



Presentation to Stoneham Override Committee

State Sen. Jason Lewis
State Rep. Michael S.
Day





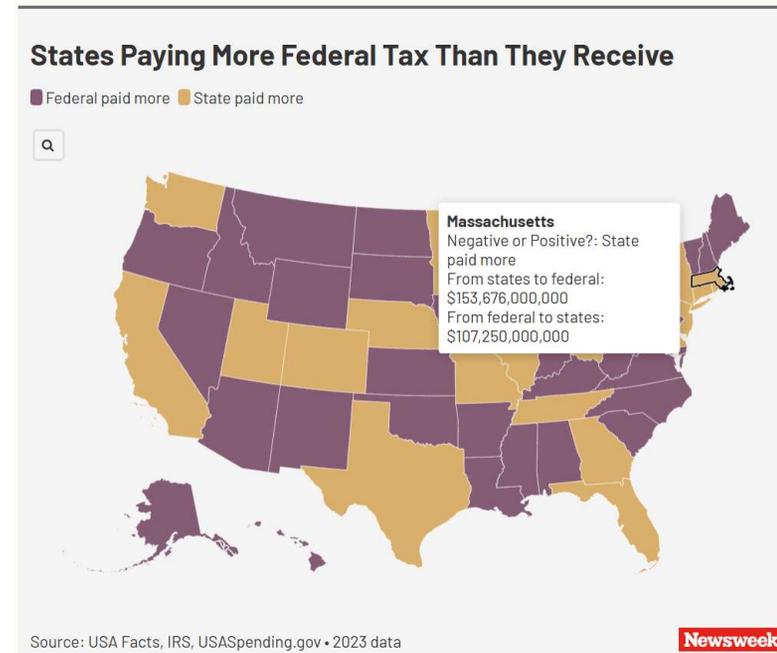
Federal Landscape



Federal Outlook | MA

Contribution to Federal Gov

- Only eight other states are considered donor states, where states pay more federal taxes than they receive back from the feds.
- MA tax payers pay the Federal Gov- \$153,676,000,000
- Federal Gov gives to MA programs about-\$107,250,000,0000
- Federal money made up about 32% of our state budget last year.





Federal Outlook | From the Headlines



The Legislature's work on the budget evolved alongside growing uncertainty about future economic conditions, as federal policy actions and spending decisions loom large.
-Massachusetts Municipal Association

Trump federal funding cuts make for a 'challenging' budget cycle, state officials say

By Matt Stout Globe Staff, Updated March 6, 2025, 5:07 p.m.



Facing economic uncertainty, Mass. lawmakers say they have agreement on state budget

By Samantha J. Gross and Matt Stout Globe Staff, Updated June 27, 2025, 2:26 p.m.



Federal funding typically accounts for about a quarter of the Commonwealth's budget, a large portion of which supports MassHealth. The Governor's FY 2026 budget proposal comes at a time of great uncertainty around federal funding and potential funding cuts. If federal budget cuts materialize, the state will have to consider other funding sources to meet the needs of the Commonwealth.
-Massachusetts Budget and Policy

