $41.2M · median town 11.5%	Net of state charges, FY2025 **20.5%** FY2010: 14.3% · median town 10.0%

West Bridgewater's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $712,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

West Bridgewater's state aid kept pace with both price measures: FY2025 aid was 78.5% above its FY2006 aid grown by Boston-area consumer prices and 58.6% above grown by the government price index.

Gross state aid went from $3.3 million in FY2006 to $9.2 million in FY2025, +176.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.8%** $2.5M to $3.8M · all towns +54.0%	All fixed costs, FY2016–25 **+64.5%** $4.4M to $7.3M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Bridgewater's health insurance would have been $3.09 million in FY2025; it was $3.83 million, $741,000 above the path. Its fixed costs would have been $5.54 million in FY2025; it was $7.29 million, $1.76 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Bridgewater came to $453,000, 33.4% of the $1.36 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$453,000	33.4%	28.2%
Placed in the town	$453,000	33.4%	42.3%
Everything placed	$453,000	33.4%	45.2%

SCHOOLS

West Bridgewater's required school contribution is 2.9% of median household income, 100th highest of 351.

Chapter 70 aid, FY2026 **$7.8M** to the town's district	Required local contribution **$10.6M** FY2026
Share of household income **2.9%** 100th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+31%** after inflation

West Bridgewater runs its own school district and also belongs to Southeastern; West Bridgewater accounts for 5% of that district's foundation budget.

EXPECTED AND ACTUAL

West Bridgewater received $1.9 million in earmarks placed in the town and competitive grants over ten years, 41% of the $4.6 million its size, need and institutions predict.

PEERS

West Bridgewater ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Bridgewater this town	**41**	**$10,584**	**$177**	**$65.30**	**0.30**	**2.9%**
Southwick peer	56	$14,645	$652	$57.30	0.77	2.4%
Hopedale peer	54	$14,756	$309	$141	0.38	3.2%
Halifax peer	48	$12,543	$155	$155	0.34	2.6%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Avon peer	46	$10,665	$1,049	$101	3.02	3.0%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Uxbridge lowest in class of 30	48	$11,199	$436	$15.55	1.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

West Brookfield

Town · Worcester County · 3,859 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
5th Worcester · Donald R. Berthiaume, Jr.	Worcester and Hampshire · Peter J. Durant	Quaboag Regional School District, shared with Warren	Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

West Brookfield scores 56 on the Fairness Index for all state aid and 82 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

73rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
55	49	56	63

Rank under other weightings: 56th to 99th.

Weighting-dependent: the range crosses the 45–55 band

West Brookfield received more than its share of state aid on three of four measures; its blended score of 56 stays between 54 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

82 / 100

66th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
82	78	83	86

Rank under other weightings: 61st to 76th.

Stable high: above 55 under every weighting

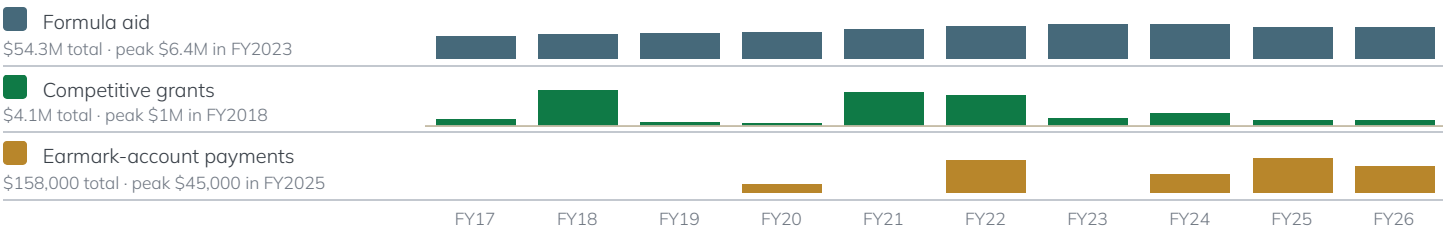
West Brookfield received more than its share of discretionary money on all four measures; its blended score of 82 stays between 81 and 84 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Brookfield's town government and school districts received $54.3 million in formula aid and $4.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$54.3M	**$4.1M**	**$158,000**
$14,082 per resident (93rd of 351) · gross	$1,069 per resident (74th of 351)	$41.02 per resident (106th of 351)

Competitive grants to West Brookfield peaked in FY2018 at $1 million, 24% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.3 million, are not shown.

EARMARKS

West Brookfield received $255,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$255,000	**$255,000**	**$255,000**	**Not a member**
$66.08 per resident (96th of 351)	$66.08 per resident (124th of 351)	$66.08 per resident (130th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2026. Every one names West Brookfield directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$50,000	"the Quaboag Historical Society, Inc. in the town of West Brookfield for a new roof at the Quaboag Historical Society Museum"	Enacted names the town
FY2024	$50,000	"the purchase of a municipal vehicle in the town of West Brookfield"	Enacted names the town
FY2019	$50,000	"a dredging project and to improve, manage and protect the water quality in Lake Wickaboag in the town of West Brookfield"	Enacted names the town
FY2026	$35,000	"upgrades to the police station in the town of West Brookfield"	Enacted names the town
FY2025	$25,000	"the West Brookfield fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, West Brookfield received 1.84 times its proportional share of competitive grant awards.

Local road miles **50.6** 250th of 351 · 13.1 per 1,000 residents (79th of 351)	Town-owned bridges, replacement cost **$8.2M** scored exposure $4.1M · one in poor condition	Road-stream crossings **80** 166th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **20.5 sq mi** 13% state-owned	Seasonal homes **1%** share of housing units	Peak service population **3,918** residents plus seasonal	Core infrastructure index **2.06** roads, culverts, dams, coast, flood, energy

Burden index 1.84; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,552 acres** 11.8% of land area · FY2026	State-owned land PILOT, FY2026 **$105,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$67.51** statewide $117 · FY2026	New growth per resident **$13,247** FY2017–2025 · 277th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.3% of West Brookfield's general-fund spending in FY2025, down from 11.8% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.8%** $642,000 of $5.4M · median town 14.1%	FY2016 **10.7%** $739,000 of $6.9M · median town 12.2%	FY2025 **11.3%** $1.1M of $9.5M · median town 11.5%	Net of state charges, FY2025 **10.2%** FY2010: 12.1% · median town 10.0%

West Brookfield's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

West Brookfield's state aid kept pace with consumer prices but not with government costs: FY2025 aid was 7.9% above its FY2006 aid grown by Boston-area consumer prices and 4.1% below grown by the government price index.

Gross state aid went from $642,000 in FY2006 to $1.1 million in FY2025, +67.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.9%** $265,000 to $365,000 · all towns +54.0%	All fixed costs, FY2016–25 **+76.0%** $591,000 to $1M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Brookfield's health insurance would have been $330,000 in FY2025; it was $365,000, $34,000 above the path. Its fixed costs would have been $738,000 in FY2025; it was $1.04 million, $302,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Brookfield came to $170,000, 169.5% of the $100,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$170,000	169.5%	28.2%
Placed in the town	$170,000	169.5%	42.3%
Everything placed	$170,000	169.5%	45.2%

SCHOOLS

West Brookfield's required school contribution is 2.6% of median household income, 177th highest of 351.

Chapter 70 aid, FY2026 **$3.5M** attributed to the town	Required local contribution **$4.2M** FY2026
Share of household income **2.6%** 177th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+8%** after inflation

West Brookfield has no school district of its own. Its pupils attend West Brookfield and Quaboag; West Brookfield accounts for 100% and 40% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

West Brookfield received $4.4 million in earmarks placed in the town and competitive grants over ten years, 31% more than the $3.3 million its size, need and institutions predict.

PEERS

West Brookfield ranks 3rd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Brookfield this town	**56**	**$14,082**	**$1,069**	**$66.08**	**1.84**	**2.6%**
Dalton peer	58	$17,590	$490	$27.97	1.32	2.7%
Brookfield peer	55	$14,600	$1,459	$32.37	2.11	2.4%
Barre peer	63	$20,237	$183	$22.43	0.33	2.1%
North Brookfield peer	56	$15,678	$1,128	$7.35	0.87	2.9%
Lanesborough peer · lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%
Shelburne best in class of 30	66	$14,126	$8,461	$182	2.94	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

ESSEX COUNTY

West Newbury

Town · Essex County · 4,591 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

14th Essex · Adrianne Pusateri Ramos

STATE SENATE

First Essex and Middlesex · Bruce E. Tarr

SCHOOL DISTRICTS

Pentucket Regional School District, shared with Groveland and Merrimac
Whittier Regional Vocational Technical School District, vocational, shared with Amesbury, Georgetown, Groveland, Haverhill, Ipswich, Merrimac, Newbury, Newburyport and two others

REGIONAL PLANNING AGENCY

Merrimack Valley Planning Commission

FAIRNESS INDEX

West Newbury scores 48 on the Fairness Index for all state aid and 66 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

140th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	65	43	40

Rank under other weightings: 108th to 161st.

Weighting-dependent: the range crosses the 45–55 band

West Newbury received less than its share of state aid on three of four measures; its blended score of 48 stays between 44 and 52 under every weighting tested.

DISCRETIONARY MONEY ONLY

66 / 100

123rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
63	80	60	60

Rank under other weightings: 113th to 131st.

Stable high: above 55 under every weighting

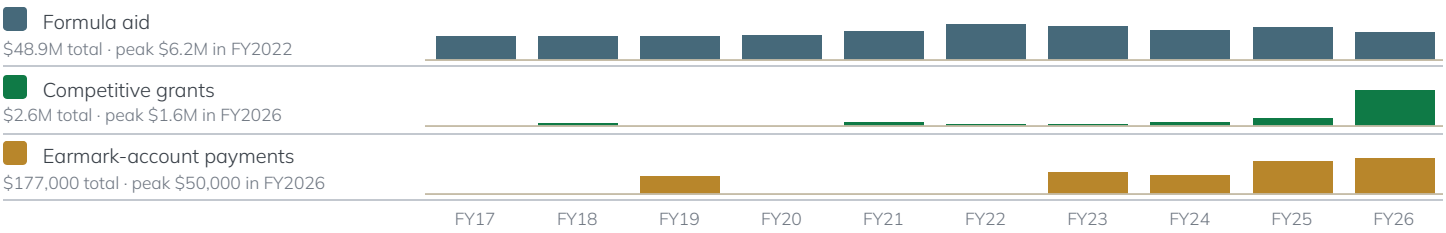
West Newbury received more than its share of discretionary money on all four measures; its blended score of 66 stays between 62 and 69 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Newbury's town government and school districts received $48.9 million in formula aid and $2.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$48.9M	**$2.6M**	**$177,000**
$10,655 per resident (160th of 351) · gross	$574 per resident (127th of 351)	$38.52 per resident (114th of 351)

Competitive grants to West Newbury peaked in FY2026 at $1.6 million, 59% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.3 million, are not shown.

EARMARKS

West Newbury received $175,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$175,000	**$175,000**	**$175,000**	**Not a member**
$38.12 per resident (198th of 351)	$38.12 per resident (211th of 351)	$38.12 per resident (214th of 351)	35 municipalities had none

Placed in the town: seven clauses in six of ten budgets; the most recent in FY2025. Every one names West Newbury directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$30,000	"the town of West Newbury for pedestrian and cycling infrastructure safety improvements"	Enacted names the town
FY2023	$30,000	"the planning, design, engineering and construction of sidewalks and pedestrian safety improvements in the town of West Newbury"	Enacted names the town
FY2025	$25,000	"funding to repair the Middle street bridge in the town of West Newbury"	Enacted names the town
FY2022	$25,000	"a safety audit of an intersection in the town of West Newbury"	Enacted names the town
FY2019	$25,000	"a celebration of West Newbury"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, West Newbury received 91% of its proportional share of competitive grant awards.

Local road miles **45.8** 267th of 351 · 10.0 per 1,000 residents (109th of 351)	Town-owned bridges, replacement cost **$206,000** scored exposure $174,000 · one in poor condition	Road-stream crossings **73** 186th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **13.4 sq mi** 6% state-owned	Seasonal homes **0%** share of housing units	Peak service population **4,591** residents plus seasonal	Core infrastructure index **1.47** roads, culverts, dams, coast, flood, energy

Burden index 0.91; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **411 acres** 4.8% of land area · FY2026	State-owned land PILOT, FY2026 **$81,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$198** statewide $117 · FY2026	New growth per resident **$23,643** FY2017–2025 · 148th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 2.5% of West Newbury's general-fund spending in FY2025, down from 3.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.6%** $351,000 of $9.7M · median town 14.1%	FY2016 **2.6%** $357,000 of $13.8M · median town 12.2%	FY2025 **2.5%** $486,000 of $19.1M · median town 11.5%	Net of state charges, FY2025 **2.1%** FY2010: 2.0% · median town 10.0%

West Newbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

West Newbury's state aid did not keep pace with either price measure: FY2025 aid was 10.8% below its FY2006 aid grown by Boston-area consumer prices and 20.8% below grown by the government price index.

Gross state aid went from $351,000 in FY2006 to $486,000 in FY2025, +38.3% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+62.9%** $246,000 to $401,000 · all towns +54.0%	All fixed costs, FY2016–25 **+75.8%** $897,000 to $1.6M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Newbury's health insurance would have been $307,000 in FY2025; it was $401,000, $93,000 above the path. Its fixed costs would have been $1.12 million in FY2025; it was $1.58 million, $456,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Newbury came to $175,000, 113.2% of the $155,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$175,000	113.2%	28.2%
Placed in the town	$175,000	113.2%	42.3%
Everything placed	$175,000	113.2%	45.2%

SCHOOLS

West Newbury's required school contribution is 2.1% of median household income, 304th highest of 351.

Chapter 70 aid, FY2026 **$3M** attributed to the town	Required local contribution **$6.3M** FY2026
Share of household income **2.1%** 304th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–3%** after inflation

West Newbury has no school district of its own. Its pupils attend West Newbury, Pentucket and Whittier; West Newbury accounts for 100%, 25% and 1% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

West Newbury received $3 million in earmarks placed in the town and competitive grants over ten years, 11% more than the $2.7 million its size, need and institutions predict.

PEERS

West Newbury ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Newbury this town	**48**	**$10,655**	**$574**	**$38.12**	**0.91**	**2.1%**
Bolton peer	35	$8,127	$737	$62.75	1.64	2.8%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Boxford peer	39	$9,338	$156	$74.78	0.46	2.6%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
Edgartown lowest in class of 30	55	$9,919	$2,500	$0	0.36	3.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

West Springfield

City · Hampden County · 28,772 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
6th Hampden · Michael J. Finn	**Hampden and Hampshire** · John C. Velis	**West Springfield Public Schools**, the city's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

West Springfield scores 57 on the Fairness Index for all state aid and 51 for discretionary money. Fifty is a fair share.

ALL STATE AID

57 / 100

62nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	48	57	64

Rank under other weightings: 51st to 83rd.

Weighting-dependent: the range crosses the 45–55 band

West Springfield received more than its share of state aid on three of four measures; its blended score of 57 stays between 54 and 60 under every weighting tested.

DISCRETIONARY MONEY ONLY

51 / 100

182nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	41	53	57

Rank under other weightings: 167th to 194th.

Near fair: between 45 and 55 under every weighting

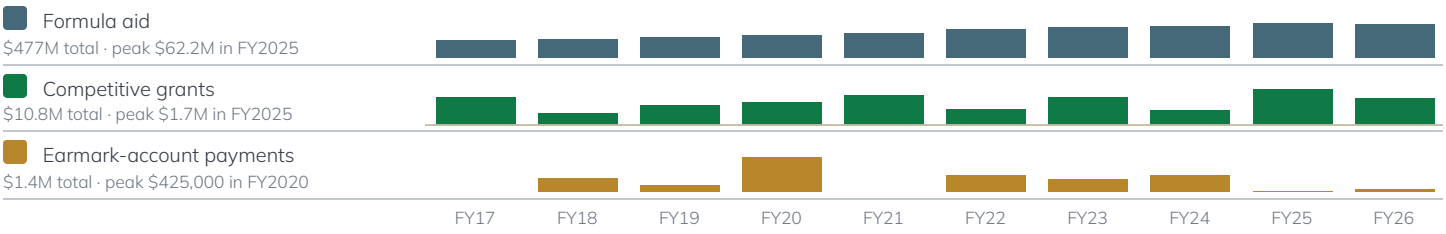
West Springfield received more than its share of discretionary money on three of four measures; its blended score of 51 stays between 49 and 53 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Springfield's town government and school districts received $477 million in formula aid and $10.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$477M	**$10.8M**	**$1.4M**
$16,581 per resident (52nd of 351) · gross	$376 per resident (181st of 351)	$47.38 per resident (84th of 351)

Competitive grants to West Springfield were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $35.1 million, are not shown.

EARMARKS

West Springfield received $2.4 million in local earmarks naming the town, $2.5 million placed in the town and $2.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.4M	**$2.5M**	**$2.5M**	**Not a member**
$84.11 per resident (67th of 351)	$86.72 per resident (91st of 351)	$86.72 per resident (97th of 351)	35 municipalities had none

Placed in the town: 29 clauses in ten of ten budgets; the most recent in FY2026. $2.4 million came in clauses that name West Springfield; the other $75,000 went to organizations based in West Springfield, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$200,000	"piper road corridor traffic and public safety improvement projects in West Springfield"	Enacted names the town
FY2021	$200,000	"increased opportunities for safe outdoor recreation programs in the town of West Springfield"	Enacted names the town
FY2020	$175,000	"recreation programs in the town of West Springfield"	Enacted names the town
FY2018	$175,000	"handicap accessibility to municipally owned buildings in West Springfield"	Enacted names the town
FY2017	$175,000	"handicap accessibility to municipally owned buildings in West Springfield"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, West Springfield received 82% of its proportional share of competitive grant awards.

Local road miles **121.7** 60th of 351 · 4.2 per 1,000 residents (271st of 351)	Town-owned bridges, replacement cost **$8.3M** scored exposure $4.5M · none in poor condition	Road-stream crossings **116** 83rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **16.7 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **28,772** residents plus seasonal	Core infrastructure index **0.69** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **12 acres** 0.1% of land area · FY2026	State-owned land PILOT, FY2026 **$806** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$66.23** statewide $117 · FY2026	New growth per resident **$13,375** FY2017–2025 · 276th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 37.8% of West Springfield's general-fund spending in FY2025, up from 22.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **22.1%** $18.5M of $83.6M · median town 14.1%	FY2016 **29.9%** $27.5M of $92.1M · median town 12.2%	FY2025 **37.8%** $49.9M of $132M · median town 11.5%	Net of state charges, FY2025 **33.5%** FY2010: 23.7% · median town 10.0%

West Springfield's state aid kept pace with both price measures: FY2025 aid was 74.0% above its FY2006 aid grown by Boston-area consumer prices and 54.7% above grown by the government price index.

Gross state aid went from $18.5 million in FY2006 to $49.9 million in FY2025, +169.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+78.3%** $12.6M to $22.5M · all towns +54.0%	All fixed costs, FY2016–25 **+64.3%** $17.1M to $28.1M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Springfield's health insurance would have been $15.8 million in FY2025; it was $22.5 million, $6.74 million above the path. Its fixed costs would have been $21.4 million in FY2025; it was $28.1 million, $6.74 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Springfield came to $2.3 million, 23.5% of the $9.88 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.3M	23.5%	28.2%
Placed in the town	$2.4M	24.2%	42.3%
Everything placed	$2.4M	24.2%	45.2%

SCHOOLS

West Springfield's required school contribution is 2.9% of median household income, 108th highest of 351.

Chapter 70 aid, FY2026 **$47.1M** to the town's district	Required local contribution **$25.5M** FY2026
Share of household income **2.9%** 108th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+40%** after inflation

West Springfield runs its own school district.

EXPECTED AND ACTUAL

West Springfield received $14.6 million in earmarks placed in the town and competitive grants over ten years, about the $14.5 million its size, need and institutions predict.

PEERS

West Springfield ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Springfield this town	**57**	**$16,581**	**$376**	**$86.72**	**0.82**	**2.9%**
Webster peer	55	$14,621	$927	$27.75	0.46	2.8%
Westfield peer	52	$14,111	$235	$64.11	0.63	2.6%
Leominster peer	58	$16,497	$382	$54.84	1.58	2.5%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Amherst peer	36	$8,017	$722	$84.88	2.44	3.7%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

West Stockbridge

Town · Berkshire County · 1,250 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
3rd Berkshire · Leigh Davis
The author was a candidate for this seat in 2024.

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Berkshire Hills Regional School District, shared with Great Barrington and Stockbridge

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

West Stockbridge scores 43 on the Fairness Index for all state aid and 53 for discretionary money. Fifty is a fair share.

ALL STATE AID

43 / 100
178th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	45	43	44

Rank under other weightings: 169th to 203rd.

Stable low: below 45 under every weighting

West Stockbridge received less than its share of state aid on all four measures; its blended score of 43 stays between 42 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

53 / 100
173rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
54	58	41	58

Rank under other weightings: 160th to 191st.

Weighting-dependent: the range crosses the 45–55 band

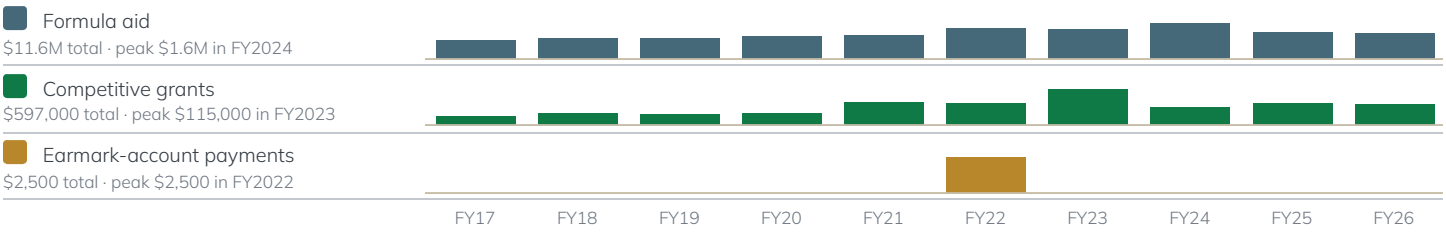
West Stockbridge received more than its share of discretionary money on three of four measures; its blended score of 53 stays between 49 and 56 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Stockbridge's town government and school districts received $11.6 million in formula aid and $597,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$11.6M	**$597,000**	**$2,500**
$9,304 per resident (206th of 351) · gross	$478 per resident (143rd of 351)	$2 per resident (314th of 351)

Competitive grants to West Stockbridge were spread across the decade; no year exceeded 20% of the total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

No local earmark was placed in West Stockbridge in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,500 in payments to West Stockbridge's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in West Stockbridge.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: West Stockbridge's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Richmond	$0	$0	$0	$0
Egremont	$0	$485,000	$485,000	$394
Blandford	$0	$0	$0	$0
Worthington	$60,000	$60,000	$60,000	$58.77
Erving	$0	$0	$0	$0

WHAT THE TOWN CARRIES

Measured against what it maintains, West Stockbridge received 46% of its proportional share of competitive grant awards.

Local road miles **35.9** 309th of 351 · 28.7 per 1,000 residents (43rd of 351)	Town-owned bridges, replacement cost **$6.3M** scored exposure $1.2M · none in poor condition	Road-stream crossings **78** 172nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **18.5 sq mi** 11% state-owned	Seasonal homes **33%** share of housing units	Peak service population **1,875** residents plus seasonal	Core infrastructure index **0.68** roads, culverts, dams, coast, flood, energy

Burden index 0.46; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **963 acres** 8.2% of land area · FY2026	State-owned land PILOT, FY2026 **$154,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$160** statewide $117 · FY2026	New growth per resident **$32,237** FY2017–2025 · 96th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.8% of West Stockbridge's general-fund spending in FY2025, up from 2.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **2.7%** $110,000 of $4M · median town 14.1%	FY2016 **2.6%** $125,000 of $4.8M · median town 12.2%	FY2025 **3.8%** $274,000 of $7.3M · median town 11.5%	Net of state charges, FY2025 **3.7%** FY2010: 2.3% · median town 10.0%

West Stockbridge's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $318,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

West Stockbridge's state aid kept pace with both price measures: FY2025 aid was 61.2% above its FY2006 aid grown by Boston-area consumer prices and 43.3% above grown by the government price index.

Gross state aid went from $110,000 in FY2006 to $274,000 in FY2025, +150.0% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+75.4%** $134,000 to $234,000 · all towns +54.0%	All fixed costs, FY2016–25 **+97.5%** $293,000 to $578,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Stockbridge's health insurance would have been $167,000 in FY2025; it was $234,000, $68,000 above the path. Its fixed costs would have been $365,000 in FY2025; it was $578,000, $212,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Stockbridge came to $0, 0.0% of the $101,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

West Stockbridge's required school contribution is 2.4% of median household income, 266th highest of 351.

Chapter 70 aid, FY2026 **$358,000** attributed to the town	Required local contribution **$1.4M** FY2026
Share of household income **2.4%** 266th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

West Stockbridge has no school district of its own. Its pupils attend Berkshire Hills; West Stockbridge accounts for 11% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

West Stockbridge received $597,000 in earmarks placed in the town and competitive grants over ten years, 19% of the $3.2 million its size, need and institutions predict.

PEERS

West Stockbridge is one of six municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Stockbridge this town	**43**	**$9,304**	**$478**	**$0**	**0.46**	**2.4%**
Richmond peer · lowest in class of 30	40	$8,072	$776	$0	0.19	2.2%
Egremont peer · best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%
Blandford peer	52	$10,142	$5,405	$0	0.80	2.6%
Worthington peer	45	$10,665	$2,563	$58.77	0.59	2.8%
Erving peer	50	$7,326	$3,750	$0	8.12	4.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

DUKES COUNTY

West Tisbury

Town · Dukes County · 3,080 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

Barnstable-Dukes-Nantucket · Thomas W. Moakley

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Martha's Vineyard Regional School District, shared with Aquinnah, Chilmark, Edgartown, Oak Bluffs and Tisbury

Up-Island Regional School District, shared with Aquinnah and Chilmark

REGIONAL PLANNING AGENCY

Martha's Vineyard Commission

FAIRNESS INDEX

West Tisbury scores 52 on the Fairness Index for all state aid and 44 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

102nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	69	43	52

Rank under other weightings: 69th to 135th.

Weighting-dependent: the range crosses the 45–55 band

West Tisbury received less than its share of state aid on two of four measures; its blended score of 52 stays between 47 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

44 / 100

208th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	63	26	46

Rank under other weightings: 188th to 230th.

Weighting-dependent: the range crosses the 45–55 band

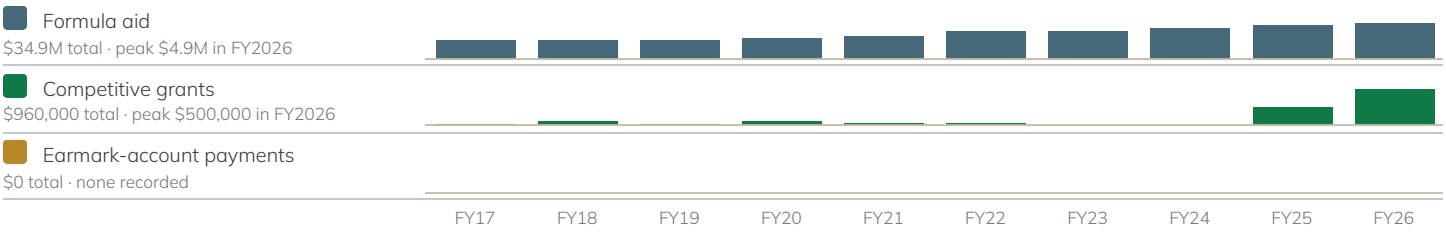
West Tisbury received less than its share of discretionary money on three of four measures; its blended score of 44 stays between 37 and 50 under every weighting tested.

STATE MONEY, FY2017–FY2026

West Tisbury's town government and school districts received $34.9 million in formula aid and $960,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$34.9M	**$960,000**	**$0**
$11,333 per resident (139th of 351) · gross	$312 per resident (203rd of 351)	$0 per resident (339th of 351)

Competitive grants to West Tisbury peaked in FY2026 at $500,000, 52% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.2 million, are not shown.

EARMARKS

West Tisbury received $0 in local earmarks naming the town, $45,000 placed in the town and $45,000 counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$45,000**	**$45,000**	**Not a member**
enacted, ten budgets	$14.61 per resident (294th of 351)	$14.61 per resident (295th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2026. $0 came in clauses that name West Tisbury; the other $45,000 went to organizations based in West Tisbury, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$25,000	"Martha's Vineyard Community Foundation, Inc. to provide transportation services to older adults on Martha's Vineyard"	Enacted recipient based here
FY2026	$20,000	"Martha's Vineyard Community Foundation, Inc. for costs associated with transportation for older adults on Martha's Vineyard"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, West Tisbury received 59% of its proportional share of competitive grant awards.

Local road miles **14.2** 347th of 351 · 4.6 per 1,000 residents (256th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **70** 196th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **25.0 sq mi** 15% state-owned	Seasonal homes **48%** share of housing units	Peak service population **6,224** residents plus seasonal	Core infrastructure index **0.32** roads, culverts, dams, coast, flood, energy

Burden index 0.59; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,475 acres** 15.4% of land area · FY2026	State-owned land PILOT, FY2026 **$1.7M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$679** statewide $117 · FY2026	New growth per resident **$95,161** FY2017–2025 · 10th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 6.7% of West Tisbury's general-fund spending in FY2025, up from 5.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.9%** $720,000 of $12.1M · median town 14.1%	FY2016 **6.9%** $1.2M of $17.1M · median town 12.2%	FY2025 **6.7%** $1.7M of $25.4M · median town 11.5%	Net of state charges, FY2025 **5.9%** FY2010: 5.3% · median town 10.0%

West Tisbury's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

West Tisbury's state aid kept pace with both price measures: FY2025 aid was 53.1% above its FY2006 aid grown by Boston-area consumer prices and 36.0% above grown by the government price index.

Gross state aid went from $720,000 in FY2006 to $1.7 million in FY2025, +137.4% in dollars. Flag: in FY2010, $237,000 of West Tisbury's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+54.7%** $646,000 to $1,000,000 · all towns +54.0%	All fixed costs, FY2016–25 **+65.2%** $1.1M to $1.8M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, West Tisbury's health insurance would have been $807,000 in FY2025; it was $1,000,000, $193,000 above the path. Its fixed costs would have been $1.36 million in FY2025; it was $1.80 million, $439,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming West Tisbury came to $0, 0.0% of the $353,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$25,000	7.1%	42.3%
Everything placed	$25,000	7.1%	45.2%

SCHOOLS

West Tisbury's required school contribution is 2.5% of median household income, 211th highest of 351.

Chapter 70 aid, FY2026 **$1.4M** attributed to the town	Required local contribution **$5.1M** FY2026
Share of household income **2.5%** 211th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **−1%** after inflation

West Tisbury has no school district of its own. Its pupils attend Upisland and Martha's Vineyard; West Tisbury accounts for 70% and 17% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

West Tisbury received $3.7 million in earmarks placed in the town and competitive grants over ten years, 80% of the $4.7 million its size, need and institutions predict.

PEERS

West Tisbury ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
West Tisbury this town	**52**	**$11,333**	**$312**	**$14.61**	**0.59**	**2.5%**
Manchester-by-the-Sea peer	34	$6,434	$696	$60.01	2.44	1.6%
Sherborn peer	39	$9,422	$708	$109	0.88	2.7%
Dover peer	37	$8,305	$138	$99.67	1.08	2.4%
Carlisle peer	35	$7,968	$280	$4.77	0.70	2.1%
Lincoln peer · best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Chilmark lowest in class of 30	33	$5,153	$334	$0	0.74	1.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Westborough

Town · Worcester County · 21,944 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

19th Worcester · Kate Donaghue
84% of residents
11th Worcester · Hannah Kane 16% of residents
Westborough is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Second Worcester · Michael O. Moore

SCHOOL DISTRICTS

Westborough Public Schools, the town's own district
Assabet Valley Regional Vocational Technical School District, vocational, shared with Berlin, Hudson, Marlborough, Maynard, Northborough and Southborough

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Westborough scores 30 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100
310th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
31	39	23	25

Rank under other weightings: 295th to 328th.

Stable low: below 45 under every weighting

Westborough received less than its share of state aid on all four measures; its blended score of 29 stays between 26 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100
274th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	36	22	23

Rank under other weightings: 271st to 284th.

Stable low: below 45 under every weighting

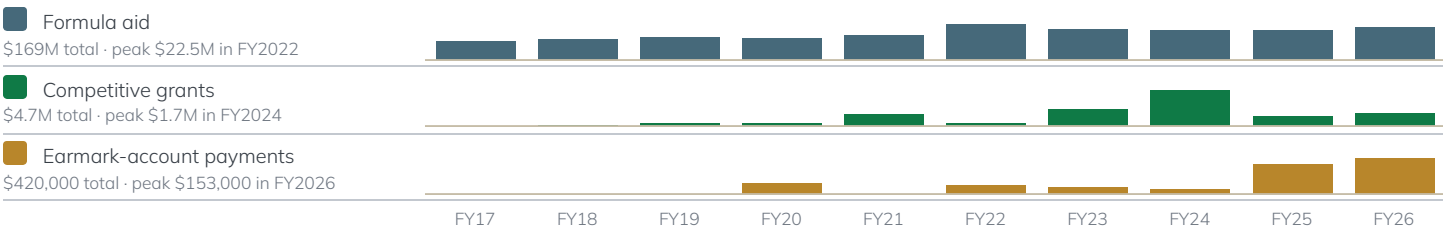
Westborough received less than its share of discretionary money on all four measures; its blended score of 27 stays between 24 and 30 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westborough's town government and school districts received $169 million in formula aid and $4.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$169M	$4.7M	$420,000
$7,679 per resident (269th of 351) · gross	$215 per resident (245th of 351)	$19.13 per resident (208th of 351)

Competitive grants to Westborough peaked in FY2024 at $1.7 million, 37% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $25 million, are not shown.

EARMARKS

Westborough received $475,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$475,000	$475,000	$475,000	Not a member
$21.64 per resident (263rd of 351)	$21.64 per resident (273rd of 351)	$21.64 per resident (273rd of 351)	35 municipalities had none

Placed in the town: 11 clauses in seven of ten budgets; the most recent in FY2026. Every one names Westborough directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$75,000	"the town of Westborough, for repairing or replacing the Piccadilly Brook bridge, securing and restoring the affected part of Piccadilly brook as it…"	Enacted names the town
FY2025	$57,000	"the town of Westborough for the purchase of gear and equipment for the Westborough fire department"	Enacted names the town
FY2020	$50,000	"the purchase and installation of air conditioning units at the Forbes community building in the town of Westborough"	Enacted names the town
FY2017	$50,000	"the planning and celebration of the three-hundredth anniversary of the town of Westborough"	Enacted names the town
FY2024	$45,000	"the town of Westborough for the restoration efforts of Cedar swamp"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Westborough received 1.49 times its proportional share of competitive grant awards.

Local road miles **95.5** 105th of 351 · 4.4 per 1,000 residents (267th of 351)	Town-owned bridges, replacement cost **$6M** scored exposure $879,000 · none in poor condition	Road-stream crossings **182** 19th of 351 · culverts and small crossings	Town-owned hazard dams **2** high or significant hazard
Land area **20.6 sq mi** 14% state-owned	Seasonal homes **0%** share of housing units	Peak service population **21,944** residents plus seasonal	Core infrastructure index **1.03** roads, culverts, dams, coast, flood, energy

Burden index 1.49; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,030 acres** 7.8% of land area · FY2026	State-owned land PILOT, FY2026 **$185,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$179** statewide $117 · FY2026	New growth per resident **$54,111** FY2017–2025 · 31st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.0% of Westborough's general-fund spending in FY2025, down from 11.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.9%** $7.7M of $65.2M · median town 14.1%	FY2016 **10.6%** $9M of $85M · median town 12.2%	FY2025 **11.0%** $14.1M of $128M · median town 11.5%	Net of state charges, FY2025 **10.5%** FY2010: 12.4% · median town 10.0%

Westborough's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $361,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westborough's state aid kept pace with both price measures: FY2025 aid was 17.7% above its FY2006 aid grown by Boston-area consumer prices and 4.6% above grown by the government price index.

Gross state aid went from $7.7 million in FY2006 to $14.1 million in FY2025, +82.5% in dollars. Flag: in FY2010, $3.8 million of Westborough's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+78.7%** $8M to $14.4M · all towns +54.0%	All fixed costs, FY2016–25 **+91.4%** $12.5M to $23.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **7 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westborough's health insurance would have been $10 million in FY2025; it was $14.4 million, $4.32 million above the path. Its fixed costs would have been $15.6 million in FY2025; it was $23.9 million, $8.32 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westborough came to $353,000, 5.6% of the $6.33 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$353,000	5.6%	28.2%
Placed in the town	$353,000	5.6%	42.3%
Everything placed	$353,000	5.6%	45.2%

SCHOOLS

Westborough's required school contribution is 3.7% of median household income, 8th highest of 351.

Chapter 70 aid, FY2026 **$13.2M** to the town's district	Required local contribution **$42.2M** FY2026
Share of household income **3.7%** 8th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+53%** after inflation

Westborough runs its own school district and also belongs to Assabet Valley; Westborough accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Westborough received $5.4 million in earmarks placed in the town and competitive grants over ten years, 51% of the $10.6 million its size, need and institutions predict.

PEERS

Westborough ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westborough this town	**30**	**$7,679**	**$215**	**$21.64**	**1.49**	**3.7%**
Stoneham peer	28	$6,600	$119	$85.70	1.97	2.6%
Sandwich peer	30	$7,257	$332	$24.72	0.71	2.7%
Easton peer	30	$7,249	$236	$53.96	1.08	3.3%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Dedham peer	28	$6,510	$161	$81.43	0.48	2.4%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Westfield

City · Hampden County · 40,378 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Hampden · Kelly W. Pease 91% of residents
6th Hampden · Michael J. Finn 9% of residents

Westfield is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampden and Hampshire · John C. Velis

SCHOOL DISTRICTS

Westfield Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Westfield scores 52 on the Fairness Index for all state aid and 35 for discretionary money. Fifty is a fair share.

ALL STATE AID

52 / 100

109th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
53	44	56	54

Rank under other weightings: 86th to 135th.

Near fair: between 45 and 55 under every weighting

Westfield received more than its share of state aid on three of four measures; its blended score of 52 stays between 50 and 54 under every weighting tested.

DISCRETIONARY MONEY ONLY

35 / 100

246th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	28	40	37

Rank under other weightings: 226th to 258th.

Stable low: below 45 under every weighting

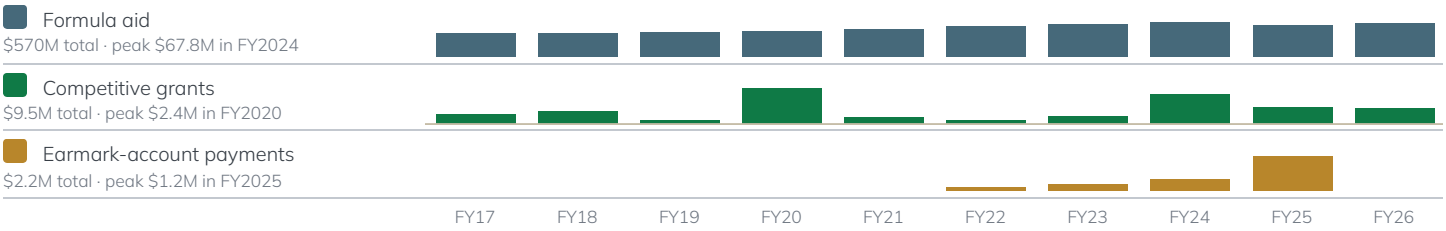
Westfield received less than its share of discretionary money on all four measures; its blended score of 35 stays between 33 and 37 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westfield's town government and school districts received $570 million in formula aid and $9.5 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$570M	$9.5M	$2.2M
$14,111 per resident (92nd of 351) · gross	$235 per resident (232nd of 351)	$53.29 per resident (72nd of 351)

Competitive grants to Westfield peaked in FY2020 at $2.4 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $30.9 million, are not shown.

EARMARKS

Westfield received $2.5 million in local earmarks naming the town, $2.6 million placed in the town and $3.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.5M	$2.6M	$3.1M	Not a member
$62.25 per resident (112th of 351)	$64.11 per resident (131st of 351)	$77.73 per resident (107th of 351)	35 municipalities had none

Placed in the town: 45 clauses in ten of ten budgets; the most recent in FY2026. $2.3 million came in clauses that name Westfield; the other $250,000 went to organizations based in Westfield, some of which serve a wider area.

Names the town includes $175,000 in clauses that name Westfield but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $550,000 in four clauses for state facilities located in Westfield (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$1M	"improvements and renovations at Westfield high school"	Enacted names the town
FY2021	$100,000	"Baystate Noble Hospital Corporation for a grant program to prevent and treat the increase of addiction to opioids and related substances during the…"	Enacted recipient based here
FY2020	$100,000	"Baystate Noble Hospital Corporation in the city of Westfield for a grant program to prevent and treat opioid addiction and related substance addiction"	Enacted names the town
FY2023	$75,000	"Baystate Noble Hospital in the city of Westfield for a grant program to prevent and treat addiction to opioids and related substances"	Enacted names the town
FY2022	$75,000	"Baystate Noble Hospital for a grant program to prevent and treat addiction to opioids and related substances"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Westfield received 63% of its proportional share of competitive grant awards.

Local road miles **194.0** 19th of 351 · 4.8 per 1,000 residents (242nd of 351)	Town-owned bridges, replacement cost **$24.2M** scored exposure $7.6M · two in poor condition	Road-stream crossings **172** 27th of 351 · culverts and small crossings	Town-owned hazard dams **4** high or significant hazard
Land area **46.3 sq mi** 2% state-owned	Seasonal homes **1%** share of housing units	Peak service population **40,599** residents plus seasonal	Core infrastructure index **0.76** roads, culverts, dams, coast, flood, energy

Burden index 0.63; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **935 acres** 3.2% of land area · FY2026	State-owned land PILOT, FY2026 **$199,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$213** statewide $117 · FY2026	New growth per resident **$10,460** FY2017–2025 · 313th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 32.1% of Westfield's general-fund spending in FY2025, down from 40.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **40.6%** $40.1M of $98.8M · median town 14.1%	FY2016 **32.2%** $41.7M of $129M · median town 12.2%	FY2025 **32.1%** $54.2M of $169M · median town 11.5%	Net of state charges, FY2025 **27.9%** FY2010: 38.2% · median town 10.0%

Westfield's state aid did not keep pace with either price measure: FY2025 aid was 12.9% below its FY2006 aid grown by Boston-area consumer prices and 22.6% below grown by the government price index.

Gross state aid went from $40.1 million in FY2006 to $54.2 million in FY2025, +35.1% in dollars. Flag: in FY2010, $3.7 million of Westfield's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+53.3%** $18.2M to $27.9M · all towns +54.0%	All fixed costs, FY2016–25 **+48.6%** $25M to $37.1M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westfield's health insurance would have been $22.8 million in FY2025; it was $27.9 million, $5.17 million above the path. Its fixed costs would have been $31.2 million in FY2025; it was $37.1 million, $5.92 million above the path.

Flag: fixed costs changed by more than 30% in one year in FY2020 (+55%) and FY2023 (−34%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westfield came to $2.2 million, 23.0% of the $9.71 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$2.2M	23.0%	28.2%
Placed in the town	$2.5M	25.5%	42.3%
Everything placed	$2.9M	29.4%	45.2%

SCHOOLS

Westfield's required school contribution is 2.6% of median household income, 201st highest of 351.

Chapter 70 aid, FY2026 **$45.1M** to the town's district	Required local contribution **$35.6M** FY2026
Share of household income **2.6%** 201st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+16%** after inflation

Westfield runs its own school district.

EXPECTED AND ACTUAL

Westfield received $13.4 million in earmarks placed in the town and competitive grants over ten years, 81% of the $16.6 million its size, need and institutions predict.

PEERS

Westfield ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westfield this town	**52**	**$14,111**	**$235**	**$64.11**	**0.63**	**2.6%**
Leominster peer	58	$16,497	$382	$54.84	1.58	2.5%
West Springfield peer	57	$16,581	$376	$86.72	0.82	2.9%
Taunton peer	59	$17,881	$149	$94.33	0.82	2.7%
Everett peer	68	$22,244	$337	$121	2.38	3.1%
Attleboro peer	48	$13,064	$110	$32.30	0.33	2.7%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
Belchertown lowest in class of 30	49	$13,722	$401	$15.27	2.92	2.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

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SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Westford

Town · Middlesex County · 24,690 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Middlesex · James Arciero

STATE SENATE

Worcester and Middlesex · John J. Cronin

SCHOOL DISTRICTS

Westford Public Schools, the town's own district

Nashoba Valley Regional Vocational Technical School District, vocational, shared with Ayer, Chelmsford, Groton, Littleton, Pepperell, Shirley and Townsend

REGIONAL PLANNING AGENCY

Northern Middlesex Council Of Governments

FAIRNESS INDEX

Westford scores 45 on the Fairness Index for all state aid and 55 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

164th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	64	33	39

Rank under other weightings: 132nd to 213th.

Weighting-dependent: the range crosses the 45–55 band

Westford received less than its share of state aid on three of four measures; its blended score of 45 stays between 39 and 50 under every weighting tested.

DISCRETIONARY MONEY ONLY

55 / 100

162nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
51	70	51	46

Rank under other weightings: 148th to 183rd.

Weighting-dependent: the range crosses the 45–55 band

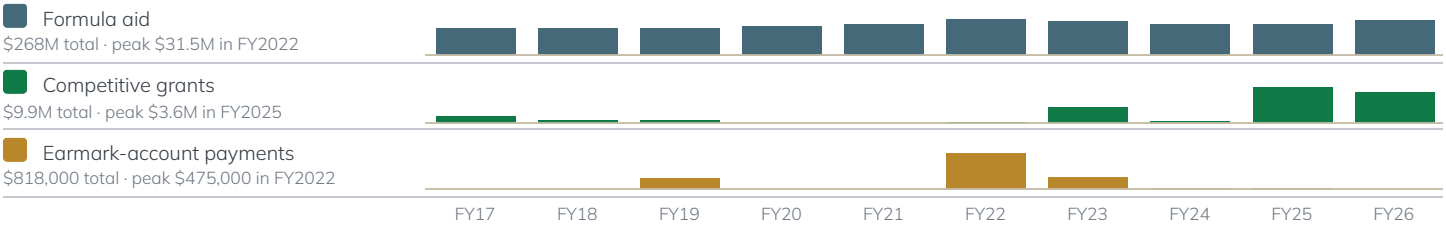
Westford received more than its share of discretionary money on three of four measures; its blended score of 55 stays between 51 and 58 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westford's town government and school districts received $268 million in formula aid and $9.9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$268M	**$9.9M**	**$818,000**
$10,874 per resident (151st of 351) · gross	$400 per resident (171st of 351)	$33.14 per resident (136th of 351)

Competitive grants to Westford peaked in FY2025 at $3.6 million, 36% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $19.1 million, are not shown.

EARMARKS

Westford received $1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1M	**$1M**	**$1M**	**Not a member**
$41.76 per resident (175th of 351)	$41.76 per resident (195th of 351)	$41.76 per resident (198th of 351)	35 municipalities had none

Placed in the town: 14 clauses in nine of ten budgets; the most recent in FY2026. Every one names Westford directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$125,000	"the renovation of the playground at the Robinson Elementary School in the town of Westford"	Enacted names the town
FY2026	$100,000	"audiovisual equipment for programming and open or hybrid meeting spaces at the J.V. Fletcher library in the town of Westford"	Enacted names the town
FY2024	$100,000	"the construction, renovation and upgrade of a new playground at the Nabnasset elementary school in the town of Westford"	Enacted names the town
FY2020	$100,000	"a new playground for the Roudenbush Community Center, Inc. in Westford"	Enacted names the town
FY2019	$100,000	"a new playground and improvements to Forge Beach in Westford"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Westford received 1.34 times its proportional share of competitive grant awards.