Massachusetts bracing for "all hands" response to federal funds threat

The Only Paper in Boston



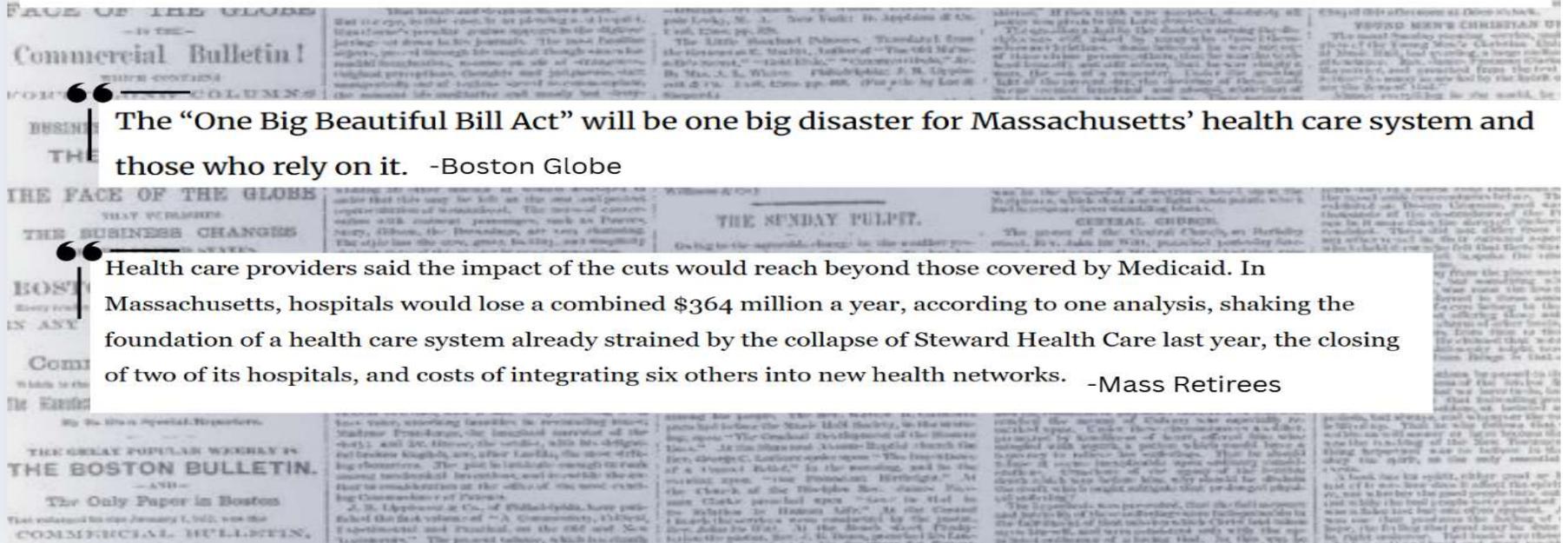
Federal Outlook | Recent Legislation

The Boston Daily Globe.

“About 250,000 people in Massachusetts would lose coverage under a version of the legislation passed by the House, Governor Maura Healey estimated. A Senate bill that passed with a tie-breaking vote by Vice President JD Vance on Tuesday appears more draconian, state officials said. The legislation now goes back to the House for a final vote. -Boston Globe

“The “One Big Beautiful Bill Act” will be one big disaster for Massachusetts’ health care system and those who rely on it. -Boston Globe

“Health care providers said the impact of the cuts would reach beyond those covered by Medicaid. In Massachusetts, hospitals would lose a combined \$364 million a year, according to one analysis, shaking the foundation of a health care system already strained by the collapse of Steward Health Care last year, the closing of two of its hospitals, and costs of integrating six others into new health networks. -Mass Retirees





State Perspective | Budget

MASSACHUSETTS STATE BUDGET PROCESS TIMELINE





Components of Local Support |

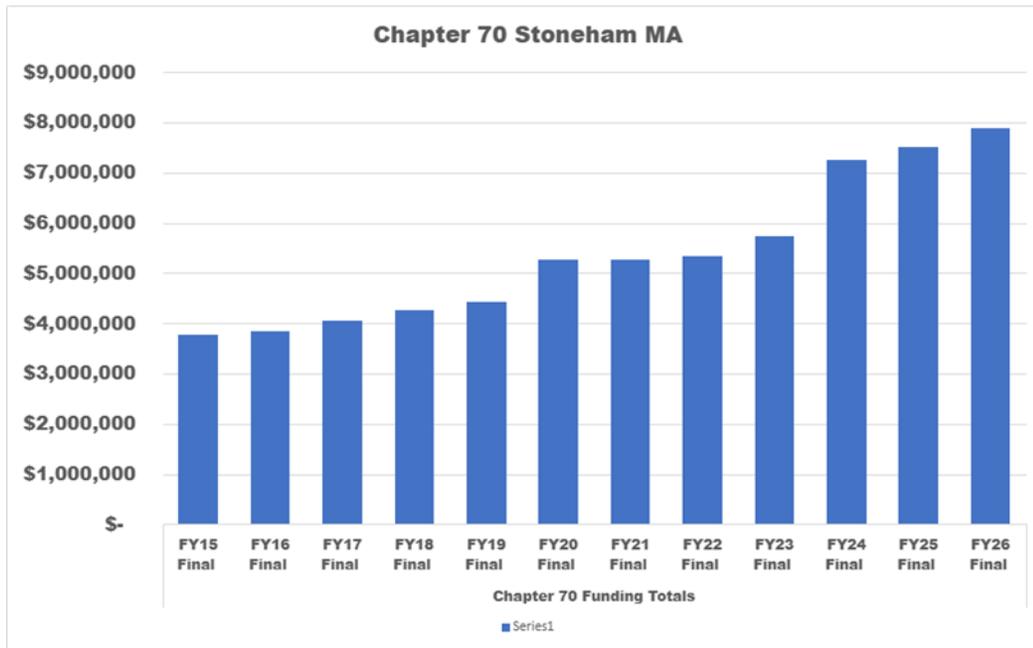
MA Contribution

- **Education**
- **Unrestricted General Government Aid [Local Aid]**
- **Infrastructure Maintenance and Repair**
- **Grant Programs**
- **Direct project appropriations**



State Perspective | Education: Chapter 70 Funding

| Chapter 70 Funding Totals | | | | | | | | | | | |
|---------------------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
| FY15 Final | FY16 Final | FY17 Final | FY18 Final | FY19 Final | FY20 Final | FY21 Final | FY22 Final | FY23 Final | FY24 Final | FY25 Final | FY26 Final |
| \$3,779,409 | \$3,838,859 | \$4,059,406 | \$4,269,807 | \$4,421,709 | \$5,266,351 | \$5,266,351 | \$5,337,631 | \$5,737,555 | \$7,259,629 | \$7,515,053 | \$7,891,703 |



Approximately -
109% increase
over past 10
years

EDUCATION | Student Opportunity Act



- Passed in 2019 to update Chapter 70 for the first time in decades
- Adds \$1.5 billion in new funding (phased in over 7 years, extended due to COVID delays) to better support students and districts with the highest needs.
- Prioritizes equity by increasing aid for low-income students, English learners and special education.
- Requires districts to develop plans showing how new funds will close achievement gaps and expand opportunities.
- Expands charter school reimbursement funding and increases state aid for school transportation in rural districts.



Education | Charter Schools

- Currently we have 206 students attending for the FY26 school year.
- Data below represents the breakdown of comparing towns enrollment in Charters and where our students are going (based on data from last year).

| DISTRICT | Enrollment |
|------------|------------|
| MALDEN | 611.5 |
| MEDFORD | 367.5 |
| READING | 3.0 |
| MELROSE | 255 |
| STONEHAM | 172.5 |
| WINCHESTER | 2.0 |
| WOBURN | 52.3 |

| School | School Location | Sending District | Student's Sent |
|--------------------------|-----------------|------------------|----------------|
| BENJAMIN BANNEKER | CAMBRIDGE | STONEHAM | 2 |
| MYSTIC VALLEY REGIONAL | MALDEN | STONEHAM | 177 |
| PROSPECT HILL ACADEMY | CAMBRIDGE | STONEHAM | 2 |
| PROSPECT HILL ACADEMY | SOMERVILLE | STONEHAM | 5 |
| PIONEER CS OF SCIENCE | EVERETT | STONEHAM | 4 |
| PIONEER CS OF SCIENCE II | SAUGUS | STONEHAM | 2 |