Local road miles **153.3** 31st of 351 · 6.2 per 1,000 residents (185th of 351)	Town-owned bridges, replacement cost **$13.3M** scored exposure $3.2M · two in poor condition	Road-stream crossings **203** 11th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **30.2 sq mi** 0% state-owned	Seasonal homes **2%** share of housing units	Peak service population **25,248** residents plus seasonal	Core infrastructure index **0.64** roads, culverts, dams, coast, flood, energy

Burden index 1.34; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$403** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$131** statewide $117 · FY2026	New growth per resident **$19,269** FY2017–2025 · 198th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 17.7% of Westford's general-fund spending in FY2025, down from 24.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **24.0%** $16.9M of $70.3M · median town 14.1%	FY2016 **20.7%** $20.5M of $99.1M · median town 12.2%	FY2025 **17.7%** $21.7M of $123M · median town 11.5%	Net of state charges, FY2025 **17.1%** FY2010: 23.5% · median town 10.0%

Westford's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $375,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westford's state aid did not keep pace with either price measure: FY2025 aid was 17.2% below its FY2006 aid grown by Boston-area consumer prices and 26.4% below grown by the government price index.

Gross state aid went from $16.9 million in FY2006 to $21.7 million in FY2025, +28.4% in dollars. Flag: in FY2010, $2.5 million of Westford's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+99.2%** $8.7M to $17.2M · all towns +54.0%	All fixed costs, FY2016–25 **+46.4%** $13.6M to $19.9M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westford's health insurance would have been $10.8 million in FY2025; it was $17.2 million, $6.43 million above the path. Its fixed costs would have been $17 million in FY2025; it was $19.9 million, $2.92 million above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (+34%) and FY2023 (+45%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westford came to $931,000, 10.8% of the $8.59 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$931,000	10.8%	28.2%
Placed in the town	$931,000	10.8%	42.3%
Everything placed	$931,000	10.8%	45.2%

SCHOOLS

Westford's required school contribution is 2.9% of median household income, 111th highest of 351.

Chapter 70 aid, FY2026 **$19.4M** to the town's district	Required local contribution **$47.1M** FY2026
Share of household income **2.9%** 111th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–9%** after inflation

Westford runs its own school district and also belongs to Nashoba Valley; Westford accounts for 12% of that district's foundation budget.

EXPECTED AND ACTUAL

Westford received $10.9 million in earmarks placed in the town and competitive grants over ten years, 92% more than the $5.7 million its size, need and institutions predict.

PEERS

Westford ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westford this town	**45**	**$10,874**	**$400**	**$41.76**	**1.34**	**2.9%**
Acton peer	40	$9,929	$351	$51.13	2.12	3.1%
Reading peer	35	$8,102	$118	$31.24	1.27	2.6%
Walpole peer	30	$6,864	$139	$32.09	0.61	2.6%
Holliston peer	41	$9,911	$189	$129	0.85	3.1%
Sharon peer	35	$8,474	$593	$38.45	1.92	3.1%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Groton lowest in class of 30	49	$12,079	$400	$11.62	1.19	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Westhampton

Town · Hampshire County · 1,552 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Hampshire · Lindsay N. Sabadosa

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Westhampton Public Schools, the town's own district
Hampshire Regional School District, shared with Chesterfield, Goshen, Southampton and Williamsburg

REGIONAL PLANNING AGENCY
Pioneer Valley Planning Commission

FAIRNESS INDEX

Westhampton scores 42 on the Fairness Index for all state aid and 66 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

193rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
46	45	45	32

Rank under other weightings: 167th to 222nd.

Stable low: below 45 under every weighting

Westhampton received less than its share of state aid on all four measures; its blended score of 42 stays between 40 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

66 / 100

122nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
74	73	56	61

Rank under other weightings: 111th to 134th.

Stable high: above 55 under every weighting

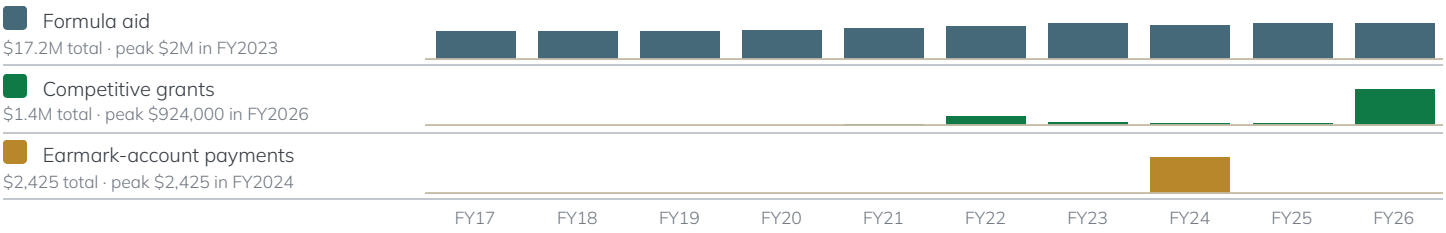
Westhampton received more than its share of discretionary money on all four measures; its blended score of 66 stays between 62 and 70 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westhampton's town government and school districts received $17.2 million in formula aid and $1.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$17.2M	**$1.4M**	**$2,425**
$11,067 per resident (145th of 351) · gross	$887 per resident (84th of 351)	$1.56 per resident (320th of 351)

Competitive grants to Westhampton peaked in FY2026 at $924,000, 67% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1.6 million, are not shown.

EARMARKS

No local earmark was placed in Westhampton in ten enacted budgets, FY2017 to FY2026, on any of the three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$0	**$0**	**$0**	**Member**
enacted, ten budgets	enacted, ten budgets	enacted, ten budgets	one of 35 municipalities

The Comptroller records $2,425 in payments to Westhampton's town government and school districts from accounts classified as earmarks over the same ten years. Those accounts can carry prior-year and statewide-program money; no enacted clause was placed in Westhampton.

The Losers Club is the project's name for the 35 cities and towns with no earmark placed in them in any of the ten budgets. It counts enacted earmarks only. Several members won competitive grants in the same years; those appear under State money above.

Local earmarks in the same ten budgets: Westhampton's five nearest peers (enacted)

Municipality	Names the town	Placed in the town	Everything placed	Placed, per resident
Russell	$135,000	$135,000	$135,000	$113
Pelham	$16,000	$16,000	$16,000	$11.86
Chesterfield	$0	$225,000	$225,000	$213
Holland	$100,000	$100,000	$100,000	$38.71
Phillipston	$150,000	$150,000	$150,000	$79.16

WHAT THE TOWN CARRIES

Measured against what it maintains, Westhampton received 62% of its proportional share of competitive grant awards.

Local road miles **43.8** 274th of 351 · 28.2 per 1,000 residents (44th of 351)	Town-owned bridges, replacement cost **$18.7M** scored exposure $5.6M · one in poor condition	Road-stream crossings **44** 284th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **27.2 sq mi** 1% state-owned	Seasonal homes **14%** share of housing units	Peak service population **1,804** residents plus seasonal	Core infrastructure index **1.03** roads, culverts, dams, coast, flood, energy

Burden index 0.62; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **128 acres** 0.7% of land area · FY2026	State-owned land PILOT, FY2026 **$4,176** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$32.64** statewide $117 · FY2026	New growth per resident **$18,489** FY2017–2025 · 209th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.1% of Westhampton's general-fund spending in FY2025, down from 12.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **12.6%** $444,000 of $3.5M · median town 14.1%	FY2016 **14.8%** $744,000 of $5M · median town 12.2%	FY2025 **10.1%** $864,000 of $8.5M · median town 11.5%	Net of state charges, FY2025 **9.2%** FY2010: 11.9% · median town 10.0%

Westhampton's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $410,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westhampton's state aid kept pace with both price measures: FY2025 aid was 25.5% above its FY2006 aid grown by Boston-area consumer prices and 11.6% above grown by the government price index.

Gross state aid went from $444,000 in FY2006 to $864,000 in FY2025, +94.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+79.8%** $308,000 to $554,000 · all towns +54.0%	All fixed costs, FY2016–25 **+41.5%** $577,000 to $816,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westhampton's health insurance would have been $385,000 in FY2025; it was $554,000, $169,000 above the path. Its fixed costs would have been $720,000 in FY2025; it was $816,000, $96,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westhampton came to $0, 0.0% of the $246,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$0	0.0%	28.2%
Placed in the town	$0	0.0%	42.3%
Everything placed	$0	0.0%	45.2%

SCHOOLS

Westhampton's required school contribution is 3.3% of median household income, 27th highest of 351.

Chapter 70 aid, FY2026 **$904,000** to the town's district	Required local contribution **$2M** FY2026
Share of household income **3.3%** 27th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+2%** after inflation

Westhampton runs its own district for some grades and belongs to Hampshire for others; Westhampton accounts for 14% of that district's foundation budget.

EXPECTED AND ACTUAL

Westhampton received $1.5 million in earmarks placed in the town and competitive grants over ten years, 63% of the $2.4 million its size, need and institutions predict.

PEERS

Westhampton is one of three municipalities, among itself and its ten nearest peers, with no earmarks placed in them in the ten budgets.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westhampton this town	**42**	**$11,067**	**$887**	**$0**	**0.62**	**3.3%**
Russell peer	73	$25,758	$6,140	$113	1.29	2.4%
Pelham peer	47	$13,701	$594	$11.86	2.69	2.5%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
Holland peer	45	$10,480	$1,150	$38.71	0.46	2.7%
Phillipston peer	50	$12,743	$1,191	$79.16	1.39	2.9%
New Braintree best in class of 30	55	$17,191	$1,081	$298	1.25	3.1%
Petersham lowest in class of 30	56	$19,509	$612	$0	0.99	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Westminster

Town · Worcester County · 8,374 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Worcester · Kimberly N. Ferguson

STATE SENATE
Worcester and Hampshire · Peter J. Durant

SCHOOL DISTRICTS
Ashburnham-Westminster Regional School District, shared with Ashburnham
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY
Montachusett Regional Planning Commission

FAIRNESS INDEX

Westminster scores 48 on the Fairness Index for all state aid and 13 for discretionary money. Fifty is a fair share.

ALL STATE AID

48 / 100

138th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
48	57	41	47

Rank under other weightings: 125th to 152nd.

Near fair: between 45 and 55 under every weighting

Westminster received less than its share of state aid on three of four measures; its blended score of 48 stays between 46 and 51 under every weighting tested.

DISCRETIONARY MONEY ONLY

13 / 100

339th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
12	16	10	12

Rank under other weightings: 338th to 341st.

Stable low: below 45 under every weighting

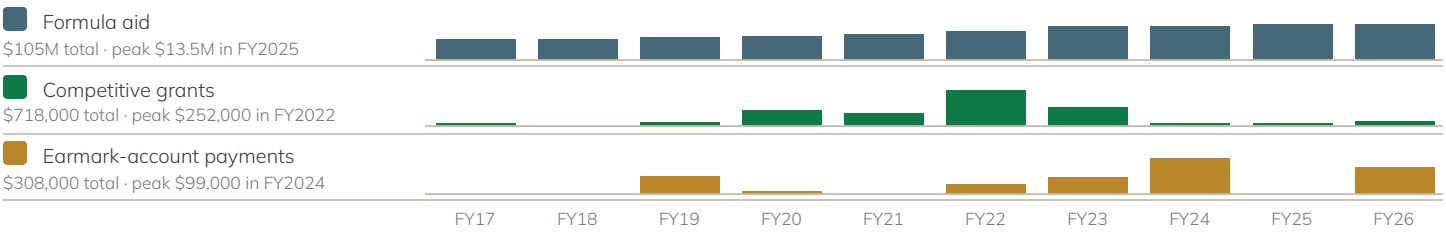
Westminster received less than its share of discretionary money on all four measures; its blended score of 13 stays between 12 and 14 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westminster's town government and school districts received $105 million in formula aid and $718,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$105M	$718,000	$308,000
$12,585 per resident (120th of 351) · gross	$85.79 per resident (333rd of 351)	$36.79 per resident (122nd of 351)

Competitive grants to Westminster peaked in FY2022 at $252,000, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $3.7 million, are not shown.

EARMARKS

Westminster received $230,000 in local earmarks naming the town, $9.3 million placed in the town and $9.3 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$230,000	$9.3M	$9.3M	Not a member
$27.47 per resident (239th of 351)	$1,114 per resident (1st of 351)	$1,114 per resident (2nd of 351)	35 municipalities had none

Placed in the town: 21 clauses in nine of ten budgets; the most recent in FY2026. $230,000 came in clauses that name Westminster; the other $9.1 million went to organizations based in Westminster, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$2M	"the On-Site Academy for critical incident stress management services in support of emergency medical services, fire, corrections officers, and law…"	Enacted recipient based here
FY2025	$1.5M	"the On-Site Academy for critical incident stress management services in support of emergency medical services, fire, corrections officers, and law…"	Enacted recipient based here
FY2024	$1.2M	"the On-Site Academy for critical incident stress management services in support of emergency medical services, fire, corrections and law enforcement…"	Enacted recipient based here
FY2023	$600,000	"On-Site Academy for critical incident stress management services"	Enacted recipient based here
FY2022	$600,000	"On-Site Academy for critical incident stress management services"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Westminster received 30% of its proportional share of competitive grant awards.

Local road miles **89.9** 120th of 351 · 10.7 per 1,000 residents (97th of 351)	Town-owned bridges, replacement cost **$9.6M** scored exposure $2.7M · one in poor condition	Road-stream crossings **111** 93rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **35.4 sq mi** 16% state-owned	Seasonal homes **0%** share of housing units	Peak service population **8,417** residents plus seasonal	Core infrastructure index **0.24** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **3,644 acres** 16.1% of land area · FY2026	State-owned land PILOT, FY2026 **$280,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$76.71** statewide $117 · FY2026	New growth per resident **$21,968** FY2017–2025 · 160th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 4.2% of Westminster's general-fund spending in FY2025, down from 6.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.3%** $857,000 of $13.7M · median town 14.1%	FY2016 **4.3%** $832,000 of $19.2M · median town 12.2%	FY2025 **4.2%** $1.2M of $28.6M · median town 11.5%	Net of state charges, FY2025 **3.9%** FY2010: 4.1% · median town 10.0%

Westminster's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $9.1 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westminster's state aid did not keep pace with either price measure: FY2025 aid was 10.7% below its FY2006 aid grown by Boston-area consumer prices and 20.6% below grown by the government price index.

Gross state aid went from $857,000 in FY2006 to $1.2 million in FY2025, +38.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+52.7%** $816,000 to $1.2M · all towns +54.0%	All fixed costs, FY2016–25 **+75.2%** $1.8M to $3.1M · all towns +53.0%	Years squeezed **8 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westminster's health insurance would have been $1.02 million in FY2025; it was $1.25 million, $227,000 above the path. Its fixed costs would have been $2.19 million in FY2025; it was $3.07 million, $883,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westminster came to $155,000, 36.1% of the $430,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$155,000	36.1%	28.2%
Placed in the town	$7.3M	16.9 times	42.3%
Everything placed	$7.3M	16.9 times	45.2%

SCHOOLS

Westminster's required school contribution is 2.9% of median household income, 98th highest of 351.

Chapter 70 aid, FY2026 **$9M** attributed to the town	Required local contribution **$10.2M** FY2026
Share of household income **2.9%** 98th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+13%** after inflation

Westminster has no school district of its own. Its pupils attend Ashburnham-Westminster and Montachusett; Westminster accounts for 56% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Westminster received $10.1 million in earmarks placed in the town and competitive grants over ten years, 2.7 times the $3.7 million its size, need and institutions predict.

PEERS

Westminster ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westminster this town	**48**	**$12,585**	**$85.79**	**$1,114**	**0.30**	**2.9%**
Sutton peer	44	$10,223	$840	$107	1.91	3.1%
Sterling peer	34	$8,083	$141	$35.44	0.62	2.6%
Millis peer · best in class of 30	39	$9,221	$150	$151	0.75	2.6%
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Wrentham peer	39	$9,318	$289	$48.99	0.85	3.0%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Weston

Town · Middlesex County · 11,579 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
14th Norfolk · Alice Hanlon Peisch	**Third Middlesex** · Michael J. Barrett	**Weston Public Schools**, the town's own district	Metropolitan Area Planning Council

FAIRNESS INDEX

Weston scores 35 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

35 / 100

262nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
34	60	25	22

Rank under other weightings: 211th to 309th.

Stable low: below 45 under every weighting

Weston received less than its share of state aid on three of four measures; its blended score of 35 stays between 28 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

330th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
13	31	14	8

Rank under other weightings: 315th to 336th.

Stable low: below 45 under every weighting

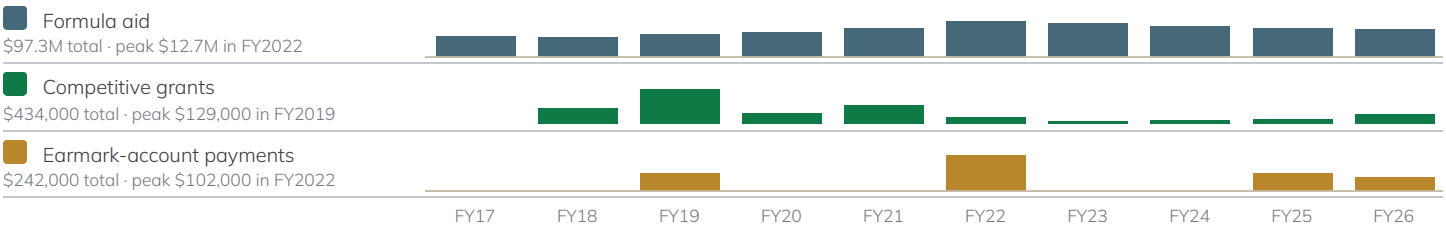
Weston received less than its share of discretionary money on all four measures; its blended score of 17 stays between 13 and 20 under every weighting tested.

STATE MONEY, FY2017–FY2026

Weston's town government and school districts received $97.3 million in formula aid and $434,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$97.3M	**$434,000**	**$242,000**
$8,400 per resident (239th of 351) · gross	$37.49 per resident (350th of 351)	$20.93 per resident (197th of 351)

Competitive grants to Weston peaked in FY2019 at $129,000, 30% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5 million, are not shown.

EARMARKS

Weston received $1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1M	**$1M**	**$1M**	**Not a member**
$87.66 per resident (63rd of 351)	$87.66 per resident (90th of 351)	$87.66 per resident (96th of 351)	35 municipalities had none

Placed in the town: 13 clauses in eight of ten budgets; the most recent in FY2026. Every one names Weston directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$150,000	"water tank improvement and other related costs in the town of Weston"	Enacted names the town
FY2024	$150,000	"water tank improvement and other related costs in the town of Weston"	Enacted names the town
FY2023	$150,000	"water tank improvement and other related costs in the town of Weston"	Enacted names the town
FY2022	$100,000	"the revitalization of the town center in the town of Weston"	Enacted names the town
FY2020	$100,000	"improving sidewalks, connecting streets, increasing pedestrian lighting, and town center associated costs in Weston"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Weston received 21% of its proportional share of competitive grant awards.

Local road miles **86.3** 131st of 351 · 7.4 per 1,000 residents (146th of 351)	Town-owned bridges, replacement cost **$3.7M** scored exposure $883,000 · none in poor condition	Road-stream crossings **168** 30th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **16.8 sq mi** 5% state-owned	Seasonal homes **2%** share of housing units	Peak service population **11,821** residents plus seasonal	Core infrastructure index **0.44** roads, culverts, dams, coast, flood, energy

Burden index 0.21; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$85,131** FY2017–2025 · 11th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 5.0% of Weston's general-fund spending in FY2025, down from 6.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **6.5%** $4M of $61.6M · median town 14.1%	FY2016 **5.2%** $4.1M of $79.4M · median town 12.2%	FY2025 **5.0%** $5.2M of $102M · median town 11.5%	Net of state charges, FY2025 **4.7%** FY2010: 6.3% · median town 10.0%

Weston's state aid did not keep pace with either price measure: FY2025 aid was 17.1% below its FY2006 aid grown by Boston-area consumer prices and 26.3% below grown by the government price index.

Gross state aid went from $4 million in FY2006 to $5.2 million in FY2025, +28.5% in dollars. Flag: in FY2010, $1.5 million of Weston's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+22.3%** $9.7M to $11.9M · all towns +54.0%	All fixed costs, FY2016–25 **+36.4%** $15.4M to $21M · all towns +53.0%	Years squeezed **3 of 9** fixed costs grew faster than allowed levy growth	Health insurance **2 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Weston's health insurance would have been $12.1 million in FY2025; it was $11.9 million, $251,000 below the path. Its fixed costs would have been $19.3 million in FY2025; it was $21 million, $1.77 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Weston came to $890,000, 41.1% of the $2.17 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$890,000	41.1%	28.2%
Placed in the town	$890,000	41.1%	42.3%
Everything placed	$890,000	41.1%	45.2%

SCHOOLS

Weston's required school contribution is 2.4% of median household income, 261st highest of 351.

Chapter 70 aid, FY2026 **$5M** to the town's district	Required local contribution **$22.7M** FY2026
Share of household income **2.4%** 261st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+19%** after inflation

Weston runs its own school district.

EXPECTED AND ACTUAL

Weston received $2.3 million in earmarks placed in the town and competitive grants over ten years, 43% of the $5.3 million its size, need and institutions predict.

PEERS

Weston ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Weston this town	**35**	**$8,400**	**$37.49**	**$87.66**	**0.21**	**2.4%**
Concord peer	34	$8,067	$148	$71.06	0.61	2.5%
Nantucket peer	25	$5,145	$383	$17.26	0.81	3.0%
Cohasset peer	33	$7,092	$383	$129	0.76	2.5%
Dover peer	37	$8,305	$138	$99.67	1.08	2.4%
Norwell peer	35	$7,878	$687	$57.61	1.24	3.4%
Lincoln best in class of 30	41	$8,832	$272	$223	1.39	1.9%
Carlisle lowest in class of 30	35	$7,968	$280	$4.77	0.70	2.1%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BRISTOL COUNTY

Westport

Town · Bristol County · 16,484 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
8th Bristol · Steven J. Ouellette

STATE SENATE
First Bristol and Plymouth · Michael J. Rodrigues

SCHOOL DISTRICTS
Westport Public Schools, the town's own district
Greater Fall River Regional Vocational Technical School District, vocational, shared with Fall River, Somerset and Swansea

REGIONAL PLANNING AGENCY
Southeast Regional Planning and Economic Development District

FAIRNESS INDEX

Westport scores 30 on the Fairness Index for all state aid and 17 for discretionary money. Fifty is a fair share.

ALL STATE AID

30 / 100

312th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	30	32	29

Rank under other weightings: 283rd to 330th.

Stable low: below 45 under every weighting

Westport received less than its share of state aid on all four measures; its blended score of 29 stays between 29 and 30 under every weighting tested.

DISCRETIONARY MONEY ONLY

17 / 100

327th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
18	19	12	19

Rank under other weightings: 318th to 334th.

Stable low: below 45 under every weighting

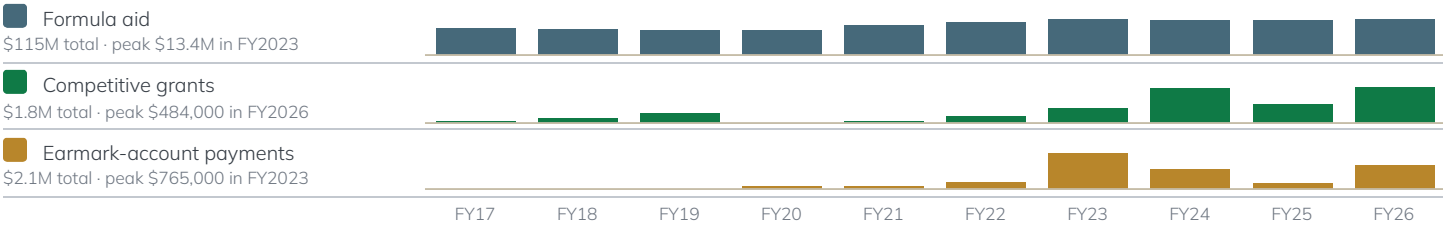
Westport received less than its share of discretionary money on all four measures; its blended score of 17 stays between 16 and 18 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westport's town government and school districts received $115 million in formula aid and $1.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$115M	$1.8M	$2.1M
$6,951 per resident (292nd of 351) · gross	$107 per resident (320th of 351)	$129 per resident (16th of 351)

Competitive grants to Westport peaked in FY2026 at $484,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $18.6 million, are not shown.