Education | Stoneham Students in Charter Schools

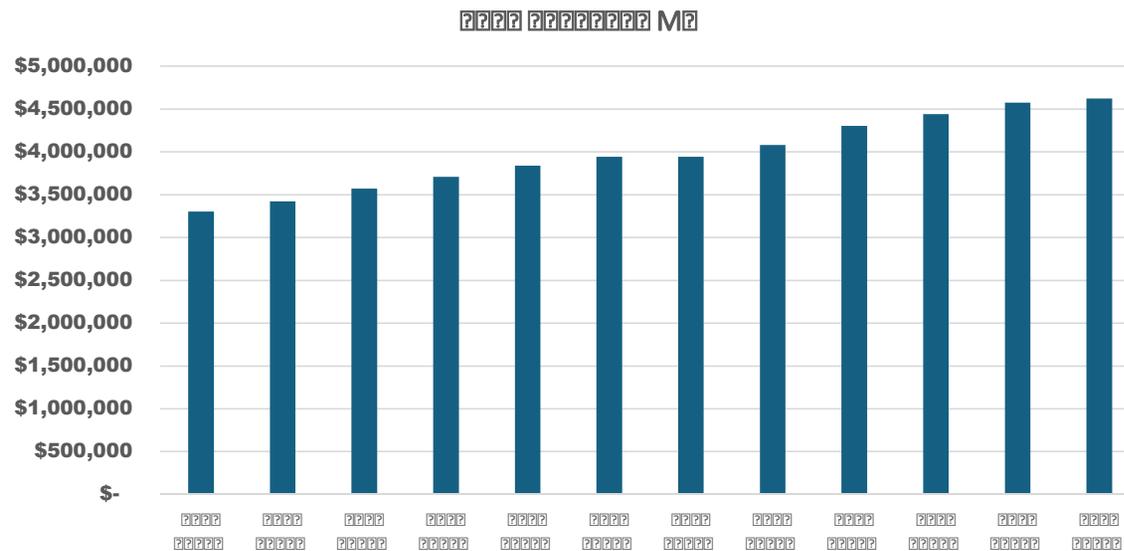
| Charter School Sending Tuition | | | | | | | |
|--------------------------------|----------|------------|-----------|---------|----------|-----------|---------|
| Year | Stoneham | Winchester | Woburn | Medford | Malden | Reading | Melrose |
| FY25 | \$3.82M | \$0 | \$1.37M | \$7.1M | \$10.83M | \$127,407 | \$4.28M |
| FY24 | \$3.41M | \$68,689 | \$1.25M | \$8.64M | \$10.67M | \$68,639 | \$3.84M |
| FY23 | \$3.09M | \$101,271 | \$881,226 | \$8.4M | \$10.54M | \$32,835 | \$3.93M |
| FY22 | \$2.33M | \$81,954 | \$871,086 | \$8.78M | \$10.58M | \$30,874 | \$3.81M |
| FY21 | \$1.82M | \$30,452 | \$713,037 | \$8.55M | \$10.45M | \$31,100 | \$3.36M |

| Net Charter School Loss | | | | | | | |
|-------------------------|----------|------------|-----------|---------|---------|----------|---------|
| Year | Stoneham | Winchester | Woburn | Medford | Malden | Reading | Melrose |
| FY25 | \$2.81M | (\$4,962) | \$1.03M | \$6.98M | \$9.02M | \$40,461 | \$3.20M |
| FY24 | \$2.47M | \$53,520 | \$867,956 | \$7.05M | \$9.14M | \$36,546 | \$3.10M |
| FY23 | \$2.05M | \$37,127 | \$663,592 | \$6.83M | \$9.16M | \$21,681 | \$2.98M |
| FY22 | \$1.76M | \$38,110 | \$698,608 | \$7.03M | \$9.04M | \$28,998 | \$3.11M |
| FY21 | \$1.51M | \$17,626 | \$484,525 | \$6.60M | \$8.64M | \$19,518 | \$2.67M |



State Perspective | UGGA

| Unrestricted General Government Aid | | | | | | | | | | | |
|-------------------------------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| FY15 Final | FY16 Final | FY17 Final | FY18 Final | FY19 Final | FY20 Final | FY21 Final | FY22 Final | FY23 Final | FY24 Final | FY25 Final | FY26 Final |
| \$ 3,307,067 | 3,426,121 | 3,573,444 | 3,712,808 | 3,842,756 | 3,946,510 | 3,946,510 | 4,084,638 | 4,305,208 | 4,442,975 | 4,576,264 | 4,626,603 |