EARMARKS

Westport received $860,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$860,000	$860,000	$860,000	Not a member
$52.17 per resident (142nd of 351)	$52.17 per resident (164th of 351)	$52.17 per resident (169th of 351)	35 municipalities had none

Placed in the town: 15 clauses in eight of ten budgets; the most recent in FY2026. Every one names Westport directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$100,000	"as a grant to the town of Westport for information technology infrastructure improvements and upgrades"	Enacted names the town
FY2024	$100,000	"Macomber school in Westport"	Enacted names the town
FY2025	$75,000	"the town of Westport for improvements to the town's transfer station"	Enacted names the town
FY2023	$75,000	"the Westport Police Department for the purchase, installation and training of an emergency vehicle preemption system"	Enacted names the town
FY2023	$75,000	"safety improvements and upgrades at the intersection of state highway route 177, Robert street and Tickle road in the town of Westport"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Westport received 45% of its proportional share of competitive grant awards.

Local road miles **139.4** 41st of 351 · 8.5 per 1,000 residents (129th of 351)	Town-owned bridges, replacement cost **$21.3M** scored exposure $5.4M · two in poor condition	Road-stream crossings **144** 49th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **49.8 sq mi** 2% state-owned	Seasonal homes **7%** share of housing units	Peak service population **17,899** residents plus seasonal	Core infrastructure index **0.26** roads, culverts, dams, coast, flood, energy

Burden index 0.45; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **485 acres** 1.5% of land area · FY2026	State-owned land PILOT, FY2026 **$1.2M** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,478** statewide $117 · FY2026	New growth per resident **$38,287** FY2017–2025 · 64th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 16.5% of Westport's general-fund spending in FY2025, down from 22.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **22.1%** $5.8M of $26.1M · median town 14.1%	FY2016 **18.8%** $6.6M of $35.4M · median town 12.2%	FY2025 **16.5%** $8.8M of $53.2M · median town 11.5%	Net of state charges, FY2025 **13.7%** FY2010: 18.7% · median town 10.0%

Westport's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $816,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westport's state aid did not keep pace with either price measure: FY2025 aid was 1.9% below its FY2006 aid grown by Boston-area consumer prices and 12.8% below grown by the government price index.

Gross state aid went from $5.8 million in FY2006 to $8.8 million in FY2025, +52.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+27.2%** $2.7M to $3.4M · all towns +54.0%	All fixed costs, FY2016–25 **+47.6%** $5.3M to $7.8M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westport's health insurance would have been $3.31 million in FY2025; it was $3.37 million, $60,000 above the path. Its fixed costs would have been $6.63 million in FY2025; it was $7.83 million, $1.21 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westport came to $770,000, 106.9% of the $721,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$770,000	106.9%	28.2%
Placed in the town	$770,000	106.9%	42.3%
Everything placed	$770,000	106.9%	45.2%

SCHOOLS

Westport's required school contribution is 3.2% of median household income, 35th highest of 351.

Chapter 70 aid, FY2026 **$6.5M** to the town's district	Required local contribution **$20.3M** FY2026
Share of household income **3.2%** 35th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Westport runs its own school district and also belongs to Greater Fall River and Bristol County; Westport accounts for 7% and 5% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Westport received $3.3 million in earmarks placed in the town and competitive grants over ten years, 28% of the $11.6 million its size, need and institutions predict.

PEERS

Westport ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westport this town	**30**	**$6,951**	**$107**	**$52.17**	**0.45**	**3.2%**
Dennis peer	25	$4,788	$436	$12.61	0.90	2.4%
Bourne peer	30	$6,777	$185	$55.96	0.51	2.9%
Marshfield peer	38	$9,344	$361	$162	1.35	3.2%
Saugus peer	29	$7,158	$98.00	$42.11	0.36	3.3%
Salisbury peer	38	$7,912	$1,047	$37.77	1.32	2.7%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Tisbury lowest in class of 30	27	$6,847	$443	$0	1.19	5.5%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Westwood

Town · Norfolk County · 16,318 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
11th Norfolk · Paul McMurtry

STATE SENATE
Norfolk and Suffolk · Michael F. Rush

SCHOOL DISTRICTS
Westwood Public Schools, the town's own district
Blue Hills Regional Vocational Technical School District, vocational, shared with Avon, Braintree, Canton, Dedham, Holbrook, Milton, Norwood and Randolph

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Westwood scores 27 on the Fairness Index for all state aid and 21 for discretionary money. Fifty is a fair share.

ALL STATE AID

27 / 100

339th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	43	19	19

Rank under other weightings: 309th to 348th.

Stable low: below 45 under every weighting

Westwood received less than its share of state aid on all four measures; its blended score of 27 stays between 22 and 31 under every weighting tested.

DISCRETIONARY MONEY ONLY

21 / 100

308th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	34	16	14

Rank under other weightings: 300th to 321st.

Stable low: below 45 under every weighting

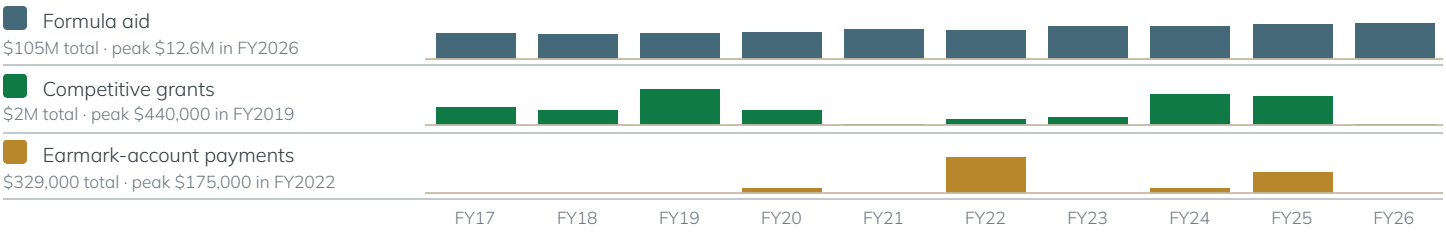
Westwood received less than its share of discretionary money on all four measures; its blended score of 21 stays between 18 and 24 under every weighting tested.

STATE MONEY, FY2017–FY2026

Westwood's town government and school districts received $105 million in formula aid and $2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$105M	**$2M**	**$329,000**
$6,423 per resident (323rd of 351) · gross	$120 per resident (313th of 351)	$20.19 per resident (203rd of 351)

Competitive grants to Westwood peaked in FY2019 at $440,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $13.1 million, are not shown.

EARMARKS

Westwood received $750,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$750,000	**$750,000**	**$750,000**	**Not a member**
$45.96 per resident (159th of 351)	$45.96 per resident (182nd of 351)	$45.96 per resident (184th of 351)	35 municipalities had none

Placed in the town: nine clauses in seven of ten budgets; the most recent in FY2026. Every one names Westwood directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$200,000	"capital improvements to municipally-owned buildings in the town of Westwood"	Enacted names the town
FY2025	$100,000	"design funds for the fire department project in the town of Westwood"	Enacted names the town
FY2022	$100,000	"Family Pantry of Cape Cod Corp."	Enacted names the town
FY2017	$100,000	"complete the 1812 Obed House Restoration Project in the town of Westwood"	Enacted names the town
FY2022	$75,000	"electronic voting equipment in the town of Westwood"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Westwood received 30% of its proportional share of competitive grant awards.

Local road miles **82.0** 149th of 351 · 5.0 per 1,000 residents (229th of 351)	Town-owned bridges, replacement cost **$2.7M** scored exposure $606,000 · none in poor condition	Road-stream crossings **52** 254th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **10.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **16,338** residents plus seasonal	Core infrastructure index **1.97** roads, culverts, dams, coast, flood, energy

Burden index 0.30; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$38,972** FY2017–2025 · 59th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.3% of Westwood's general-fund spending in FY2025, down from 13.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.3%** $7M of $52.7M · median town 14.1%	FY2016 **8.9%** $7M of $78.4M · median town 12.2%	FY2025 **7.3%** $8.3M of $114M · median town 11.5%	Net of state charges, FY2025 **6.6%** FY2010: 10.8% · median town 10.0%

Westwood's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $56,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Westwood's state aid did not keep pace with either price measure: FY2025 aid was 23.4% below its FY2006 aid grown by Boston-area consumer prices and 31.9% below grown by the government price index.

Gross state aid went from $7 million in FY2006 to $8.3 million in FY2025, +18.9% in dollars. Flag: in FY2010, $3 million of Westwood's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+69.2%** $5.5M to $9.2M · all towns +54.0%	All fixed costs, FY2016–25 **+95.4%** $8.9M to $17.3M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Westwood's health insurance would have been $6.81 million in FY2025; it was $9.22 million, $2.42 million above the path. Its fixed costs would have been $11.1 million in FY2025; it was $17.3 million, $6.26 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Westwood came to $700,000, 18.6% of the $3.77 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$700,000	18.6%	28.2%
Placed in the town	$700,000	18.6%	42.3%
Everything placed	$700,000	18.6%	45.2%

SCHOOLS

Westwood's required school contribution is 2.5% of median household income, 231st highest of 351.

Chapter 70 aid, FY2026 **$7.8M** to the town's district	Required local contribution **$31M** FY2026
Share of household income **2.5%** 231st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+25%** after inflation

Westwood runs its own school district and also belongs to Norfolk County and Blue Hills; Westwood accounts for 2% and 0% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Westwood received $3.9 million in earmarks placed in the town and competitive grants over ten years, about the $3.8 million its size, need and institutions predict.

PEERS

Westwood ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Westwood this town	**27**	**$6,423**	**$120**	**$45.96**	**0.30**	**2.5%**
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Winchester peer	28	$6,820	$40.16	$49.13	0.45	2.5%
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Nantucket peer · lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Weymouth

City · Norfolk County · 58,505 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

4th Norfolk · James M. Murphy 74% of residents
3rd Norfolk · Ronald Mariano 26% of residents

Weymouth is split among two House districts. Shares are of 2020 residents.

STATE SENATE

First Plymouth and Norfolk · Patrick M. O'Connor

SCHOOL DISTRICTS

Weymouth Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Weymouth scores 39 on the Fairness Index for all state aid and 62 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

219th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
36	35	44	43

Rank under other weightings: 187th to 265th.

Stable low: below 45 under every weighting

Weymouth received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

62 / 100

132nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
59	57	66	65

Rank under other weightings: 122nd to 147th.

Stable high: above 55 under every weighting

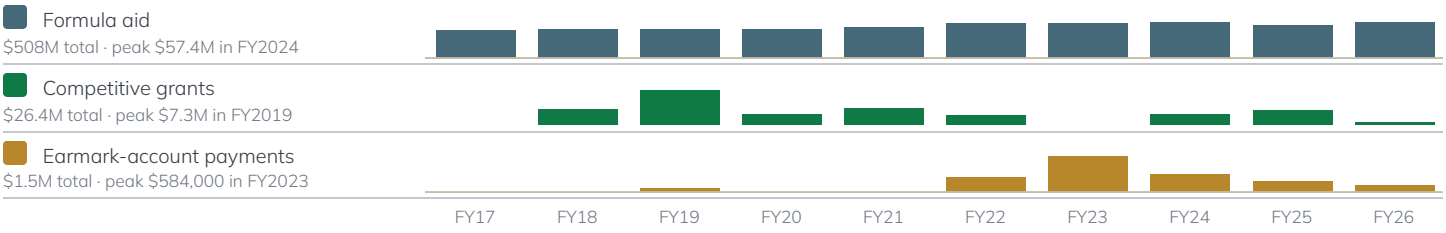
Weymouth received more than its share of discretionary money on all four measures; its blended score of 62 stays between 60 and 64 under every weighting tested.

STATE MONEY, FY2017–FY2026

Weymouth's town government and school districts received $508 million in formula aid and $26.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$508M	$26.4M	$1.5M
$8,687 per resident (230th of 351) · gross	$450 per resident (152nd of 351)	$25.64 per resident (171st of 351)

Competitive grants to Weymouth peaked in FY2019 at $7.3 million, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $24.9 million, are not shown.

EARMARKS

Weymouth received $5 million in local earmarks naming the town, $6.1 million placed in the town and $6.1 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$5M	$6.1M	$6.1M	Not a member
$85.63 per resident (65th of 351)	$104 per resident (64th of 351)	$104 per resident (73rd of 351)	35 municipalities had none

Placed in the town: 74 clauses in ten of ten budgets; the most recent in FY2026. $5 million came in clauses that name Weymouth; the other $1.1 million went to organizations based in Weymouth, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$500,000	"South Shore Health to support its efforts to advance health equity and improve access for underserved communities"	Enacted recipient based here
FY2024	$500,000	"South Shore Health to support its efforts to advance health equity and improve access for underserved communities"	Enacted recipient based here
FY2023	$200,000	"the construction of Fore River trail in the city known as the town of Weymouth"	Enacted names the town
FY2022	$200,000	"the construction of Fore River trail in Weymouth"	Enacted names the town
FY2026	$150,000	"the Weymouth Teen Center for job skills training, technology support, remedial education services and to promote a social service program for growth..."	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Weymouth received 2.15 times its proportional share of competitive grant awards.

Local road miles **151.0** 34th of 351 · 2.6 per 1,000 residents (329th of 351)	Town-owned bridges, replacement cost **$6M** scored exposure $2.7M · two in poor condition	Road-stream crossings **111** 93rd of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **16.8 sq mi** 1% state-owned	Seasonal homes **0%** share of housing units	Peak service population **58,705** residents plus seasonal	Core infrastructure index **2.37** roads, culverts, dams, coast, flood, energy

Burden index 2.15; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **71 acres** 0.7% of land area · FY2026	State-owned land PILOT, FY2026 **$37,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$519** statewide $117 · FY2026	New growth per resident **$22,551** FY2017–2025 · 156th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 19.4% of Weymouth's general-fund spending in FY2025, down from 26.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **26.2%** $30.6M of $117M · median town 14.1%	FY2016 **24.9%** $36.7M of $147M · median town 12.2%	FY2025 **19.4%** $41.9M of $216M · median town 11.5%	Net of state charges, FY2025 **15.9%** FY2010: 23.9% · median town 10.0%

Weymouth's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $111,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Weymouth's state aid did not keep pace with either price measure: FY2025 aid was 11.8% below its FY2006 aid grown by Boston-area consumer prices and 21.6% below grown by the government price index.

Gross state aid went from $30.6 million in FY2006 to $41.9 million in FY2025, +36.8% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.0%** $24.3M to $33.3M · all towns +54.0%	All fixed costs, FY2016–25 **+52.7%** $33.8M to $51.6M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Weymouth's health insurance would have been $30.4 million in FY2025; it was $33.3 million, $2.94 million above the path. Its fixed costs would have been $42.2 million in FY2025; it was $51.6 million, $9.39 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Weymouth came to $4.3 million, 47.3% of the $8.99 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$4.3M	47.3%	28.2%
Placed in the town	$5.4M	59.6%	42.3%
Everything placed	$5.4M	59.6%	45.2%

SCHOOLS

Weymouth's required school contribution is 2.8% of median household income, 128th highest of 351.

Chapter 70 aid, FY2026 **$30.9M** to the town's district	Required local contribution **$74M** FY2026
Share of household income **2.8%** 128th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–10%** after inflation

Weymouth runs its own school district and also belongs to Norfolk County; Weymouth accounts for 9% of that district's foundation budget.

EXPECTED AND ACTUAL

Weymouth received $36.7 million in earmarks placed in the town and competitive grants over ten years, 78% more than the $20.6 million its size, need and institutions predict.

PEERS

Weymouth ranks 4th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Weymouth this town	**39**	**$8,687**	**$450**	**$104**	**2.15**	**2.8%**
Peabody peer	39	$9,164	$124	$37.72	0.34	3.1%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Quincy peer	32	$7,723	$176	$107	0.82	3.0%
Dartmouth peer	29	$6,506	$296	$157	0.73	3.6%
Marshfield best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Yarmouth lowest in class of 30	27	$6,216	$356	$8.62	0.82	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

FRANKLIN COUNTY

Whately

Town · Franklin County · 1,499 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Franklin · Natalie M. Blais

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Whately Public Schools, the town's own district
Frontier Regional School District, shared with Conway, Deerfield and Sunderland
Franklin County Regional Vocational Technical School District, vocational, shared with Bernardston, Buckland, Colrain, Conway, Deerfield, Erving, Gill, Greenfield and ten others

REGIONAL PLANNING AGENCY
Franklin Regional Council Of Governments

FAIRNESS INDEX

Whately scores 45 on the Fairness Index for all state aid and 83 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

158th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
45	50	43	43

Rank under other weightings: 155th to 163rd.

Weighting-dependent: the range crosses the 45–55 band

Whately received less than its share of state aid on all four measures; its blended score of 45 stays between 44 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

83 / 100

64th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
86	88	71	85

Rank under other weightings: 58th to 74th.

Stable high: above 55 under every weighting

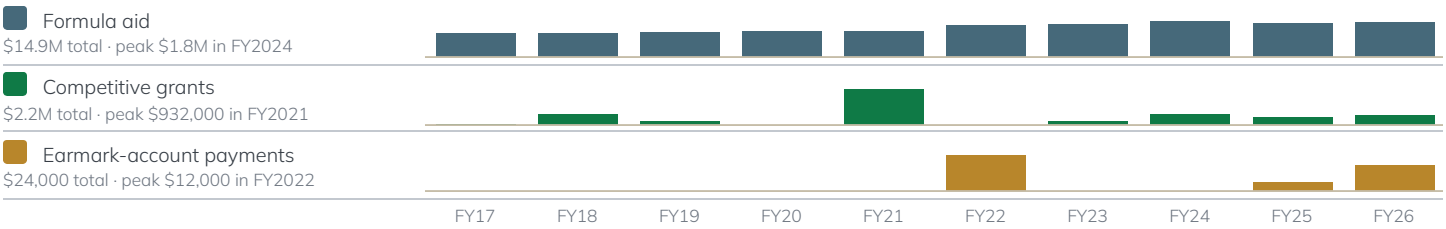
Whately received more than its share of discretionary money on all four measures; its blended score of 83 stays between 80 and 85 under every weighting tested.

STATE MONEY, FY2017–FY2026

Whately's town government and school districts received $14.9 million in formula aid and $2.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$14.9M	**$2.2M**	**$24,000**
$9,968 per resident (178th of 351) · gross	$1,484 per resident (56th of 351)	$15.89 per resident (228th of 351)

Competitive grants to Whately peaked in FY2021 at $932,000, 42% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $2.1 million, are not shown.

EARMARKS

Whately received $43,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$43,000	**$43,000**	**$43,000**	**Not a member**
$28.91 per resident (233rd of 351)	$28.91 per resident (245th of 351)	$28.91 per resident (245th of 351)	35 municipalities had none

Placed in the town: two clauses in two of ten budgets; the most recent in FY2023. Every one names Whately directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$33,000 (split three ways)	"the town of Deerfield for improvements to the regional senior center in the town that serves the towns of Deerfield, Sunderland and Whately"	Enacted names the town
FY2022	$10,000	"the town of Whately's two hundred and fiftieth anniversary"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Whately received about its proportional share of competitive grant awards.

Local road miles **31.5** 322nd of 351 · 21.0 per 1,000 residents (54th of 351)	Town-owned bridges, replacement cost **$19.7M** scored exposure $4.3M · one in poor condition	Road-stream crossings **48** 270th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **20.2 sq mi** 12% state-owned	Seasonal homes **0%** share of housing units	Peak service population **1,499** residents plus seasonal	Core infrastructure index **2.09** roads, culverts, dams, coast, flood, energy

Burden index 1.02; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,302 acres** 10.1% of land area · FY2026	State-owned land PILOT, FY2026 **$62,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$47.87** statewide $117 · FY2026	New growth per resident **$33,809** FY2017–2025 · 87th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.8% of Whately's general-fund spending in FY2025, down from 13.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.1%** $542,000 of $4.1M · median town 14.1%	FY2016 **13.5%** $673,000 of $5M · median town 12.2%	FY2025 **11.8%** $788,000 of $6.7M · median town 11.5%	Net of state charges, FY2025 **10.7%** FY2010: 12.8% · median town 10.0%

Whately's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $464,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Whately's state aid did not keep pace with either price measure: FY2025 aid was 6.2% below its FY2006 aid grown by Boston-area consumer prices and 16.6% below grown by the government price index.

Gross state aid went from $542,000 in FY2006 to $788,000 in FY2025, +45.5% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+37.9%** $307,000 to $423,000 · all towns +54.0%	All fixed costs, FY2016–25 **+48.1%** $513,000 to $759,000 · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Whately's health insurance would have been $383,000 in FY2025; it was $423,000, $40,000 above the path. Its fixed costs would have been $640,000 in FY2025; it was $759,000, $119,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Whately came to $43,000, 37.3% of the $116,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$43,000	37.3%	28.2%
Placed in the town	$43,000	37.3%	42.3%
Everything placed	$43,000	37.3%	45.2%

SCHOOLS

Whately's required school contribution is 2.4% of

EXPECTED AND ACTUAL

Whately received $2.4 million in earmarks placed in the town and competitive grants over ten years, 78%

median household income, 252nd highest of 351.

Chapter 70 aid, FY2026 **$781,000** to the town's district	Required local contribution **$1.8M** FY2026
Share of household income **2.4%** 252nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–8%** after inflation

Whately runs its own district for some grades and belongs to Frontier and Franklin County for others; Whately accounts for 11% and 2% of their foundation budgets, in that order.

of the $3.1 million its size, need and institutions predict.

PEERS

Whately ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Whately this town	**45**	**$9,968**	**$1,484**	**$28.91**	**1.02**	**2.4%**
Hinsdale peer · lowest in class of 30	44	$9,786	$1,790	$0	2.54	3.6%
Sandisfield peer	43	$9,713	$2,087	$0	0.34	3.1%
Essex peer	32	$7,261	$477	$208	0.75	2.6%
Berlin peer	32	$7,567	$464	$89.70	2.37	2.7%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Princeton best in class of 30	39	$8,727	$417	$299	0.96	2.3%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

PLYMOUTH COUNTY

Whitman

Town · Plymouth County · 15,295 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

7th Plymouth · Alyson M. Sullivan-Almeida

STATE SENATE

Second Plymouth and Norfolk · Michael D. Brady

SCHOOL DISTRICTS

Whitman-Hanson Regional School District, shared with Hanson
South Shore Regional Vocational Technical School District, vocational, shared with Abington, Cohasset, Hanover, Hanson, Marshfield, Norwell, Rockland and Scituate

REGIONAL PLANNING AGENCY

Old Colony Planning Council

FAIRNESS INDEX

Whitman scores 56 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

56 / 100

74th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
58	56	55	55

Rank under other weightings: 65th to 83rd.

Stable high: above 55 under every weighting

Whitman received more than its share of state aid on all four measures; its blended score of 56 stays between 55 and 57 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100

278th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	24	35	23

Rank under other weightings: 267th to 293rd.

Stable low: below 45 under every weighting

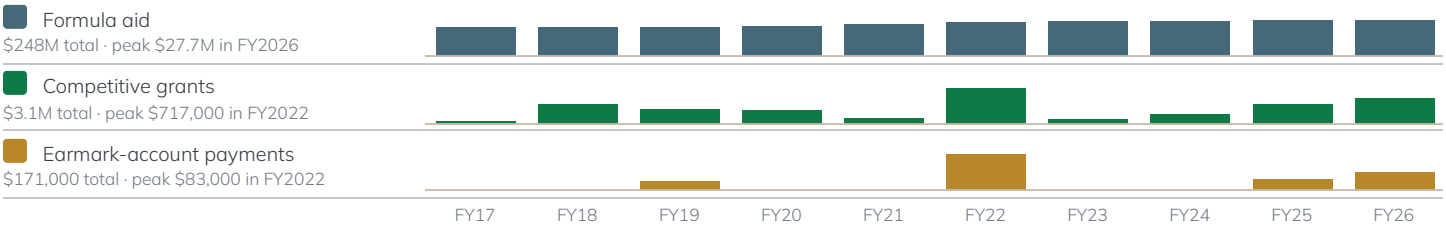
Whitman received less than its share of discretionary money on all four measures; its blended score of 27 stays between 25 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Whitman's town government and school districts received $248 million in formula aid and $3.1 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$248M	$3.1M	$171,000
$16,230 per resident (56th of 351) · gross	$202 per resident (250th of 351)	$11.17 per resident (252nd of 351)

Competitive grants to Whitman peaked in FY2022 at $717,000, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8.7 million, are not shown.