**Approximately-
40% increase
over past ten
years.**

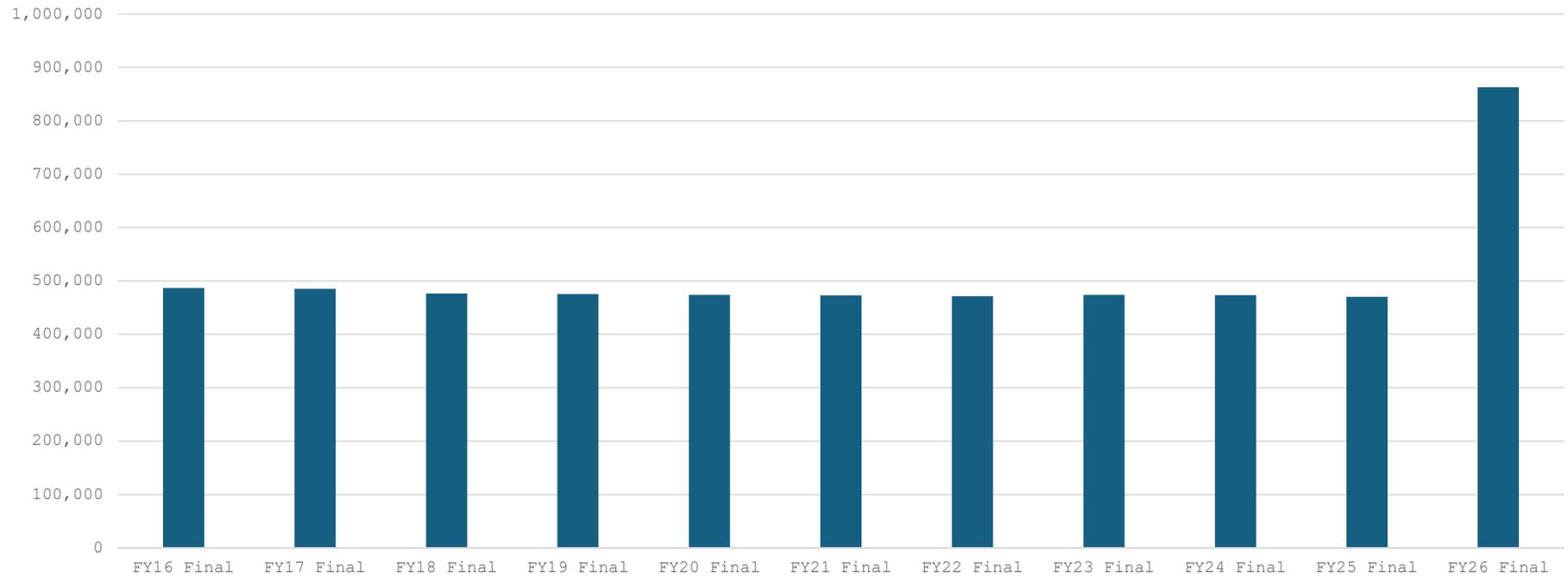
State Perspective | Chapter



90

| Chapter 90 | | | | | | | | | | |
|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|
| FY16 Final | FY17 Final | FY18 Final | FY19 Final | FY20 Final | FY21 Final | FY22 Final | FY23 Final | FY24 Final | FY25 Final | FY26 Final |
| 486,963 | 485,513 | 476,787 | 475,948 | 474,420 | 473,284 | 471,465 | 474,064 | 473,596 | 470,712 | 863,214 |

Chapter 90 Funding Stoneham MA





State Perspective | Fair Share

Amendment

- The amendment adds a 4% surtax to annual taxable income above \$1 million. It was passed in 2022 through the Legislative bill originally led by Senator Lewis.
- The \$1 million income threshold is adjusted annually for inflation to ensure the tax continues to apply only to the state's highest earners.
- Revenue is currently dedicated to education and transportation.
- Yearly totals are subject to fluctuation.

- FY24- approx. \$1.5 billion
- FY25-approx. \$2.2 billion

How this funding has been appropriated:

- \$716 million for transportation
- \$535 million for improvements and infrastructure upgrades across the MBTA system
- \$593.5 million for education at every level
- \$248 million for special education costs, including Circuit Breaker reimbursements to local school districts.