EARMARKS

Whitman received $235,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$235,000	$235,000	$235,000	Not a member
$15.36 per resident (281st of 351)	$15.36 per resident (289th of 351)	$15.36 per resident (290th of 351)	35 municipalities had none

Placed in the town: eight clauses in six of ten budgets; the most recent in FY2026. Every one names Whitman directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$50,000	"install a well and irrigation system for the town park's upper field in the town of Whitman"	Enacted names the town
FY2022	$50,000	"technology improvements at the Whitman-Hanson regional school district"	Enacted names the town
FY2019	$35,000	"technology upgrades in the Whitman-Hanson Regional School District"	Enacted names the town
FY2026	$30,000	"improvements for the council on aging in the town of Whitman"	Enacted names the town
FY2024	$25,000	"improvements to the Whitman fire department"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Whitman received 52% of its proportional share of competitive grant awards.

Local road miles **53.9** 237th of 351 · 3.5 per 1,000 residents (298th of 351)	Town-owned bridges, replacement cost **$1.5M** scored exposure $466,000 · none in poor condition	Road-stream crossings **38** 300th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **6.9 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **15,295** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.52; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$14,778** FY2017–2025 · 256th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 7.2% of Whitman's general-fund spending in FY2025, down from 11.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **11.5%** $2.5M of $21.5M · median town 14.1%	FY2016 **8.7%** $2.6M of $29.6M · median town 12.2%	FY2025 **7.2%** $3.4M of $46.4M · median town 11.5%	Net of state charges, FY2025 **6.7%** FY2010: 9.6% · median town 10.0%

Whitman's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $19.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Whitman's state aid did not keep pace with either price measure: FY2025 aid was 12.2% below its FY2006 aid grown by Boston-area consumer prices and 22.0% below grown by the government price index.

Gross state aid went from $2.5 million in FY2006 to $3.4 million in FY2025, +36.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+63.6%** $1.1M to $1.8M · all towns +54.0%	All fixed costs, FY2016–25 **+73.0%** $3.2M to $5.6M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Whitman's health insurance would have been $1.36 million in FY2025; it was $1.79 million, $424,000 above the path. Its fixed costs would have been $4.01 million in FY2025; it was $5.56 million, $1.55 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Whitman came to $205,000, 29.5% of the $696,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$205,000	29.5%	28.2%
Placed in the town	$205,000	29.5%	42.3%
Everything placed	$205,000	29.5%	45.2%

SCHOOLS

Whitman's required school contribution is 2.5% of median household income, 212th highest of 351.

Chapter 70 aid, FY2026 **$19.8M** attributed to the town	Required local contribution **$15.9M** FY2026
Share of household income **2.5%** 212th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Whitman has no school district of its own. Its pupils attend Whitman, Whitman-Hanson and South Shore; Whitman accounts for 100%, 61% and 22% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Whitman received $3.6 million in earmarks placed in the town and competitive grants over ten years, 44% of the $8.2 million its size, need and institutions predict.

PEERS

Whitman ranks 9th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Whitman this town	**56**	**$16,230**	**$202**	**$15.36**	**0.52**	**2.5%**
Northbridge peer	56	$14,554	$230	$124	0.74	2.4%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Carver peer · lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%
Holbrook peer · best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Acushnet peer	43	$10,949	$130	$21.65	0.60	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPDEN COUNTY

Wilbraham

Town · Hampden County · 14,572 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
12th Hampden · Angelo J. Puppolo, Jr.	**Hampden, Hampshire and Worcester** · Jacob R. Oliveira	**Hampden-Wilbraham Regional School District**, shared with Hampden	Pioneer Valley Planning Commission

FAIRNESS INDEX

Wilbraham scores 44 on the Fairness Index for all state aid and 27 for discretionary money. Fifty is a fair share.

ALL STATE AID

44 / 100

170th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
47	50	42	37

Rank under other weightings: 155th to 191st.

Weighting-dependent: the range crosses the 45–55 band

Wilbraham received less than its share of state aid on all four measures; its blended score of 44 stays between 41 and 47 under every weighting tested.

DISCRETIONARY MONEY ONLY

27 / 100

275th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	30	30	20

Rank under other weightings: 270th to 286th.

Stable low: below 45 under every weighting

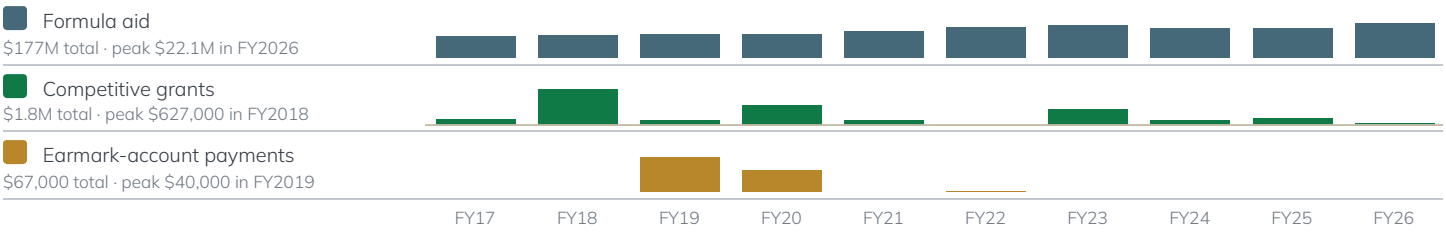
Wilbraham received less than its share of discretionary money on all four measures; its blended score of 27 stays between 25 and 29 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wilbraham's town government and school districts received $177 million in formula aid and $1.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$177M	**$1.8M**	**$67,000**
$12,134 per resident (126th of 351) · gross	$123 per resident (308th of 351)	$4.62 per resident (292nd of 351)

Competitive grants to Wilbraham peaked in FY2018 at $627,000, 35% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $5.1 million, are not shown.

EARMARKS

Wilbraham received $1.6 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.6M	**$1.6M**	**$1.6M**	**Not a member**
$109 per resident (36th of 351)	$109 per resident (58th of 351)	$109 per resident (64th of 351)	35 municipalities had none

Placed in the town: 25 clauses in ten of ten budgets; the most recent in FY2026. Every one names Wilbraham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$125,000	"Rick's Place, Inc. in the town of Wilbraham to provide grief support to youth and their families in the pioneer valley"	Enacted names the town
FY2025	$125,000	"Rick's Place, Inc. of Wilbraham to provide grief support to youth and their families in the Pioneer valley"	Enacted names the town
FY2024	$110,000	"Rick's Place, Inc. of Wilbraham to provide grief support to youth and their families in the Pioneer Valley"	Enacted names the town
FY2026	$100,000	"the Wilbraham Nature and Cultural Council for tourism, marketing and advertising purposes"	Enacted names the town
FY2025	$100,000	"the Wilbraham nature and cultural council for tourism, marketing and advertising purposes"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wilbraham received 42% of its proportional share of competitive grant awards.

Local road miles **103.5** 83rd of 351 · 7.1 per 1,000 residents (155th of 351)	Town-owned bridges, replacement cost **$17.1M** scored exposure $5.6M · none in poor condition	Road-stream crossings **98** 120th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **22.0 sq mi** 0% state-owned	Seasonal homes **1%** share of housing units	Peak service population **14,680** residents plus seasonal	Core infrastructure index **0.69** roads, culverts, dams, coast, flood, energy

Burden index 0.42; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **56 acres** 0.4% of land area · FY2026	State-owned land PILOT, FY2026 **$4,362** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$77.89** statewide $117 · FY2026	New growth per resident **$14,302** FY2017–2025 · 262nd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 3.9% of Wilbraham's general-fund spending in FY2025, down from 5.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **5.1%** $1.4M of $27.9M · median town 14.1%	FY2016 **4.0%** $1.5M of $37.5M · median town 12.2%	FY2025 **3.9%** $2M of $51.2M · median town 11.5%	Net of state charges, FY2025 **3.7%** FY2010: 3.9% · median town 10.0%

Wilbraham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $11.2 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wilbraham's state aid did not keep pace with either price measure: FY2025 aid was 9.5% below its FY2006 aid grown by Boston-area consumer prices and 19.6% below grown by the government price index.

Gross state aid went from $1.4 million in FY2006 to $2 million in FY2025, +40.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+63.3%** $1.1M to $1.8M · all towns +54.0%	All fixed costs, FY2016–25 **+84.0%** $3M to $5.6M · all towns +53.0%	Years squeezed **9 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wilbraham's health insurance would have been $1.34 million in FY2025; it was $1.76 million, $413,000 above the path. Its fixed costs would have been $3.78 million in FY2025; it was $5.57 million, $1.79 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wilbraham came to $1.4 million, 2.0 times the $681,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.4M	2.0 times	28.2%
Placed in the town	$1.4M	2.0 times	42.3%
Everything placed	$1.4M	2.0 times	45.2%

SCHOOLS

Wilbraham's required school contribution is 3.1% of median household income, 58th highest of 351.

Chapter 70 aid, FY2026 **$11.4M** attributed to the town	Required local contribution **$19.8M** FY2026
Share of household income **3.1%** 58th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–6%** after inflation

Wilbraham has no school district of its own. Its pupils attend Hampden-Wilbraham; Wilbraham accounts for 80% of that district's foundation budget. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Wilbraham received $3.5 million in earmarks placed in the town and competitive grants over ten years, 65% of the $5.4 million its size, need and institutions predict.

PEERS

Wilbraham ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wilbraham this town	**44**	**$12,134**	**$123**	**$109**	**0.42**	**3.1%**
Millbury peer	44	$9,909	$648	$53.29	1.09	2.5%
Tyngsborough peer	42	$10,115	$758	$44.22	2.20	3.2%
Bellingham peer	39	$9,082	$546	$24.67	1.24	3.0%
Grafton peer	36	$9,020	$459	$36.42	1.97	2.9%
Abington peer	42	$10,596	$233	$38.85	1.02	2.5%
Westminster best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
East Longmeadow lowest in class of 30	42	$11,619	$224	$13.70	0.72	3.2%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Williamsburg

Town · Hampshire County · 2,694 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Hampshire · Lindsay N. Sabadosa

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Williamsburg Public Schools, the town's own district

Hampshire Regional School District, shared with Chesterfield, Goshen, Southampton and Westhampton

REGIONAL PLANNING AGENCY

Pioneer Valley Planning Commission

FAIRNESS INDEX

Williamsburg scores 41 on the Fairness Index for all state aid and 54 for discretionary money. Fifty is a fair share.

ALL STATE AID

41 / 100

200th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
40	44	46	35

Rank under other weightings: 181st to 223rd.

Stable low: below 45 under every weighting

Williamsburg received less than its share of state aid on all four measures; its blended score of 41 stays between 39 and 44 under every weighting tested.

DISCRETIONARY MONEY ONLY

54 / 100

165th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
61	65	36	55

Rank under other weightings: 147th to 188th.

Weighting-dependent: the range crosses the 45–55 band

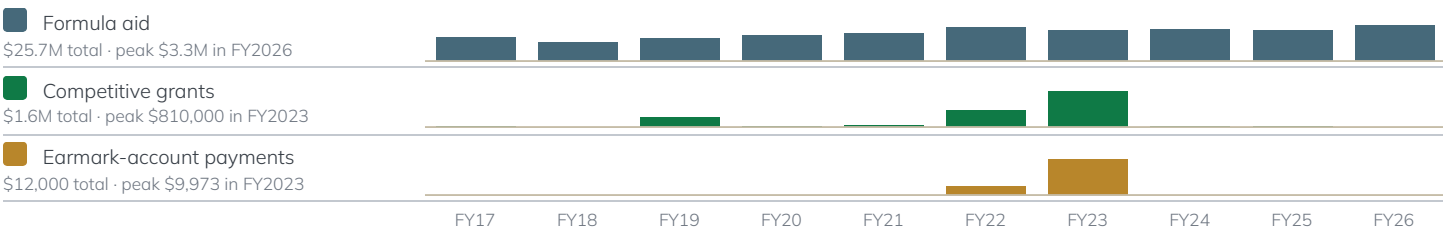
Williamsburg received more than its share of discretionary money on three of four measures; its blended score of 54 stays between 49 and 59 under every weighting tested.

STATE MONEY, FY2017–FY2026

Williamsburg's town government and school districts received $25.7 million in formula aid and $1.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$25.7M	**$1.6M**	**$12,000**
$9,541 per resident (192nd of 351) · gross	$578 per resident (126th of 351)	$4.62 per resident (291st of 351)

Competitive grants to Williamsburg peaked in FY2023 at $810,000, 52% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $4.8 million, are not shown.

EARMARKS

Williamsburg received $10,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$10,000	**$10,000**	**$10,000**	**Not a member**
$3.71 per resident (308th of 351)	$3.71 per resident (314th of 351)	$3.71 per resident (314th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2022. Every one names Williamsburg directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$10,000	"the town of Williamsburg for the celebration of the town's two hundred and fiftieth anniversary"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Williamsburg received 1.40 times its proportional share of competitive grant awards.

Local road miles **42.5** 279th of 351 · 15.8 per 1,000 residents (71st of 351)	Town-owned bridges, replacement cost **$15.8M** scored exposure $6.8M · one in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **25.5 sq mi** 3% state-owned	Seasonal homes **1%** share of housing units	Peak service population **2,709** residents plus seasonal	Core infrastructure index **3.29** roads, culverts, dams, coast, flood, energy

Burden index 1.40; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **463 acres** 2.8% of land area · FY2026	State-owned land PILOT, FY2026 **$14,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$30.87** statewide $117 · FY2026	New growth per resident **$15,202** FY2017–2025 · 251st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 14.3% of Williamsburg's general-fund spending in FY2025, down from 20.7% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **20.7%** $1M of $5M · median town 14.1%	FY2016 **14.5%** $996,000 of $6.9M · median town 12.2%	FY2025 **14.3%** $1.4M of $9.7M · median town 11.5%	Net of state charges, FY2025 **12.0%** FY2010: 12.6% · median town 10.0%

Williamsburg's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $742,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Williamsburg's state aid did not keep pace with either price measure: FY2025 aid was 13.1% below its FY2006 aid grown by Boston-area consumer prices and 22.8% below grown by the government price index.

Gross state aid went from $1 million in FY2006 to $1.4 million in FY2025, +34.7% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.8%** $438,000 to $652,000 · all towns +54.0%	All fixed costs, FY2016–25 **+59.5%** $783,000 to $1.2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Williamsburg's health insurance would have been $547,000 in FY2025; it was $652,000, $105,000 above the path. Its fixed costs would have been $977,000 in FY2025; it was $1.25 million, $271,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Williamsburg came to $10,000, 4.7% of the $214,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$10,000	4.7%	28.2%
Placed in the town	$10,000	4.7%	42.3%
Everything placed	$10,000	4.7%	45.2%

SCHOOLS

Williamsburg's required school contribution is 2.2% of median household income, 289th highest of 351.

Chapter 70 aid, FY2026 **$1.6M** to the town's district	Required local contribution **$2.5M** FY2026
Share of household income **2.2%** 289th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+46%** after inflation

EXPECTED AND ACTUAL

Williamsburg received $1.6 million in earmarks placed in the town and competitive grants over ten years, 62% of the $2.6 million its size, need and institutions predict.

Williamsburg runs its own district for some grades and belongs to Hampshire for others; Williamsburg accounts for 20% of that district's foundation budget.

PEERS

Williamsburg ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Williamsburg this town	**41**	**$9,541**	**$578**	**$3.71**	**1.40**	**2.2%**
Brimfield peer	50	$12,874	$303	$64.78	0.46	2.7%
Conway peer · lowest in class of 30	48	$12,799	$405	$0	0.68	2.5%
Millville peer	56	$14,661	$545	$114	1.93	2.0%
Hampden peer	31	$7,912	$119	$42.46	1.10	3.0%
Shutesbury peer	62	$14,882	$4,462	$0	0.50	2.0%
Halifax best in class of 30	48	$12,543	$155	$155	0.34	2.6%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Williamstown

Town · Berkshire County · 9,150 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Berkshire · John Barrett, III

STATE SENATE

Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS

Mount Greylock Regional School District, shared with Lanesborough

Northern Berkshire Regional Vocational Technical School District, vocational, shared with Adams, Cheshire, Clarksburg, Florida, Lanesborough, Monroe, North Adams and Savoy

REGIONAL PLANNING AGENCY

Berkshire Regional Planning Commission

FAIRNESS INDEX

Williamstown scores 21 on the Fairness Index for all state aid and 18 for discretionary money. Fifty is a fair share.

ALL STATE AID

21 / 100

349th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
20	16	27	22

Rank under other weightings: 344th to 351st.

Stable low: below 45 under every weighting

Williamstown received less than its share of state aid on all four measures; its blended score of 21 stays between 19 and 23 under every weighting tested.

DISCRETIONARY MONEY ONLY

18 / 100

320th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
19	15	18	21

Rank under other weightings: 312th to 329th.

Stable low: below 45 under every weighting

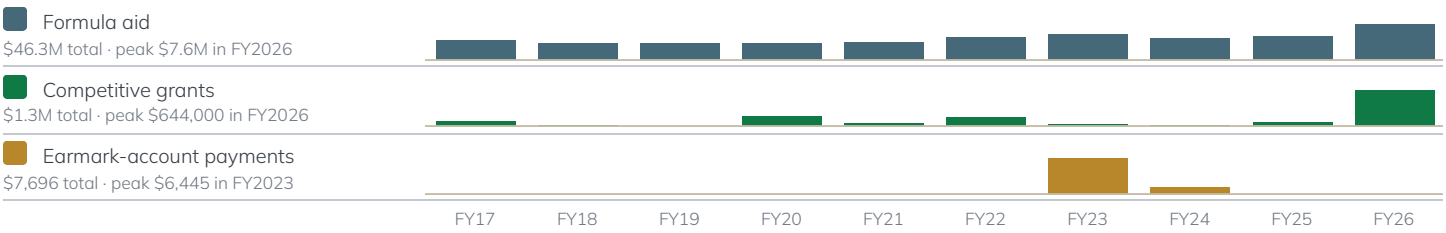
Williamstown received less than its share of discretionary money on all four measures; its blended score of 18 stays between 17 and 19 under every weighting tested.

STATE MONEY, FY2017–FY2026

Williamstown's town government and school districts received $46.3 million in formula aid and $1.3 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$46.3M	**$1.3M**	**$7,696**
$5,059 per resident (344th of 351) · gross	$141 per resident (297th of 351)	$0.84 per resident (328th of 351)

Competitive grants to Williamstown peaked in FY2026 at $644,000, 50% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.7 million, are not shown.

EARMARKS

Williamstown received $188,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$188,000	**$188,000**	**$188,000**	**Not a member**
$20.49 per resident (266th of 351)	$20.49 per resident (276th of 351)	$20.49 per resident (276th of 351)	35 municipalities had none

Placed in the town: four clauses in four of ten budgets; the most recent in FY2025. Every one names Williamstown directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2022	$75,000	"the Williamstown Meetinghouse Preservation Fund, Inc. to support repairs to the Williamstown Meetinghouse in the town of Williamstown"	Enacted names the town
FY2023	$50,000	"the Williamstown Meetinghouse Preservation Fund, Inc. to support repairs to the Williamstown Meetinghouse"	Enacted names the town
FY2017	$50,000	"the Turner House Living Center for Veterans in Williamstown"	Enacted names the town
FY2025	$12,000	"programming at the Williamstown Senior Center"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Williamstown received 1.38 times its proportional share of competitive grant awards.

Local road miles **52.4** 240th of 351 · 5.7 per 1,000 residents (203rd of 351)	Town-owned bridges, replacement cost **$21.9M** scored exposure $4.8M · one in poor condition	Road-stream crossings **121** 75th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **46.7 sq mi** 24% state-owned	Seasonal homes **7%** share of housing units	Peak service population **9,705** residents plus seasonal	Core infrastructure index **0.76** roads, culverts, dams, coast, flood, energy

Burden index 1.38; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **6,826 acres** 22.8% of land area · FY2026	State-owned land PILOT, FY2026 **$260,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$38.14** statewide $117 · FY2026	New growth per resident **$17,518** FY2017–2025 · 220th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

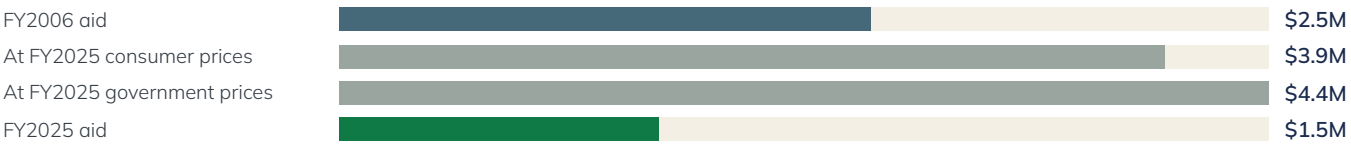
State aid covered 5.7% of Williamstown's general-fund spending in FY2025, down from 16.6% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **16.6%** $2.5M of $15.2M · median town 14.1%	FY2016 **12.6%** $2.3M of $18.4M · median town 12.2%	FY2025 **5.7%** $1.5M of $26.3M · median town 11.5%	Net of state charges, FY2025 **5.6%** FY2010: 12.9% · median town 10.0%

Williamstown's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $2.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Williamstown's state aid did not keep pace with either price measure: FY2025 aid was 61.4% below its FY2006 aid grown by Boston-area consumer prices and 65.6% below grown by the government price index.



Gross state aid went from $2.5 million in FY2006 to $1.5 million in FY2025, −40.1% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **−34.0%** $2M to $1.3M · all towns +54.0%	All fixed costs, FY2016–25 **−8.3%** $3.2M to $2.9M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Williamstown's health insurance would have been $2.46 million in FY2025; it was $1.30 million, $1.16 million below the path. Its fixed costs would have been $3.98 million in FY2025; it was $2.92 million, $1.06 million below the path.

Flag: fixed costs changed by more than 30% in one year in FY2019 (−36%); health insurance changed by more than 30% in one year in FY2019 (−46%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Williamstown's reported health insurance fell from $2 million in FY2016 to $1.3 million in FY2025, so there is no increase to set its earmarks against.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$188,000	no increase	28.2%
Placed in the town	$188,000	no increase	42.3%
Everything placed	$188,000	no increase	45.2%

SCHOOLS

Williamstown's required school contribution is 2.4% of median household income, 265th highest of 351.

Chapter 70 aid, FY2026 **$2.8M** attributed to the town	Required local contribution **$8.1M** FY2026
Share of household income **2.4%** 265th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Williamstown has no school district of its own. Its pupils attend Mount Greylock and Northern Berkshire; Williamstown accounts for 66% and 5% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Williamstown received $2.1 million in earmarks placed in the town and competitive grants over ten years, 62% of the $3.4 million its size, need and institutions predict.

PEERS

Williamstown ranks 8th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Williamstown this town	**21**	**$5,059**	**$141**	**$20.49**	**1.38**	**2.4%**
Blackstone peer	51	$14,382	$190	$90.57	0.82	2.6%
Monson peer	55	$15,493	$338	$14.84	2.33	2.6%
Belchertown peer	49	$13,722	$401	$15.27	2.92	2.5%
Dudley peer	60	$17,447	$442	$36.88	1.55	2.5%
Shirley peer	48	$11,957	$554	$23.80	0.74	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Lanesborough lowest in class of 30	40	$10,886	$484	$0	1.16	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Wilmington

Town · Middlesex County · 23,336 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
19th Middlesex · David Allen Robertson

STATE SENATE
Second Essex and Middlesex · Barry R. Finegold

SCHOOL DISTRICTS
Wilmington Public Schools, the town's own district
Shawsheen Valley Regional Vocational Technical School District, vocational, shared with Bedford, Billerica, Burlington and Tewksbury

REGIONAL PLANNING AGENCY
Metropolitan Area Planning Council

FAIRNESS INDEX

Wilmington scores 42 on the Fairness Index for all state aid and 31 for discretionary money. Fifty is a fair share.

ALL STATE AID

42 / 100

192nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
39	56	38	36

Rank under other weightings: 166th to 216th.

Weighting-dependent: the range crosses the 45–55 band

Wilmington received less than its share of state aid on three of four measures; its blended score of 42 stays between 39 and 45 under every weighting tested.

DISCRETIONARY MONEY ONLY

31 / 100

267th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
28	44	24	26

Rank under other weightings: 254th to 272nd.

Stable low: below 45 under every weighting

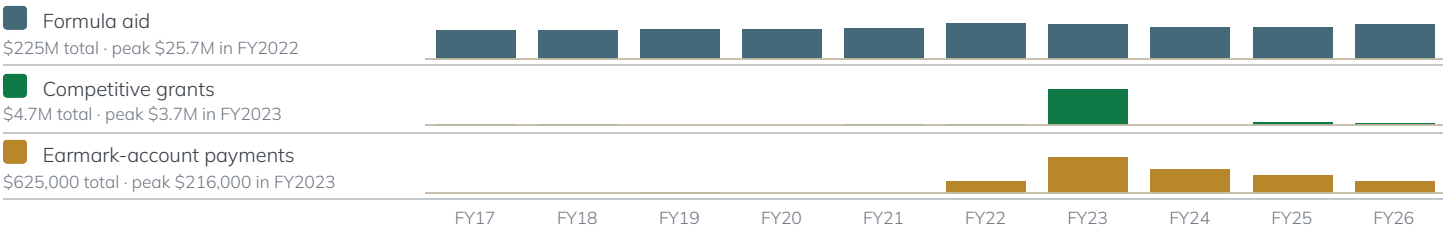
Wilmington received less than its share of discretionary money on all four measures; its blended score of 31 stays between 27 and 34 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wilmington's town government and school districts received $225 million in formula aid and $4.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$225M	**$4.7M**	**$625,000**
$9,651 per resident (190th of 351) · gross	$202 per resident (251st of 351)	$26.76 per resident (163rd of 351)

Competitive grants to Wilmington peaked in FY2023 at $3.7 million, 78% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $9.4 million, are not shown.

EARMARKS

Wilmington received $739,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$739,000	**$739,000**	**$739,000**	**Not a member**
$31.68 per resident (223rd of 351)	$31.68 per resident (234th of 351)	$31.68 per resident (235th of 351)	35 municipalities had none

Placed in the town: 18 clauses in eight of ten budgets; the most recent in FY2026. Every one names Wilmington directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$75,000	"repairs to the public school track and athletic facilities in the town of Wilmington"	Enacted names the town
FY2022	$75,000	"the town of Wilmington to study, survey, engineer and install a traffic control signal at the public safety building for the safe entry and exit of…"	Enacted names the town
FY2026	$50,000	"the town of Wilmington for traffic signals and pedestrian safety improvements"	Enacted names the town
FY2025	$50,000	"purchasing a drone, supportive equipment, training, and other necessary expenditures for the Wilmington police department"	Enacted names the town
FY2024	$50,000	"the restoration and improvement of the Rotary park playground and facility improvements to the Rotary park public baseball fields in the town of…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wilmington received 32% of its proportional share of competitive grant awards.

Local road miles **97.4** 102nd of 351 · 4.2 per 1,000 residents (273rd of 351)	Town-owned bridges, replacement cost **$9M** scored exposure $1.9M · one in poor condition	Road-stream crossings **66** 207th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **17.0 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **23,359** residents plus seasonal	Core infrastructure index **0.21** roads, culverts, dams, coast, flood, energy

Burden index 0.32; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$731** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$2,150** statewide $117 · FY2026	New growth per resident **$38,978** FY2017–2025 · 58th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.9% of Wilmington's general-fund spending in FY2025, down from 13.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.3%** $8.7M of $65.3M · median town 14.1%	FY2016 **14.8%** $13.7M of $92.3M · median town 12.2%	FY2025 **11.9%** $15.6M of $131M · median town 11.5%	Net of state charges, FY2025 **11.1%** FY2010: 18.5% · median town 10.0%

Wilmington's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.6 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wilmington's state aid kept pace with both price measures: FY2025 aid was 15.9% above its FY2006 aid grown by Boston-area consumer prices and 3.0% above grown by the government price index.

Gross state aid went from $8.7 million in FY2006 to $15.6 million in FY2025, +79.8% in dollars. Flag: in FY2010, $2.1 million of Wilmington's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+59.1%** $14.5M to $23.1M · all towns +54.0%	All fixed costs, FY2016–25 **+65.3%** $17.7M to $29.2M · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wilmington's health insurance would have been $18.1 million in FY2025; it was $23.1 million, $4.97 million above the path. Its fixed costs would have been $22.1 million in FY2025; it was $29.2 million, $7.14 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wilmington came to $650,000, 7.6% of the $8.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$650,000	7.6%	28.2%
Placed in the town	$650,000	7.6%	42.3%
Everything placed	$650,000	7.6%	45.2%

SCHOOLS

Wilmington's required school contribution is 2.7% of median household income, 147th highest of 351.

Chapter 70 aid, FY2026 **$14.2M** to the town's district	Required local contribution **$36.4M** FY2026
Share of household income **2.7%** 147th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–2%** after inflation

Wilmington runs its own school district and also belongs to Shawsheen Valley; Wilmington accounts for 24% of that district's foundation budget.

EXPECTED AND ACTUAL

Wilmington received $5.4 million in earmarks placed in the town and competitive grants over ten years, 93% of the $5.9 million its size, need and institutions predict.

PEERS

Wilmington ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wilmington this town	**42**	**$9,651**	**$202**	**$31.68**	**0.32**	**2.7%**
Ashland peer	36	$7,807	$843	$98.35	1.10	3.0%
Longmeadow peer	28	$7,493	$122	$37.08	0.57	3.4%
Melrose peer	35	$7,621	$417	$63.68	2.22	2.7%
Charlton peer	56	$14,031	$197	$23.82	0.74	3.0%
Rehoboth peer · lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%
Medway best in class of 30	49	$11,769	$234	$182	1.08	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Winchendon

Town · Worcester County · 10,440 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

2nd Worcester · Jonathan D. Zlotnik
66% of residents
2nd Franklin · Susannah M. Whipps
34% of residents
Winchendon is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Hampshire, Franklin and Worcester · Joanne M. Comerford

SCHOOL DISTRICTS

Winchendon Public Schools, the town's own district
Montachusett Regional Vocational Technical School District, vocational, shared with Ashburnham, Ashby, Athol, Barre, Fitchburg, Gardner, Harvard, Holden and nine others

REGIONAL PLANNING AGENCY

Montachusett Regional Planning Commission

FAIRNESS INDEX

Winchendon scores 62 on the Fairness Index for all state aid and 59 for discretionary money. Fifty is a fair share.

ALL STATE AID

62 / 100
38th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
64	53	62	67

Rank under other weightings: 27th to 49th.

Stable high: above 55 under every weighting

Winchendon received more than its share of state aid on all four measures; its blended score of 62 stays between 59 and 64 under every weighting tested.

DISCRETIONARY MONEY ONLY

59 / 100
145th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	49	64	64

Rank under other weightings: 133rd to 161st.

Stable high: above 55 under every weighting

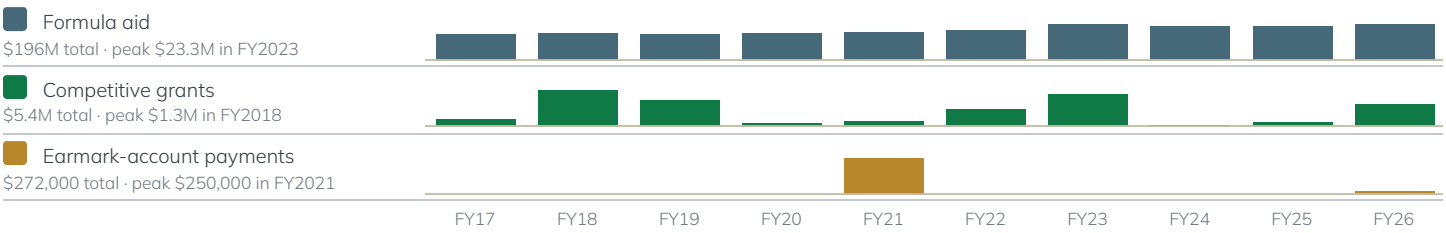
Winchendon received more than its share of discretionary money on three of four measures; its blended score of 59 stays between 56 and 62 under every weighting tested.

STATE MONEY, FY2017–FY2026

Winchendon's town government and school districts received $196 million in formula aid and $5.4 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$196M	**$5.4M**	**$272,000**
$18,732 per resident (37th of 351) · gross	$518 per resident (136th of 351)	$26.08 per resident (169th of 351)

Competitive grants to Winchendon peaked in FY2018 at $1.3 million, 23% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $8 million, are not shown.

EARMARKS

Winchendon received $445,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$445,000	**$445,000**	**$445,000**	**Not a member**
$42.62 per resident (168th of 351)	$42.62 per resident (189th of 351)	$42.62 per resident (192nd of 351)	35 municipalities had none

Placed in the town: six clauses in six of ten budgets; the most recent in FY2026. Every one names Winchendon directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2021	$250,000	"COVID-19 related repairs in the town of Winchendon"	Enacted names the town
FY2017	$100,000	"the planning, engineering and construction for the redesign of the intersection of Front street, Central street and Spring street in the town of…"	Enacted names the town
FY2023	$25,000	"maintenance and improvements to Cathy's House in the town of Winchendon"	Enacted names the town
FY2022	$25,000	"maintenance and improvements for Cathy's House in the town of Winchendon"	Enacted names the town
FY2018	$25,000	"the intersection of Front street, Central street and Spring street in the town of Winchendon"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Winchendon received 1.52 times its proportional share of competitive grant awards.

Local road miles **101.9** 91st of 351 · 9.8 per 1,000 residents (111th of 351)	Town-owned bridges, replacement cost **$17M** scored exposure $8.8M · two in poor condition	Road-stream crossings **99** 118th of 351 · culverts and small crossings	Town-owned hazard dams **3** high or significant hazard
Land area **43.0 sq mi** 17% state-owned	Seasonal homes **4%** share of housing units	Peak service population **10,868** residents plus seasonal	Core infrastructure index **2.90** roads, culverts, dams, coast, flood, energy

Burden index 1.52; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **2,834 acres** 10.3% of land area · FY2026	State-owned land PILOT, FY2026 **$186,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$65.61** statewide $117 · FY2026	New growth per resident **$7,960** FY2017–2025 · 338th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 48.0% of Winchendon's general-fund spending in FY2025, down from 50.0% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **50.0%** $12.6M of $25.2M · median town 14.1%	FY2016 **52.0%** $13.8M of $26.5M · median town 12.2%	FY2025 **48.0%** $16.9M of $35.3M · median town 11.5%	Net of state charges, FY2025 **45.1%** FY2010: 49.7% · median town 10.0%

Winchendon's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $1.3 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Winchendon's state aid did not keep pace with either price measure: FY2025 aid was 13.3% below its FY2006 aid grown by Boston-area consumer prices and 23.0% below grown by the government price index.

Gross state aid went from $12.6 million in FY2006 to $16.9 million in FY2025, +34.4% in dollars. Flag: in FY2010, $893,000 of Winchendon's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+13.2%** $2M to $2.3M · all towns +54.0%	All fixed costs, FY2016–25 **+29.8%** $4M to $5.2M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **3 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Winchendon's health insurance would have been $2.55 million in FY2025; it was $2.31 million, $237,000 below the path. Its fixed costs would have been $4.97 million in FY2025; it was $5.16 million, $195,000 above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Winchendon came to $425,000, 157.3% of the $270,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$425,000	157.3%	28.2%
Placed in the town	$425,000	157.3%	42.3%
Everything placed	$425,000	157.3%	45.2%

SCHOOLS

Winchendon's required school contribution is 2.6% of median household income, 192nd highest of 351.

Chapter 70 aid, FY2026 **$15.6M** to the town's district	Required local contribution **$7.4M** FY2026
Share of household income **2.6%** 192nd of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Winchendon runs its own school district and also belongs to Montachusett; Winchendon accounts for 6% of that district's foundation budget.

EXPECTED AND ACTUAL

Winchendon received $6.7 million in earmarks placed in the town and competitive grants over ten years, 87% of the $7.7 million its size, need and institutions predict.

PEERS

Winchendon ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Winchendon this town	**62**	**$18,732**	**$518**	**$42.62**	**1.52**	**2.6%**
Ware peer	61	$18,604	$846	$22.39	1.01	2.4%
Athol peer	68	$23,699	$853	$117	1.25	1.4%
North Adams peer	72	$21,747	$1,967	$32.72	3.15	2.5%
Adams peer	64	$19,320	$1,327	$27.87	2.22	2.2%
Orange peer	66	$23,109	$1,214	$123	2.59	3.0%
Chelsea best in class of 30	77	$32,370	$919	$147	3.69	2.6%
North Brookfield lowest in class of 30	56	$15,678	$1,128	$7.35	0.87	2.9%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Winchester

Town · Middlesex County · 23,406 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

31st Middlesex · Michael S. Day 88% of residents
15th Middlesex · Michelle L. Ciccolo 12% of residents

Winchester is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fifth Middlesex · Jason M. Lewis 51% of residents
Second Middlesex · Patricia D. Jehlen 49% of residents

SCHOOL DISTRICTS

Winchester Public Schools, the town's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Saugus, Stoneham and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Winchester scores 28 on the Fairness Index for all state aid and 10 for discretionary money. Fifty is a fair share.

ALL STATE AID

28 / 100

329th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
26	45	18	21

Rank under other weightings: 297th to 345th.

Stable low: below 45 under every weighting

Winchester received less than its share of state aid on all four measures; its blended score of 28 stays between 23 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

10 / 100

347th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
8	17	10	6

Rank under other weightings: 344th to 348th.

Stable low: below 45 under every weighting

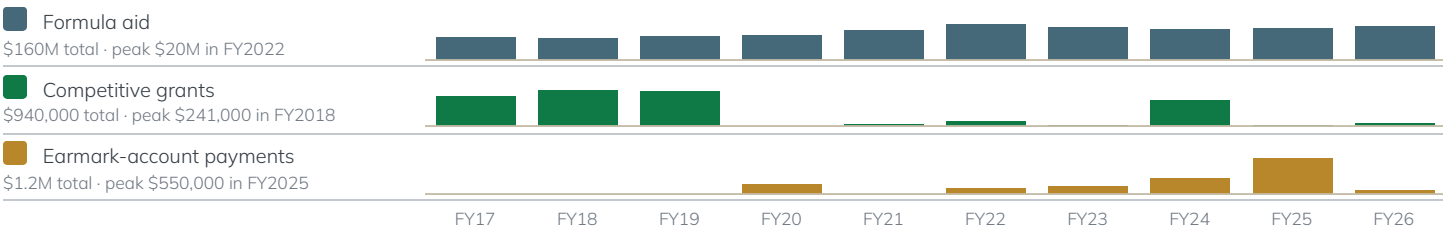
Winchester received less than its share of discretionary money on all four measures; its blended score of 10 stays between 8 and 12 under every weighting tested.

STATE MONEY, FY2017–FY2026

Winchester's town government and school districts received $160 million in formula aid and $940,000 in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$160M	**$940,000**	**$1.2M**
$6,820 per resident (299th of 351) · gross	$40.16 per resident (349th of 351)	$53.14 per resident (73rd of 351)

Competitive grants to Winchester peaked in FY2018 at $241,000, 26% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $7.6 million, are not shown.

EARMARKS

Winchester received $1.1 million in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$1.1M	**$1.1M**	**$1.1M**	**Not a member**
$49.13 per resident (152nd of 351)	$49.13 per resident (175th of 351)	$49.13 per resident (178th of 351)	35 municipalities had none

Placed in the town: 13 clauses in nine of ten budgets; the most recent in FY2026. Every one names Winchester directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$200,000	"the design, renovation and maintenance of recreational parks and facilities in the town of Winchester"	Enacted names the town
FY2023	$200,000	"the town of Winchester for the purchase and operation of a snow removal vehicle"	Enacted names the town
FY2026	$150,000	"the town of Winchester for improvements and environmental remediation of Wedge pond"	Enacted names the town
FY2025	$100,000	"the purchase, operation and maintenance of solid waste management equipment and practices in the town of Winchester"	Enacted names the town
FY2022	$100,000	"the town of Winchester for improvements to Winter pond"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Winchester received 45% of its proportional share of competitive grant awards.

Local road miles **73.0** 179th of 351 · 3.1 per 1,000 residents (313th of 351)	Town-owned bridges, replacement cost **$22.4M** scored exposure $7.8M · one in poor condition	Road-stream crossings **33** 310th of 351 · culverts and small crossings	Town-owned hazard dams **5** high or significant hazard
Land area **6.0 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **23,475** residents plus seasonal	Core infrastructure index **1.18** roads, culverts, dams, coast, flood, energy

Burden index 0.45; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **62 acres** 1.6% of land area · FY2026	State-owned land PILOT, FY2026 **$35,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$571** statewide $117 · FY2026	New growth per resident **$32,102** FY2017–2025 · 97th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 8.8% of Winchester's general-fund spending in FY2025, down from 9.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.9%** $6M of $61.2M · median town 14.1%	FY2016 **10.9%** $9.8M of $90.4M · median town 12.2%	FY2025 **8.8%** $12.7M of $144M · median town 11.5%	Net of state charges, FY2025 **8.4%** FY2010: 8.9% · median town 10.0%

Winchester's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $25,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Winchester's state aid kept pace with both price measures: FY2025 aid was 35.7% above its FY2006 aid grown by Boston-area consumer prices and 20.6% above grown by the government price index.

Gross state aid went from $6 million in FY2006 to $12.7 million in FY2025, +110.5% in dollars. Flag: in FY2010, $704,000 of Winchester's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+48.7%** $9.4M to $14M · all towns +54.0%	All fixed costs, FY2016–25 **+57.1%** $14.9M to $23.3M · all towns +53.0%	Years squeezed **6 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Winchester's health insurance would have been $11.7 million in FY2025; it was $14 million, $2.24 million above the path. Its fixed costs would have been $18.6 million in FY2025; it was $23.3 million, $4.79 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Winchester came to $1 million, 21.8% of the $4.58 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1M	21.8%	28.2%
Placed in the town	$1M	21.8%	42.3%
Everything placed	$1M	21.8%	45.2%

SCHOOLS

Winchester's required school contribution is 2.5% of median household income, 235th highest of 351.

Chapter 70 aid, FY2026 **$11.4M** to the town's district	Required local contribution **$47.5M** FY2026
Share of household income **2.5%** 235th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+7%** after inflation

Winchester runs its own school district and also belongs to Northeast Metropolitan; Winchester accounts for 1% of that district's foundation budget.

EXPECTED AND ACTUAL

Winchester received $2.4 million in earmarks placed in the town and competitive grants over ten years, 32% of the $7.4 million its size, need and institutions predict.

PEERS

Winchester ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Winchester this town	**28**	**$6,820**	**$40.16**	**$49.13**	**0.45**	**2.5%**
Hingham peer	30	$6,498	$83.05	$90.15	0.24	2.2%
Marblehead peer	29	$6,094	$187	$21.64	0.50	1.9%
Scituate peer	34	$7,209	$711	$18.25	3.23	2.9%
Westwood peer	27	$6,423	$120	$45.96	0.30	2.5%
Lexington peer	36	$9,001	$61.92	$113	0.57	2.7%
Milton best in class of 30	31	$7,307	$76.91	$270	0.50	2.8%
Nantucket lowest in class of 30	25	$5,145	$383	$17.26	0.81	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BERKSHIRE COUNTY

Windsor

Town · Berkshire County · 1,065 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE
1st Berkshire · John Barrett, III

STATE SENATE
Berkshire, Hampden, Franklin and Hampshire · Paul W. Mark

SCHOOL DISTRICTS
Central Berkshire Regional School District, shared with Becket, Cummington, Dalton, Hinsdale, Peru and Washington

REGIONAL PLANNING AGENCY
Berkshire Regional Planning Commission

FAIRNESS INDEX

Windsor scores 53 on the Fairness Index for all state aid and 95 for discretionary money. Fifty is a fair share.

ALL STATE AID

53 / 100

98th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	52	41	69

Rank under other weightings: 65th to 133rd.

Weighting-dependent: the range crosses the 45–55 band

Windsor received more than its share of state aid on three of four measures; its blended score of 53 stays between 48 and 58 under every weighting tested.

DISCRETIONARY MONEY ONLY

95 / 100

22nd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
96	96	88	98

Rank under other weightings: 16th to 27th.

Stable high: above 55 under every weighting

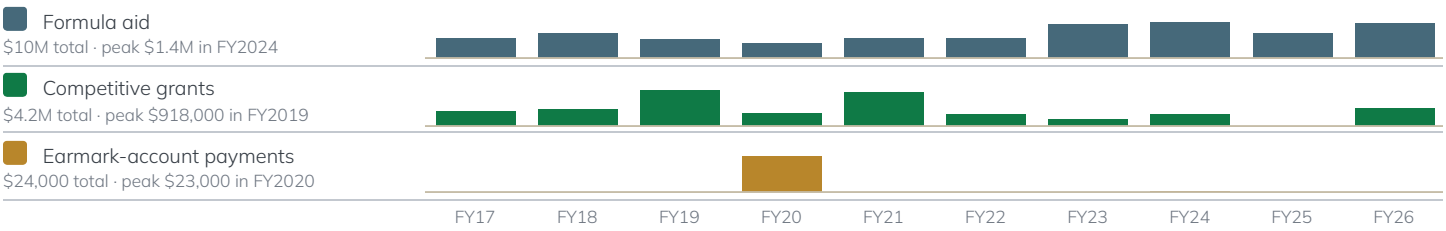
Windsor received more than its share of discretionary money on all four measures; its blended score of 95 stays between 93 and 96 under every weighting tested.

STATE MONEY, FY2017–FY2026

Windsor's town government and school districts received $10 million in formula aid and $4.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$10M	**$4.2M**	**$24,000**
$9,357 per resident (201st of 351) · gross	$3,955 per resident (22nd of 351)	$22.23 per resident (190th of 351)

Competitive grants to Windsor peaked in FY2019 at $918,000, 22% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $1 million, are not shown.

EARMARKS

Windsor received $25,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$25,000	**$25,000**	**$25,000**	**Not a member**
$23.47 per resident (254th of 351)	$23.47 per resident (263rd of 351)	$23.47 per resident (264th of 351)	35 municipalities had none

Placed in the town: one clause in one of ten budgets; it came in FY2020. Every one names Windsor directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$25,000	"the celebration of the 250th anniversary of the town of Windsor"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Windsor received 1.38 times its proportional share of competitive grant

awards.

Local road miles **62.3** 211th of 351 · 58.5 per 1,000 residents (15th of 351)	Town-owned bridges, replacement cost **$15.6M** scored exposure $4.5M · two in poor condition	Road-stream crossings **68** 203rd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **35.0 sq mi** 28% state-owned	Seasonal homes **22%** share of housing units	Peak service population **1,370** residents plus seasonal	Core infrastructure index **1.91** roads, culverts, dams, coast, flood, energy

Burden index 1.38; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **6,078 acres** 27.1% of land area · FY2026	State-owned land PILOT, FY2026 **$160,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$26.35** statewide $117 · FY2026	New growth per resident **$20,064** FY2017–2025 · 181st of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 12.4% of Windsor's general-fund spending in FY2025, up from 9.9% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.9%** $152,000 of $1.5M · median town 14.1%	FY2016 **12.1%** $234,000 of $1.9M · median town 12.2%	FY2025 **12.4%** $321,000 of $2.6M · median town 11.5%	Net of state charges, FY2025 **12.3%** FY2010: 11.7% · median town 10.0%

Windsor's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $162,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Windsor's state aid kept pace with both price measures: FY2025 aid was 35.7% above its FY2006 aid grown by Boston-area consumer prices and 20.6% above grown by the government price index.

Gross state aid went from $152,000 in FY2006 to $321,000 in FY2025, +110.4% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+46.7%** $30,000 to $45,000 · all towns +54.0%	All fixed costs, FY2016–25 **+43.0%** $120,000 to $172,000 · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Windsor's health insurance would have been $38,000 in FY2025; it was $45,000, $6,636 above the path. Its fixed costs would have been $150,000 in FY2025; it was $172,000, $22,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2023 (+50%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Windsor came to $25,000, 175.8% of the $14,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$25,000	175.8%	28.2%
Placed in the town	$25,000	175.8%	42.3%
Everything placed	$25,000	175.8%	45.2%

SCHOOLS

Windsor's required school contribution is 1.5% of median household income, 339th highest of 351.

Chapter 70 aid, FY2026 **$247,000** attributed to the town	Required local contribution **$786,000** FY2026
Share of household income **1.5%** 339th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–7%** after inflation

EXPECTED AND ACTUAL

Windsor received $4.2 million in earmarks placed in the town and competitive grants over ten years, 2.3 times the $1.9 million its size, need and institutions predict.