Fair Share Earmarks

- \$150,000 for school transportation
- \$100,000 for local transportation infrastructure

Free School Meals

- Stoneham
 - FY24- \$492,139.23
 - FY25- \$617,806

State Perspective | Fair Share Amendment Community College



State Financial Aid Disbursed to Stoneham Residents Enrolled in MA Public Higher Education

| | FY22 | | | FY23 | | | FY24 | | |
|--------------------|------------|------------------|----------------|------------|------------------|----------------|------------|------------------|----------------|
| | Students | Amount | Average | Students | Amount | Average | Students | Amount | Average |
| Community Colleges | 40 | \$39,469 | \$987 | \$34 | \$51,887 | \$1,526 | 56 | \$170,154 | \$3,038 |
| State Universities | 38 | \$126,413 | \$3,327 | \$42 | \$153,610 | \$3,657 | 39 | \$236,475 | \$6,063 |
| UMass | 68 | \$158,230 | \$2,327 | \$67 | \$207,210 | \$3,093 | 84 | \$391,612 | \$4,662 |
| Total | 146 | \$324,112 | \$2,220 | 143 | \$412,707 | \$2,886 | 179 | \$798,241 | \$4,459 |

State Financial Aid Disbursed to Winchester Residents Enrolled in MA Public Higher Education

| | FY22 | | | FY23 | | | FY24 | | |
|--------------------|-----------|------------------|----------------|-----------|------------------|----------------|-----------|------------------|----------------|
| | Students | Amount | Average | Students | Amount | Average | Students | Amount | Average |
| Community Colleges | 19 | \$20,975 | \$1,104 | 19 | \$16,025 | \$843 | 23 | \$46,164 | \$2,007 |
| State Universities | 5 | \$18,500 | \$3,700 | 6 | \$30,824 | \$5,137 | 11 | \$72,886 | \$6,626 |
| UMass | 48 | \$115,177 | \$2,400 | 37 | \$119,174 | \$3,221 | 52 | \$286,938 | \$5,518 |
| Total | 72 | \$154,652 | \$2,148 | 62 | \$166,023 | \$2,678 | 86 | \$405,988 | \$4,721 |

* FY 25 data will not be available until late October

State Perspective | Earmarks



FY26

- \$200,000 tax assistance to Seniors
- \$100,000 for transportation and infrastructure
- \$50,000 to the Stoneham Public Library

FY25

- 150,000 for the Stoneham public schools
- \$50,000 for technology in the Stoneham public schools
- \$50,000 for extra-curricular programs

FY24

- \$100,000 for Stoneham 300 celebrations

FY23

- \$80,000 for the purchase of a municipal document management system
- \$200,000 for a road sweeping vehicle
- \$95,000 for renovations to the Capen street playground

FY22

- \$100,000 for improvements to the Stoneham Arena

FY21

- \$50,000 for Stoneham Police Department

FY20

- \$100,000 for the planning and improvements of trails in the Fells
- \$50,000 for accessibility improvements around town
- \$50,000 for repairs and upgrades to the roof of the Stoneham Senior Center

FY19

- \$50,000 for the Stoneham Public Library
- \$75,000 for fire equipment for the Fire Department

FY18

- \$25,000 to install wayfinding signage around town

FY17

- \$9,000 for the organ in Town Hall
- \$15,000 for the Stoneham Fire Department

FY16

- \$50,000 to the Substance Abuse Coalition



State Perspective | ARPA

Earmarks

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- \$125,000 for redesign and revitalization of Stoneham's ?????????? d????r???