Windsor has no school district of its own. Its pupils attend Windsor and Central Berkshire; Windsor accounts for 100% and 4% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

PEERS

Windsor ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Windsor this town	**53**	**$9,357**	**$3,955**	**$23.47**	**1.38**	**1.5%**
Cummington peer · lowest in class of 30	49	$9,157	$4,050	$0	1.51	1.5%
Chester peer	61	$16,538	$4,421	$0	2.11	2.4%
Shutesbury peer	62	$14,882	$4,462	$0	0.50	2.0%
Oakham peer	61	$18,722	$794	$12.20	1.24	3.2%
Conway peer	48	$12,799	$405	$0	0.68	2.5%
Chesterfield best in class of 30	65	$13,176	$12,060	$213	1.15	2.7%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

SUFFOLK COUNTY

Winthrop

City · Suffolk County · 18,759 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

19th Suffolk · Jeffrey Rosario Turco

STATE SENATE

Third Suffolk · Lydia Edwards

SCHOOL DISTRICTS

Winthrop Public Schools, the city's own district

Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Saugus, Stoneham and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Winthrop scores 40 on the Fairness Index for all state aid and 64 for discretionary money. Fifty is a fair share.

ALL STATE AID

40 / 100

212th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	37	43	44

Rank under other weightings: 184th to 252nd.

Stable low: below 45 under every weighting

Winthrop received less than its share of state aid on all four measures; its blended score of 40 stays between 38 and 42 under every weighting tested.

DISCRETIONARY MONEY ONLY

64 / 100

130th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
60	60	68	66

Rank under other weightings: 119th to 140th.

Stable high: above 55 under every weighting

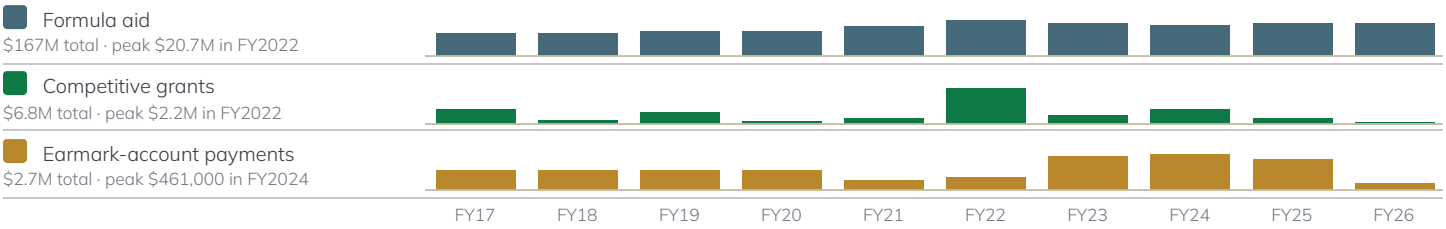
Winthrop received more than its share of discretionary money on all four measures; its blended score of 64 stays between 61 and 66 under every weighting tested.

STATE MONEY, FY2017–FY2026

Winthrop's town government and school districts received $167 million in formula aid and $6.8 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$167M	**$6.8M**	**$2.7M**
$8,903 per resident (223rd of 351) · gross	$365 per resident (183rd of 351)	$142 per resident (13th of 351)

Competitive grants to Winthrop peaked in FY2022 at $2.2 million, 33% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $14.3 million, are not shown.

EARMARKS

Winthrop received $3.5 million in local earmarks naming the town, $3 million placed in the town and $3.5 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$3.5M	**$3M**	**$3.5M**	**Not a member**
$185 per resident (8th of 351)	$158 per resident (17th of 351)	$185 per resident (20th of 351)	35 municipalities had none

Placed in the town: 36 clauses in nine of ten budgets; the most recent in FY2026. Every one names Winthrop directly.

Names the town includes $514,000 in clauses that name Winthrop but fund a state facility or a MassHealth rate add-on; those count under everything placed, not placed in the town.

Everything placed, the third measure, adds $514,000 in four clauses for state facilities located in Winthrop (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2024	$1M	"subsidize ferry services administered by the city known as the town of Winthrop during the full-time closure of the Sumner tunnel"	Enacted names the town
FY2024	$250,000	"public schools in the city known as the town of Winthrop for the implementation of English as a second language instruction and technological support"	Enacted names the town
FY2023	$250,000 (split four ways)	"the operation of a water ferry connecting the city known as the town of Winthrop, the cities of Lynn and Quincy and the East Boston section of the…"	Enacted names the town
FY2025	$200,000	"the city known as the town of Winthrop in public schools for the implementation of English as a second language instruction and technological support"	Enacted names the town
FY2020	$200,000	"the United Way of Tri-County's Call 2 Talk program"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Winthrop received 60% of its proportional share of competitive grant awards.

Local road miles **36.0** 307th of 351 · 1.9 per 1,000 residents (337th of 351)	Town-owned bridges, replacement cost **$6M** scored exposure $552,000 · none in poor condition	Road-stream crossings **0** 346th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **2.0 sq mi** 3% state-owned	Seasonal homes **1%** share of housing units	Peak service population **19,041** residents plus seasonal	Core infrastructure index **1.51** roads, culverts, dams, coast, flood, energy

Burden index 0.60; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** no eligible state land in FY2026	State-owned land PILOT, FY2026 **$0** payment in lieu of taxes, cherry sheet	PILOT per eligible acre not applicable no eligible acres · statewide $117	New growth per resident **$11,009** FY2017–2025 · 305th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 24.9% of Winthrop's general-fund spending in FY2025, down from 31.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **31.1%** $10.8M of $34.7M · median town 14.1%	FY2016 **23.7%** $10.5M of $44.5M · median town 12.2%	FY2025 **24.9%** $15.7M of $62.8M · median town 11.5%	Net of state charges, FY2025 **23.0%** FY2010: 24.6% · median town 10.0%

Winthrop's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $492,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Winthrop's state aid did not keep pace with either price measure: FY2025 aid was 6.4% below its FY2006 aid grown by Boston-area consumer prices and 16.8% below grown by the government price index.

Gross state aid went from $10.8 million in FY2006 to $15.7 million in FY2025, +45.2% in dollars. Flag: in FY2010, $662,000 of Winthrop's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+44.9%** $5.6M to $8.1M · all towns +54.0%	All fixed costs, FY2016–25 **+42.2%** $9.1M to $12.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Winthrop's health insurance would have been $6.98 million in FY2025; it was $8.10 million, $1.12 million above the path. Its fixed costs would have been $11.3 million in FY2025; it was $12.9 million, $1.57 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Winthrop came to $3.2 million, 127.6% of the $2.51 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	**Earmarks**	**Share of the increase**	**All towns, pooled**
Names the town	$3.2M	127.6%	28.2%
Placed in the town	$2.8M	112.2%	42.3%
Everything placed	$3.2M	127.6%	45.2%

SCHOOLS

Winthrop's required school contribution is 2.4% of median household income, 248th highest of 351.

Chapter 70 aid, FY2026 **$10.9M** to the town's district	Required local contribution **$22.3M** FY2026
Share of household income **2.4%** 248th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+14%** after inflation

Winthrop runs its own school district and also belongs to Northeast Metropolitan; Winthrop accounts for 4% of that district's foundation budget.

EXPECTED AND ACTUAL

Winthrop received $12.7 million in earmarks placed in the town and competitive grants over ten years, 57% more than the $8 million its size, need and institutions predict.

PEERS

Winthrop ranks 1st of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Winthrop this town	**40**	**$8,903**	**$365**	**$158**	**0.60**	**2.4%**
Hudson peer	42	$10,896	$229	$66.49	0.91	3.1%
Amesbury peer	39	$9,706	$676	$64.69	2.17	2.8%
Rockland peer	52	$13,816	$523	$41.44	1.27	2.5%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Maynard peer	40	$10,015	$584	$95.69	2.79	2.5%
Holbrook best in class of 30	62	$18,686	$238	$187	0.92	2.4%
Carver lowest in class of 30	50	$13,650	$330	$7.68	0.83	3.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

MIDDLESEX COUNTY

Woburn

City · Middlesex County · 41,939 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

30th Middlesex · Richard M. Haggerty
73% of residents
15th Middlesex · Michelle L. Ciccolo
27% of residents
Woburn is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Fourth Middlesex · Cindy F. Friedman

SCHOOL DISTRICTS

Woburn Public Schools, the city's own district
Northeast Metropolitan Regional Vocational Technical School District, vocational, shared with Chelsea, Malden, Melrose, North Reading, Reading, Revere, Saugus, Stoneham and three others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Woburn scores 31 on the Fairness Index for all state aid and 40 for discretionary money. Fifty is a fair share.

ALL STATE AID

31 / 100
298th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
27	29	31	37

Rank under other weightings: 260th to 324th.

Stable low: below 45 under every weighting

Woburn received less than its share of state aid on all four measures; its blended score of 31 stays between 29 and 33 under every weighting tested.

DISCRETIONARY MONEY ONLY

40 / 100
225th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
37	40	33	48

Rank under other weightings: 210th to 240th.

Stable low: below 45 under every weighting

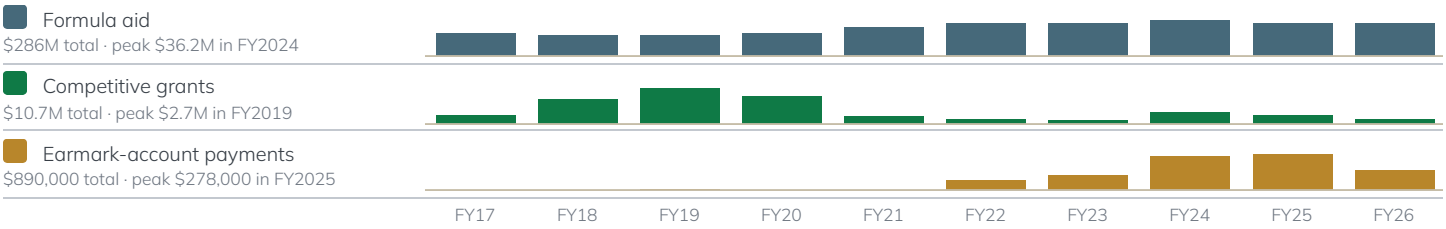
Woburn received less than its share of discretionary money on all four measures; its blended score of 40 stays between 37 and 42 under every weighting tested.

STATE MONEY, FY2017–FY2026

Woburn's town government and school districts received $286 million in formula aid and $10.7 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$286M	$10.7M	$890,000
$6,812 per resident (301st of 351) · gross	$255 per resident (226th of 351)	$21.21 per resident (195th of 351)

Competitive grants to Woburn peaked in FY2019 at $2.7 million, 25% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $58.9 million, are not shown.

EARMARKS

Woburn received $2.1 million in local earmarks naming the town, $3.6 million placed in the town and $3.6 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$2.1M	$3.6M	$3.6M	Not a member
$50.76 per resident (146th of 351)	$85.93 per resident (92nd of 351)	$85.93 per resident (98th of 351)	35 municipalities had none

Placed in the town: 41 clauses in ten of ten budgets; the most recent in FY2026. $2.1 million came in clauses that name Woburn; the other $1.5 million went to organizations based in Woburn, some of which serve a wider area.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2020	$200,000	"as grants for the Bay State Games"	Enacted recipient based here
FY2019	$200,000	"Bay State Games"	Enacted recipient based here
FY2018	$200,000	"as grants for the Bay State Games"	Enacted recipient based here
FY2017	$200,000	"as grants for the Bay State Games"	Enacted recipient based here
FY2024	$175,000	"the Woburn Youth Hockey Association, Inc. for capital improvements to the O'Brien ice rink"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Woburn received 44% of its proportional share of competitive grant awards.

Local road miles **131.2** 50th of 351 · 3.1 per 1,000 residents (311th of 351)	Town-owned bridges, replacement cost **$4.3M** scored exposure $1.1M · one in poor condition	Road-stream crossings **135** 58th of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **12.6 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **41,964** residents plus seasonal	Core infrastructure index **2.67** roads, culverts, dams, coast, flood, energy

Burden index 0.44; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **0 acres** 0.0% of land area · FY2026	State-owned land PILOT, FY2026 **$3,816** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$10,903** statewide $117 · FY2026	New growth per resident **$50,500** FY2017–2025 · 37th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 11.8% of Woburn's general-fund spending in FY2025, down from 13.1% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **13.1%** $12.1M of $92.9M · median town 14.1%	FY2016 **11.8%** $14.6M of $124M · median town 12.2%	FY2025 **11.8%** $22.9M of $194M · median town 11.5%	Net of state charges, FY2025 **8.9%** FY2010: 8.0% · median town 10.0%

Woburn's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $608,000 in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Woburn's state aid kept pace with both price measures: FY2025 aid was 22.0% above its FY2006 aid grown by Boston-area consumer prices and 8.4% above grown by the government price index.

Gross state aid went from $12.1 million in FY2006 to $22.9 million in FY2025, +89.2% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+23.6%** $17.3M to $21.4M · all towns +54.0%	All fixed costs, FY2016–25 **+31.5%** $25.3M to $33.2M · all towns +53.0%	Years squeezed **2 of 9** fixed costs grew faster than allowed levy growth	Health insurance **1 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Woburn's health insurance would have been $21.6 million in FY2025; it was $21.4 million, $221,000 below the path. Its fixed costs would have been $31.5 million in FY2025; it was $33.2 million, $1.68 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Woburn came to $1.7 million, 40.9% of the $4.08 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$1.7M	40.9%	28.2%
Placed in the town	$3M	73.9%	42.3%
Everything placed	$3M	73.9%	45.2%

SCHOOLS

Woburn's required school contribution is 3.5% of median household income, 18th highest of 351.

Chapter 70 aid, FY2026 **$16.1M** to the town's district	Required local contribution **$63.1M** FY2026
Share of household income **3.5%** 18th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+38%** after inflation

Woburn runs its own school district and also belongs to Northeast Metropolitan; Woburn accounts for 9% of that district's foundation budget.

EXPECTED AND ACTUAL

Woburn received $18.2 million in earmarks placed in the town and competitive grants over ten years, 13% more than the $16.1 million its size, need and institutions predict.

PEERS

Woburn ranks 2nd of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Woburn this town	**31**	**$6,812**	**$255**	**$85.93**	**0.44**	**3.5%**
Waltham peer	28	$6,149	$102	$54.73	0.45	2.8%
North Andover peer	26	$6,381	$213	$31.72	0.89	3.1%
Somerville peer	40	$7,819	$474	$31.51	2.18	1.7%
Marshfield peer · best in class of 30	38	$9,344	$361	$162	1.35	3.2%
Medford peer	32	$6,237	$331	$49.53	2.03	1.9%
Harwich lowest in class of 30	24	$5,502	$93.86	$4.93	0.59	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

WORCESTER COUNTY

Worcester

City · Worcester County · 207,055 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

13th Worcester · John J. Mahoney 22% of residents
16th Worcester · Daniel M. Donahue 22% of residents
15th Worcester · Mary S. Keefe 21% of residents
17th Worcester · David Henry Argosky LeBoeuf 18% of residents
14th Worcester · James J. O'Day 17% of residents

Worcester is split among five House districts. Shares are of 2020 residents.

STATE SENATE

First Worcester · Robyn K. Kennedy 63% of residents
Second Worcester · Michael O. Moore 27% of residents
Worcester and Hampshire · Peter J. Durant 10% of residents

SCHOOL DISTRICTS

Worcester Public Schools, the city's own district

REGIONAL PLANNING AGENCY

Central Massachusetts Regional Planning Commission

FAIRNESS INDEX

Worcester scores 65 on the Fairness Index for all state aid and 52 for discretionary money. Fifty is a fair share.

ALL STATE AID

65 / 100

23rd of 351 (1 = most above its share)

Equal	Need	Burden	Effort
66	54	66	73

Rank under other weightings: 18th to 40th.

Stable high: above 55 under every weighting

Worcester received more than its share of state aid on all four measures; its blended score of 65 stays between 62 and 68 under every weighting tested.

DISCRETIONARY MONEY ONLY

52 / 100

176th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
52	40	55	60

Rank under other weightings: 156th to 193rd.

Weighting-dependent: the range crosses the 45–55 band

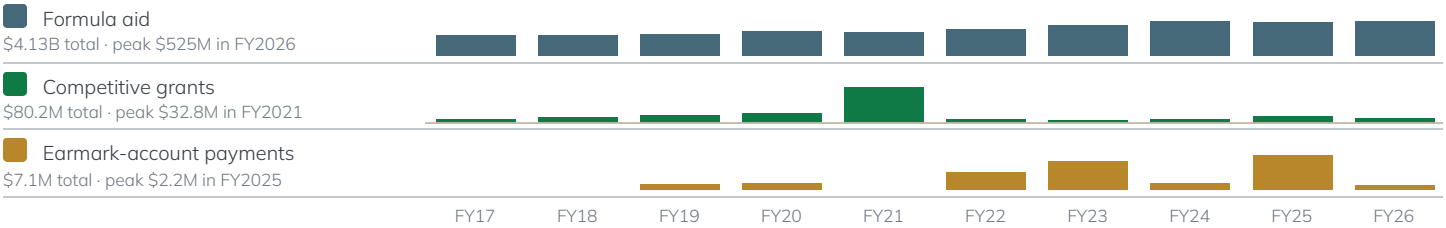
Worcester received more than its share of discretionary money on three of four measures; its blended score of 52 stays between 48 and 55 under every weighting tested.

STATE MONEY, FY2017–FY2026

Worcester's town government and school districts received $4.13 billion in formula aid and $80.2 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$4.13B	**$80.2M**	**$7.1M**
$19,940 per resident (27th of 351) · gross	$387 per resident (175th of 351)	$34.45 per resident (134th of 351)

Competitive grants to Worcester peaked in FY2021 at $32.8 million, 41% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $239 million, are not shown.

EARMARKS

Worcester received $13.1 million in local earmarks naming the town, $19.3 million placed in the town and $20.2 million counting everything placed, in ten enacted budgets.

Names the town	Placed in the town	Everything placed	Losers Club
$13.1M	**$19.3M**	**$20.2M**	**Not a member**
$63.43 per resident (104th of 351)	$93.01 per resident (82nd of 351)	$97.76 per resident (83rd of 351)	35 municipalities had none

Placed in the town: 192 clauses in ten of ten budgets; the most recent in FY2026. $13.1 million came in clauses that name Worcester; the other $6.1 million went to organizations based in Worcester, some of which serve a wider area.

Everything placed, the third measure, adds $983,000 in eight clauses for state facilities located in Worcester (such as state universities, courts, state parks or the metropolitan beaches) or MassHealth rate add-ons for providers here.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2026	$500,000	"the operations of Veterans Inc. for services to veterans including, but not limited to, employment training and substance use treatment"	Enacted recipient based here
FY2023	$500,000	"the creation and maintenance of a baseball field for the use and benefit of disadvantaged youth in the city of Worcester"	Enacted names the town
FY2026	$450,000	"Father Bill's & MainSpring, Inc., the Western Massachusetts Network to End Homelessness and Central Massachusetts Housing Alliance, Inc. for ongoing..."	Enacted recipient based here
FY2025	$430,000	"the Worcester county court-appointed special advocates program for its court-appointed special advocates program in Worcester county"	Enacted recipient based here
FY2024	$430,000	"the Worcester county court-appointed special advocates program for its court-appointed special advocates program in Worcester county"	Enacted recipient based here

WHAT THE TOWN CARRIES

Measured against what it maintains, Worcester received 90% of its proportional share of competitive grant awards.

Local road miles **434.7** 3rd of 351 · 2.1 per 1,000 residents (334th of 351)	Town-owned bridges, replacement cost **$99.5M** scored exposure $33.3M · one in poor condition	Road-stream crossings **390** 1st of 351 · culverts and small crossings	Town-owned hazard dams **24** high or significant hazard
Land area **37.4 sq mi** 0% state-owned	Seasonal homes **0%** share of housing units	Peak service population **207,895** residents plus seasonal	Core infrastructure index **0.52** roads, culverts, dams, coast, flood, energy

Burden index 0.90; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **208 acres** 0.9% of land area · FY2026	State-owned land PILOT, FY2026 **$316,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$1,518** statewide $117 · FY2026	New growth per resident **$11,906** FY2017–2025 · 295th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 49.1% of Worcester's general-fund spending in FY2025, up from 46.2% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **46.2%** $228M of $493M · median town 14.1%	FY2016 **48.9%** $286M of $586M · median town 12.2%	FY2025 **49.1%** $442M of $900M · median town 11.5%	Net of state charges, FY2025 **43.3%** FY2010: 45.8% · median town 10.0%

Worcester's state aid kept pace with both price measures: FY2025 aid was 25.2% above its FY2006 aid grown by Boston-area consumer prices and 11.3% above grown by the government price index.

Gross state aid went from $228 million in FY2006 to $442 million in FY2025, +94.2% in dollars. Flag: in FY2010, $19.1 million of Worcester's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+76.1%** $84M to $148M · all towns +54.0%	All fixed costs, FY2016–25 **+68.8%** $107M to $180M · all towns +53.0%	Years squeezed **4 of 9** fixed costs grew faster than allowed levy growth	Health insurance **6 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Worcester's health insurance would have been $105 million in FY2025; it was $148 million, $43 million above the path. Its fixed costs would have been $133 million in FY2025; it was $180 million, $46.8 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Worcester came to $10.8 million, 16.9% of the $63.9 million rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$10.8M	16.9%	28.2%
Placed in the town	$16M	25.0%	42.3%
Everything placed	$16.6M	26.0%	45.2%

SCHOOLS

Worcester's required school contribution is 2.4% of median household income, 245th highest of 351.

Chapter 70 aid, FY2026 **$412M** to the town's district	Required local contribution **$136M** FY2026
Share of household income **2.4%** 245th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+31%** after inflation

Worcester runs its own school district.

EXPECTED AND ACTUAL

Worcester received $120 million in earmarks placed in the town and competitive grants over ten years, 15% more than the $104 million its size, need and institutions predict.

PEERS

Worcester ranks 6th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Worcester this town	**65**	**$19,940**	**$387**	**$93.01**	**0.90**	**2.4%**
Springfield peer · best in class of 30	79	$35,424	$352	$178	1.27	1.8%
New Bedford peer	74	$27,251	$466	$126	1.34	1.9%
Lowell peer	70	$24,024	$384	$66.99	0.82	2.3%
Fall River peer	72	$25,031	$426	$77.65	0.89	2.0%
Brockton peer	72	$26,796	$378	$70.10	1.28	2.3%
Chicopee lowest in class of 30	62	$19,031	$203	$19.30	0.65	2.4%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

HAMPSHIRE COUNTY

Worthington

Town · Hampshire County · 1,021 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE	STATE SENATE	SCHOOL DISTRICTS	REGIONAL PLANNING AGENCY
1st Hampshire · Lindsay N. Sabadosa	**Berkshire, Hampden, Franklin and Hampshire** · Paul W. Mark	**Worthington Public Schools**, the town's own district	Pioneer Valley Planning Commission

FAIRNESS INDEX

Worthington scores 45 on the Fairness Index for all state aid and 91 for discretionary money. Fifty is a fair share.

ALL STATE AID

45 / 100

159th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
50	53	36	42

Rank under other weightings: 143rd to 190th.

Weighting-dependent: the range crosses the 45–55 band

Worthington received less than its share of state aid on two of four measures; its blended score of 45 stays between 42 and 49 under every weighting tested.

DISCRETIONARY MONEY ONLY

91 / 100

41st of 351 (1 = most above its share)

Equal	Need	Burden	Effort
93	94	85	90

Rank under other weightings: 39th to 43rd.

Stable high: above 55 under every weighting

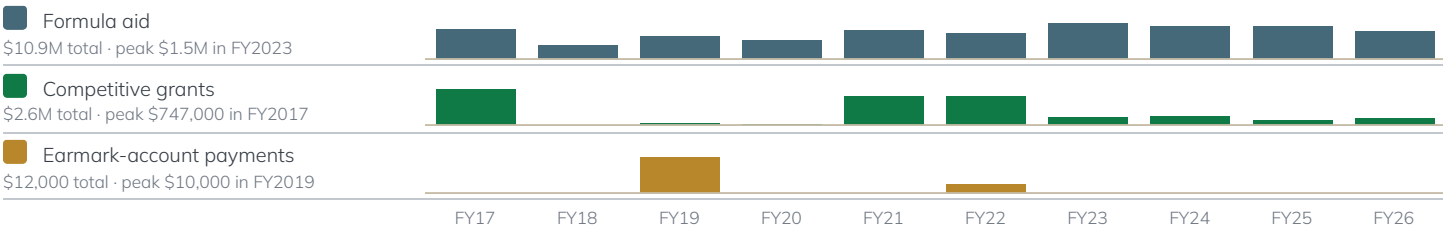
Worthington received more than its share of discretionary money on all four measures; its blended score of 91 stays between 89 and 92 under every weighting tested.