State Perspective | Grants

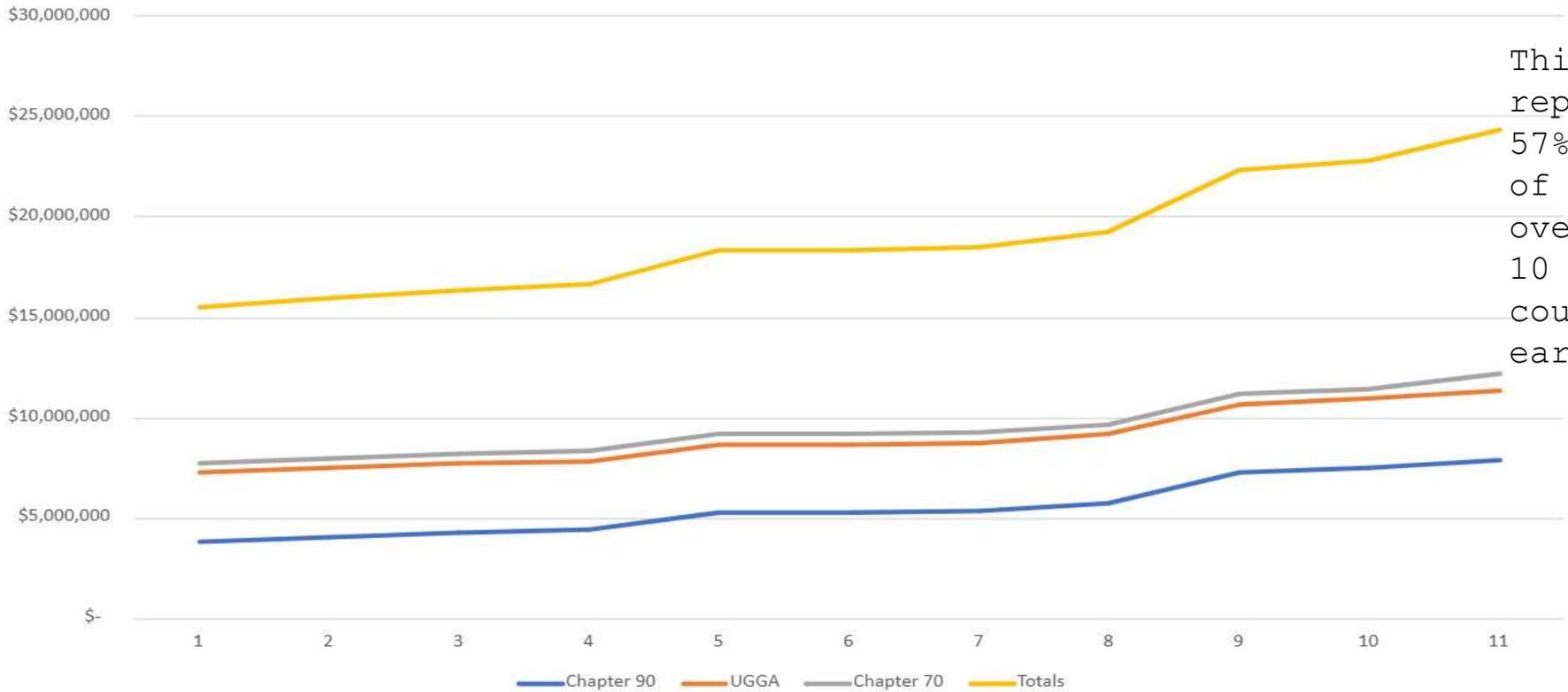


- Downtown Revitalization MassWorks Grant
- Community Planning grant to update the Housing Production Plan (announced October 2024)
- Two-time Housing Choice Community Designation
- Accelerating Climate Resilience Grant for the Sustainable Landscape Project with the towns of Arlington and Winchester
- Massachusetts Housing Partnership Technical Assistance with Chapter 40A 3A
- Department of Housing & Community Development funding for a Local Rapid Recovery Plan
- Executive Office of Energy and Environmental Affairs Municipal Vulnerability and Preparedness Action Grant to complete the Stoneham High School Wetlands Restoration Project
- Massachusetts Historical Commission Survey & Planning Grant for a Community-Wide Preservation Plan
- Massachusetts Office of Travel & Tourism Grant with the Stoneham Chamber of Commerce on the town's branding project
- Executive Office of Energy and Environmental Affairs Municipal Vulnerability and Preparedness Planning Grant to create its Municipal Vulnerability Preparedness and Hazard Mitigation Plans
- MA Department of Transportation Shared Streets funding for the Post Office Crossing and Tri-Community Greenway crossing improvements at Central Street and William Street
- CDBG (Community Development Block Grant) Program Microenterprise Grant from Department of Housing & Community Development
- PARC (Parkland Acquisition and Renovation for Communities) Grant from the Division of Conservation Services
- Green Communities Designation from the Green Communities Division at the Massachusetts Department of Energy Resources (DOER)
- Green Communities Competitive Grant from DOER
- Complete Streets Tier 3 Funding
- District Local Technical Assistance for the Stoneham Square Strategic Action Plan

State Perspective | Total Funding for Stoneham



Sum of UGGA, Chapter 90 and Chapter 70



This represents a 57% increase of state aid over the past 10 years, not counting earmarks.