STATE MONEY, FY2017–FY2026

Worthington's town government and school districts received $10.9 million in formula aid and $2.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$10.9M	**$2.6M**	**$12,000**
$10,665 per resident (159th of 351) · gross	$2,563 per resident (37th of 351)	$12.24 per resident (245th of 351)

Competitive grants to Worthington peaked in FY2017 at $747,000, 29% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $453,000, are not shown.

EARMARKS

Worthington received $60,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$60,000	**$60,000**	**$60,000**	**Not a member**
$58.77 per resident (121st of 351)	$58.77 per resident (142nd of 351)	$58.77 per resident (149th of 351)	35 municipalities had none

Placed in the town: two clauses in one of ten budgets; the most recent in FY2019. Every one names Worthington directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2019	$50,000	"the town of Worthington to conduct a comprehensive capital needs study for town-owned buildings"	Enacted names the town
FY2019	$10,000	"the commemoration of the town of Worthington's 250th anniversary celebration"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Worthington received 59% of its proportional share of competitive grant awards.

Local road miles **57.5** 221st of 351 · 56.4 per 1,000 residents (16th of 351)	Town-owned bridges, replacement cost **$16M** scored exposure $3.4M · two in poor condition	Road-stream crossings **61** 226th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **32.0 sq mi** 24% state-owned	Seasonal homes **14%** share of housing units	Peak service population **1,197** residents plus seasonal	Core infrastructure index **0.25** roads, culverts, dams, coast, flood, energy

Burden index 0.59; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **4,302 acres** 21.0% of land area · FY2026	State-owned land PILOT, FY2026 **$153,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$35.50** statewide $117 · FY2026	New growth per resident **$24,645** FY2017–2025 · 142nd of 351 · median town $20,524

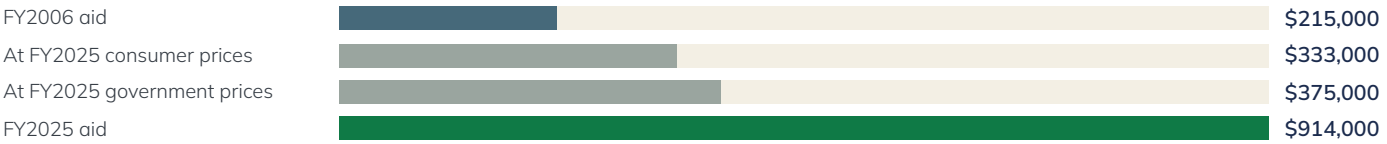
COSTS AND THE 2½% LIMIT

State aid covered 18.2% of Worthington's general-fund spending in FY2025, up from 9.5% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **9.5%** $215,000 of $2.3M · median town 14.1%	FY2016 **15.6%** $505,000 of $3.2M · median town 12.2%	FY2025 **18.2%** $914,000 of $5M · median town 11.5%	Net of state charges, FY2025 **9.9%** FY2010: 7.9% · median town 10.0%

Worthington's state aid kept pace with both price measures: FY2025 aid was 174.6% above its FY2006 aid grown by Boston-area consumer prices and 144.1% above grown by the government price index.



Gross state aid went from $215,000 in FY2006 to $914,000 in FY2025, +325.9% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+134.3%** $146,000 to $342,000 · all towns +54.0%	All fixed costs, FY2016–25 **+196.8%** $263,000 to $780,000 · all towns +53.0%	Years squeezed **7 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Worthington's health insurance would have been $182,000 in FY2025; it was $342,000, $160,000 above the path. Its fixed costs would have been $328,000 in FY2025; it was $780,000, $452,000 above the path.

Flag: health insurance changed by more than 30% in one year in FY2022 (+44%). Swings this size usually mark costs moving between budget lines, into or out of trust funds, or into the state's Group Insurance Commission, so the comparison may reflect accounting as well as cost.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Worthington came to $60,000, 30.6% of the $196,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$60,000	30.6%	28.2%
Placed in the town	$60,000	30.6%	42.3%
Everything placed	$60,000	30.6%	45.2%

SCHOOLS

Worthington's required school contribution is 2.8% of median household income, 139th highest of 351.

Chapter 70 aid, FY2026 **$496,000** to the town's district	Required local contribution **$1.3M** FY2026
Share of household income **2.8%** 139th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+55%** after inflation

EXPECTED AND ACTUAL

Worthington received $3 million in earmarks placed in the town and competitive grants over ten years, 75% of the $4 million its size, need and institutions predict.

Worthington runs its own school district.

PEERS

Worthington ranks 5th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Worthington this town	**45**	**$10,665**	**$2,563**	**$58.77**	**0.59**	**2.8%**
Blandford peer · lowest in class of 30	52	$10,142	$5,405	$0	0.80	2.6%
Chesterfield peer	65	$13,176	$12,060	$213	1.15	2.7%
West Stockbridge peer	43	$9,304	$478	$0	0.46	2.4%
Richmond peer	40	$8,072	$776	$0	0.19	2.2%
Leverett peer	47	$11,884	$1,674	$134	1.95	2.9%
Egremont best in class of 30	51	$9,039	$3,748	$394	2.06	2.0%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

NORFOLK COUNTY

Wrentham

Town · Norfolk County · 12,297 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

9th Norfolk · Marcus S. Vaughn

STATE SENATE

Norfolk, Worcester and Middlesex · Rebecca L. Rausch

SCHOOL DISTRICTS

Wrentham Public Schools, the town's own district
King Philip Regional School District, shared with Norfolk and Plainville
Tri-County Regional Vocational Technical School District, vocational, shared with Franklin, Medfield, Medway, Millis, Norfolk, North Attleborough, Plainville, Seekonk and two others

REGIONAL PLANNING AGENCY

Metropolitan Area Planning Council

FAIRNESS INDEX

Wrentham scores 39 on the Fairness Index for all state aid and 43 for discretionary money. Fifty is a fair share.

ALL STATE AID

39 / 100

225th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
38	48	34	36

Rank under other weightings: 209th to 235th.

Stable low: below 45 under every weighting

Wrentham received less than its share of state aid on all four measures; its blended score of 39 stays between 37 and 41 under every weighting tested.

DISCRETIONARY MONEY ONLY

43 / 100

210th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
41	51	41	40

Rank under other weightings: 204th to 215th.

Weighting-dependent: the range crosses the 45–55 band

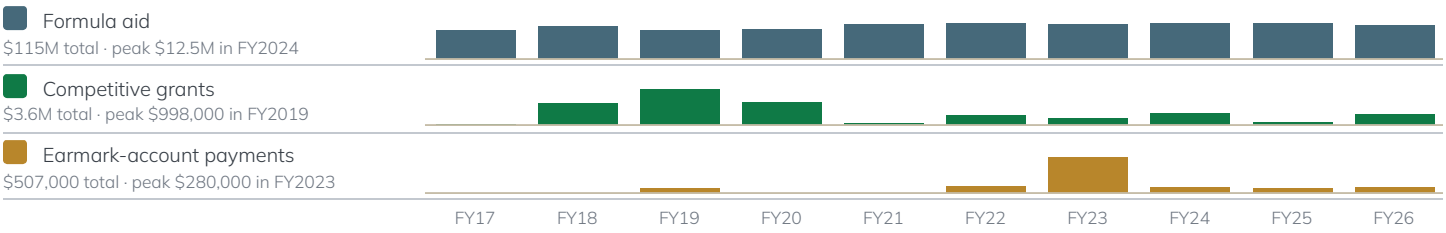
Wrentham received less than its share of discretionary money on three of four measures; its blended score of 43 stays between 42 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Wrentham's town government and school districts received $115 million in formula aid and $3.6 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$115M	**$3.6M**	**$507,000**
$9,318 per resident (205th of 351) · gross	$289 per resident (213th of 351)	$41.23 per resident (105th of 351)

Competitive grants to Wrentham peaked in FY2019 at $998,000, 28% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $11.6 million, are not shown.

EARMARKS

Wrentham received $602,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$602,000	**$602,000**	**$602,000**	**Not a member**
$48.99 per resident (153rd of 351)	$48.99 per resident (176th of 351)	$48.99 per resident (179th of 351)	35 municipalities had none

Placed in the town: 16 clauses in ten of ten budgets; the most recent in FY2026. Every one names Wrentham directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2023	$127,000	"support the implementation of full-day kindergarten in the town of Wrentham"	Enacted names the town
FY2019	$100,000	"the town of Wrentham to be allocated equally amongst the King Philip Regional, Norfolk, Plainville and Wrentham school districts"	Enacted names the town
FY2026	$50,000	"furniture, layout and technology upgrades at the Fiske public library in the town of Wrentham"	Enacted names the town
FY2025	$50,000	"upgrades to the lighting systems at the Rice Recreational Complex in the town of Wrentham"	Enacted names the town
FY2018	$50,000	"the town of Wrentham for a water service project"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Wrentham received 85% of its proportional share of competitive grant awards.

Local road miles **67.3** 197th of 351 · 5.5 per 1,000 residents (212th of 351)	Town-owned bridges, replacement cost **$0** scored exposure $0 · none in poor condition	Road-stream crossings **89** 142nd of 351 · culverts and small crossings	Town-owned hazard dams **1** high or significant hazard
Land area **21.7 sq mi** 8% state-owned	Seasonal homes **0%** share of housing units	Peak service population **12,297** residents plus seasonal	Core infrastructure index **0.31** roads, culverts, dams, coast, flood, energy

Burden index 0.85; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **1,666 acres** 12.0% of land area · FY2026	State-owned land PILOT, FY2026 **$94,000** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$56.48** statewide $117 · FY2026	New growth per resident **$38,394** FY2017–2025 · 63rd of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 10.0% of Wrentham's general-fund spending in FY2025, down from 17.3% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **17.3%** $5.4M of $31M · median town 14.1%	FY2016 **12.9%** $5M of $38.9M · median town 12.2%	FY2025 **10.0%** $5.4M of $54.1M · median town 11.5%	Net of state charges, FY2025 **7.5%** FY2010: 15.0% · median town 10.0%

Wrentham's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $3.4 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Wrentham's state aid did not keep pace with either price measure: FY2025 aid was 35.1% below its FY2006 aid grown by Boston-area consumer prices and 42.3% below grown by the government price index.

Gross state aid went from $5.4 million in FY2006 to $5.4 million in FY2025, +0.6% in dollars. Flag: in FY2010, $293,000 of Wrentham's gross aid was in receipts the itemized cherry sheet does not show, consistent with school-building reimbursements that ended by FY2024 (not verified line by line). Part of the change since FY2006 may be that phase-out.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+28.0%** $3.4M to $4.4M · all towns +54.0%	All fixed costs, FY2016–25 **+51.3%** $5.3M to $7.9M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **4 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Wrentham's health insurance would have been $4.30 million in FY2025; it was $4.41 million, $107,000 above the path. Its fixed costs would have been $6.56 million in FY2025; it was $7.94 million, $1.39 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Wrentham came to $502,000, 52.1% of the $964,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance

Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$502,000	52.1%	28.2%
Placed in the town	$502,000	52.1%	42.3%
Everything placed	$502,000	52.1%	45.2%

SCHOOLS

Wrentham's required school contribution is 3.0% of median household income, 81st highest of 351.

Chapter 70 aid, FY2026 **$7.7M** to the town's district	Required local contribution **$19.7M** FY2026
Share of household income **3.0%** 81st of 351 (1 = highest)	Real aid per pupil, FY2017–26 **–11%** after inflation

Wrentham runs its own district for some grades and belongs to King Philip, Tri County and Norfolk County for others; Wrentham accounts for 39%, 8% and 4% of their foundation budgets, in that order.

EXPECTED AND ACTUAL

Wrentham received $4.2 million in earmarks placed in the town and competitive grants over ten years, 17% more than the $3.6 million its size, need and institutions predict.

PEERS

Wrentham ranks 7th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Wrentham this town	**39**	**$9,318**	**$289**	**$48.99**	**0.85**	**3.0%**
Kingston peer	44	$10,470	$762	$41.35	2.68	3.0%
Hull peer	42	$8,515	$509	$61.46	1.65	1.6%
Sutton peer	44	$10,223	$840	$107	1.91	3.1%
Westminster peer · best in class of 30	48	$12,585	$85.79	$1,114	0.30	2.9%
Foxborough peer	34	$8,398	$121	$70.60	1.08	3.7%
Rehoboth lowest in class of 30	33	$7,696	$69.78	$12.80	0.22	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

STATE MONEY CTHRU statewide spending, Office of the Comptroller; American Community Survey 2020–2024, U.S. Census Bureau

EARMARKS General Appropriations Acts, FY2017–FY2026, enacted text

WHAT THE TOWN CARRIES MassDOT Chapter 90 apportionment and Road Inventory; FHWA National Bridge Inventory, 2025; MassDOT Bridges layer (GeoDOT); North Atlantic Aquatic Connectivity Collaborative, road-stream crossings; DCR Office of Dam Safety inventory, via MassGIS; American Community Survey housing tables, U.S. Census Bureau; State grant award lists (Community One Stop, MVP, Green Communities and others); DLS Databank, state-owned land eligible for PILOT; DLS Databank, new growth

COSTS AND THE 2½% LIMIT DLS Databank, Schedule A general fund expenditures and revenues; DLS Databank, health insurance expenditures; DLS Databank, revenue by source (state aid); DLS Databank, cherry sheet receipts and charges by program; DLS Databank, new growth and levy limits; Boston-area CPI-U (BLS) and state-local price index (BEA), via FRED

SCHOOLS DESE Chapter 70 aid and required contribution; Bureau of Labor Statistics CPI-U

EXPECTED AND ACTUAL Division of Local Services, equalized valuation; CTHRU statewide spending; General Appropriations Acts, enacted text

BARNSTABLE COUNTY

Yarmouth

Town · Barnstable County · 25,224 residents (ACS 2020–24)

Data through FY2026; built October 19, 2026.

STATE HOUSE

1st Barnstable · Christopher Richard Flanagan 72% of residents

2nd Barnstable · Kip A. Diggs 28% of residents

Yarmouth is split among two House districts. Shares are of 2020 residents.

STATE SENATE

Cape and Islands · Julian Cyr

SCHOOL DISTRICTS

Dennis-Yarmouth Regional School District, shared with Dennis

Cape Cod Regional Vocational Technical School District, vocational, shared with Barnstable, Brewster, Chatham, Dennis, Eastham, Harwich, Mashpee, Orleans and three others

REGIONAL PLANNING AGENCY

Cape Cod Commission

FAIRNESS INDEX

Yarmouth scores 27 on the Fairness Index for all state aid and 44 for discretionary money. Fifty is a fair share.

ALL STATE AID

27 / 100

335th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
25	25	31	28

Rank under other weightings: 303rd to 343rd.

Stable low: below 45 under every weighting

Yarmouth received less than its share of state aid on all four measures; its blended score of 27 stays between 26 and 28 under every weighting tested.

DISCRETIONARY MONEY ONLY

44 / 100

207th of 351 (1 = most above its share)

Equal	Need	Burden	Effort
44	44	40	47

Rank under other weightings: 201st to 217th.

Stable low: below 45 under every weighting

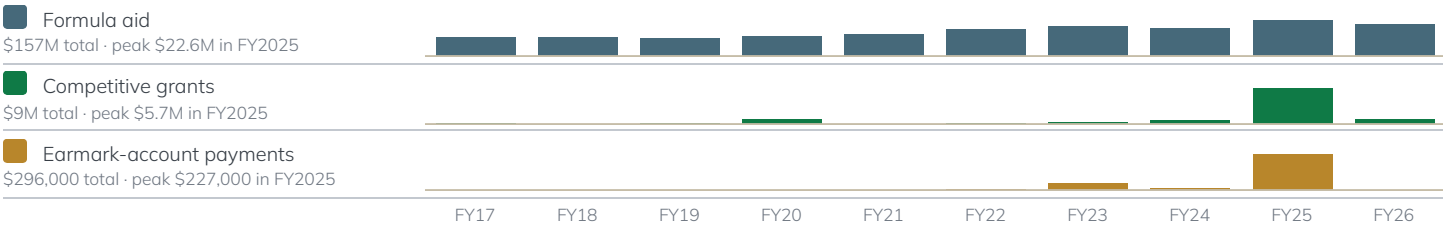
Yarmouth received less than its share of discretionary money on all four measures; its blended score of 44 stays between 43 and 45 under every weighting tested.

STATE MONEY, FY2017–FY2026

Yarmouth's town government and school districts received $157 million in formula aid and $9 million in competitive grants over ten years.

Formula aid	Competitive grants	Earmark-account payments
$157M	$9M	$296,000
$6,216 per resident (330th of 351) · gross	$356 per resident (186th of 351)	$11.74 per resident (249th of 351)

Competitive grants to Yarmouth peaked in FY2025 at $5.7 million, 63% of the ten-year total.



Each class has its own scale. Bars show dollars paid in each fiscal year.

Formula aid is gross; competitive grants and earmark-account payments are as paid. Other classes, $63 million, are not shown.

EARMARKS

Yarmouth received $218,000 in local earmarks in ten enacted budgets on all three measures.

Names the town	Placed in the town	Everything placed	Losers Club
$218,000	$218,000	$218,000	Not a member
$8.62 per resident (300th of 351)	$8.62 per resident (308th of 351)	$8.62 per resident (309th of 351)	35 municipalities had none

Placed in the town: eight clauses in seven of ten budgets; the most recent in FY2026. Every one names Yarmouth directly.

Largest items placed in the town, FY2017–FY2026 (the town's share where a clause names several towns)

Year	Amount	Budget text (excerpt)	Stage
FY2025	$45,000	"a training facility feasibility study for the Yarmouth police department"	Enacted names the town
FY2024	$35,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to…"	Enacted names the town
FY2026	$25,000 (split two ways)	"Friends of Bass River, Inc. for the purchase and installation of passive filtration culvert inserts and to address the removal of Chesapeake bay…"	Enacted names the town
FY2023	$25,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to…"	Enacted names the town
FY2022	$25,000 (split two ways)	"Calmer Choice, Inc. for the development and support of anti-addiction and mental health programs in school districts including, but not limited to…"	Enacted names the town

WHAT THE TOWN CARRIES

Measured against what it maintains, Yarmouth received 82% of its proportional share of competitive grant awards.

Local road miles **151.1** 33rd of 351 · 6.0 per 1,000 residents (191st of 351)	Town-owned bridges, replacement cost **$1.6M** scored exposure $316,000 · none in poor condition	Road-stream crossings **65** 208th of 351 · culverts and small crossings	Town-owned hazard dams **0** high or significant hazard
Land area **24.2 sq mi** 0% state-owned	Seasonal homes **29%** share of housing units	Peak service population **35,699** residents plus seasonal	Core infrastructure index **0.55** roads, culverts, dams, coast, flood, energy

Burden index 0.82; state median 0.91; 1.0 is proportional. Ranks run from 1, the most among 351.

STATE LAND AND GROWTH

State land eligible for PILOT **56 acres** 0.4% of land area · FY2026	State-owned land PILOT, FY2026 **$2,195** payment in lieu of taxes, cherry sheet	PILOT per eligible acre **$38.92** statewide $117 · FY2026	New growth per resident **$15,329** FY2017–2025 · 247th of 351 · median town $20,524

COSTS AND THE 2½% LIMIT

State aid covered 1.8% of Yarmouth's general-fund spending in FY2025, down from 3.4% in FY2006.

STATE AID AS A SHARE OF GENERAL-FUND SPENDING

FY2006 **3.4%** $1.8M of $51.8M · median town 14.1%	FY2016 **2.1%** $1.5M of $70.7M · median town 12.2%	FY2025 **1.8%** $1.9M of $103M · median town 11.5%	Net of state charges, FY2025 **0.8%** FY2010: 1.5% · median town 10.0%

Yarmouth's own cherry sheet carries no Chapter 70 for pupils in its regional district; the state paid $10.7 million in FY2025 Chapter 70 to the district on its behalf, outside these figures, while the town's assessment to the district sits in its spending. For a regional member the share understates state support for school costs.

Yarmouth's state aid did not keep pace with either price measure: FY2025 aid was 30.6% below its FY2006 aid grown by Boston-area consumer prices and 38.3% below grown by the government price index.

Gross state aid went from $1.8 million in FY2006 to $1.9 million in FY2025, +7.6% in dollars.

FIXED COSTS AGAINST THE 2½% LIMIT, FY2016–FY2025

Health insurance, FY2016–25 **+43.0%** $2.1M to $3M · all towns +54.0%	All fixed costs, FY2016–25 **+57.4%** $6.1M to $9.6M · all towns +53.0%	Years squeezed **5 of 9** fixed costs grew faster than allowed levy growth	Health insurance **5 of 9** years it grew faster than allowed levy growth

Nine years at 2.5% add 24.9%. Grown that way from FY2016, Yarmouth's health insurance would have been $2.59 million in FY2025; it was $2.97 million, $377,000 above the path. Its fixed costs would have been $7.63 million in FY2025; it was $9.61 million, $1.98 million above the path.

LOCAL EARMARKS AGAINST THE HEALTH-INSURANCE INCREASE

Over the nine budgets, earmarks naming Yarmouth came to $192,000, 21.5% of the $893,000 rise in its health insurance.

Local earmarks FY2017–FY2025 (enacted, nine budgets) against the FY2016–FY2025 rise in health insurance			
Measure	Earmarks	Share of the increase	All towns, pooled
Names the town	$192,000	21.5%	28.2%
Placed in the town	$192,000	21.5%	42.3%
Everything placed	$192,000	21.5%	45.2%

SCHOOLS

Yarmouth's required school contribution is 3.0% of median household income, 67th highest of 351.

Chapter 70 aid, FY2026 **$11.8M** attributed to the town	Required local contribution **$31.3M** FY2026
Share of household income **3.0%** 67th of 351 (1 = highest)	Real aid per pupil, FY2017–26 **+59%** after inflation

Yarmouth has no school district of its own. Its pupils attend Dennis-Yarmouth and Cape Cod; Yarmouth accounts for 70% and 21% of their foundation budgets, in that order. Aid and contribution are DESE's attribution to the town. How a region splits its assessment among members is set by its own agreement and is not published statewide.

EXPECTED AND ACTUAL

Yarmouth received $11.2 million in earmarks placed in the town and competitive grants over ten years, 82% of the $13.6 million its size, need and institutions predict.

PEERS

Yarmouth ranks 11th of 11 on earmark dollars placed in the town per resident among itself and its ten nearest peers.

Municipality	Fairness Index	Formula aid per resident	Competitive per resident	Earmarks placed in the town, per resident (enacted)	Burden index	School contribution, share of income
Yarmouth this town	**27**	**$6,216**	**$356**	**$8.62**	**0.82**	**3.0%**
Norwood peer	34	$7,831	$166	$22.99	0.33	3.0%
Northampton peer	28	$6,641	$603	$73.53	1.28	3.1%
Beverly peer	27	$6,643	$218	$69.85	0.97	3.1%
Westport peer	30	$6,951	$107	$52.17	0.45	3.2%
Wareham peer	47	$10,699	$733	$18.13	0.30	2.9%
Chatham best in class of 30	23	$4,225	$743	$246	0.70	1.8%
Fairhaven lowest in class of 30	47	$10,747	$508	$12.58	0.36	2.8%

SOURCES

Every figure traces to a public record.

FAIRNESS INDEX CTHRU statewide spending, Office of the Comptroller; General Appropriations Acts, enacted text; Division of Local Services, assessed values and tax rates; DESE Chapter 70 aid by town (gross); Division of Local Services cherry sheets; American Community Survey 2020–2024, U.S. Census Bureau

REPRESENTATION Massachusetts Legislature, members and districts; District lines: Acts of 2021, chapters 82 and 83; Census 2020 block populations; DESE school district profiles and enrollment; MassGIS regional planning agencies; Massachusetts Department of Revenue, Division of Local Services

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