The Monty Tech assessment — the school bill nobody in Lunenburg votes on

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Written by the Lunenburg Budget Project. Not an official town or district document. Every figure here is recomputed from `sources/data/lunenburg.db` *and from the documents named below by* `scripts/verify_monty_tech.py`*, which fails the build if one drifts.*

What this establishes

1. Lunenburg paid Montachusett Regional Vocational Technical $1,334,521 in FY2026, and 95.2% of that was a figure the state calculated. The Town's own accounting system carries it in full: department 310, account `0100-3-310-9500-00-0-00-2-532000`, appropriated $1,334,521 and expended $1,334,521 at period 12. The district's own budget book breaks the same figure into the parts it assesses in: a required minimum contribution of **$1,270,711**, a transportation and other operating assessment of **$47,577**, and a capital assessment of **$16,233**. Those three sum to the total exactly. Only the last two — **$63,810**, 4.8% of the bill — are anything a member town negotiates.

2. The required minimum contribution is not apportioned among member towns by their enrolment. It is Chapter 70's local contribution, computed from Lunenburg's property value and resident income, then split between the town's two school districts in exact proportion to each district's share of the town's foundation budget. DESE publishes both halves, and the district reprinted DESE's own apportionment sheet in its FY2027 budget presentation: FY2026 foundation enrolment 1,603 for Lunenburg Public Schools and 101 for Montachusett, foundation budgets $22,073,946 and $2,103,516, "each district's share of municipality's combined FY26 foundation" **91.30%** and **8.70%**, required contribution $13,334,631 and **$1,270,711** out of a town-wide $14,605,342.

3. So a Lunenburg child moving to Monty Tech does not raise the town's obligation. It moves part of it from one line to the other. The town's total required contribution is the lesser of its combined effort yield — property wealth and resident income — and 82.5% of its foundation budget. In all twenty years DESE publishes, the wealth figure is the lower one and therefore the binding one, so enrolment never enters the town-wide total at all. What enrolment changes is the split. Between FY2014 and FY2026, Monty Tech's share of that obligation rose from **7.04%** to **8.70%**, and its dollar share from **$714,845** to **$1,270,711** — **+77.8%** — while the town-wide obligation rose 43.9% and the Lunenburg school district's share of it rose 41.4%.

4. A Monty Tech pupil carries about half again the foundation budget of a Lunenburg one, which is why the money share runs well ahead of the head share. In FY2026 the state's foundation budget is **$20,827** for each Lunenburg pupil at Monty Tech and **$13,770** for each one in Lunenburg's own schools — a ratio of **1.51**. That is why Monty Tech is **5.93%** of the town's foundation enrolment and **8.70%** of its foundation budget and of its bill.

5. The town's own five-year forecast of this line missed FY2026 by $329,057. A Select Board packet in January 2021 projected the assessment forward at 2.5% a year, reaching **$1,005,464.38** in FY2026. The actual figure is **$1,334,521 — 32.7%** higher. The line was being forecast as though it were an ordinary cost escalator; the thing driving it is a state contribution formula, which over the same five years compounded at **9.3%** a year.

6. What the town is billed is not what the district spends, and the gap is Chapter 70. Monty Tech's FY2026 budget is **$34,641,344**. Chapter 70 aid paid directly to the district covers **54.2%** of it; assessments on all eighteen member towns together cover **38.0%**. Lunenburg's $1,334,521 is **3.85%** of the district's budget while Lunenburg is **6.79%** of its foundation enrolment. Rule 11 exactly: the bill and the cost are different quantities, and this archive holds the bill.

7. Monty Tech is the larger of the two routes out of Lunenburg's own schools, and it is not a departure. In FY2026, 97 Lunenburg residents attend Monty Tech against 58 under school choice and 22 at charter schools. They are reported by DESE as `Resident/Member` — resident members of a district Lunenburg belongs to. No Lunenburg vote admits or refuses any of them, and the count has risen in nine of the twelve years DESE publishes, from 70 in FY2014 to 97, with the longest unbroken run being the five years FY2020 to FY2024.

8. Eleven of the twelve figures the annual town reports give for this line fail the extractor's own reconciliation, and they should be read as candidates. They are published below with their status because a series drawn from them is the only long view that exists. What can be said for their shape: every one sits above the independently derived state minimum for its year, by between 3.7% and 10.1% — except FY2022, which sits 0.5% above and is the one year the Town Manager reported an assessment reduced mid-year.

The assessment, year by year

Three different quantities appear here and the table never merges them: what the district **assessed**, what the town **appropriated**, and what the town's accounting system says it **paid**.

FY	REQUIRED MINIMUM	TRANSPORT & OPERATING	CAPITAL	TOTAL ASSESSED	ABOVE THE MINIMUM	SOURCE
2023	$1,012,282 *	$24,131 *	$17,964 *	**$1,054,376**	$42,094	district's FY2024 book (total); Finance Committee minutes, 23 March 2022 (parts)
2024	$1,127,113	$34,700	$19,577	**$1,181,390**	$54,277	*FY24 Monty Tech Budget for Public Hearing*, line 402
2025	$1,172,254 †	not stated	not stated	**$1,225,646** ‡	$53,392	Town's FY2027 budget book, line 185
2026	$1,270,711	$47,577	$16,233	**$1,334,521**	$63,810	*FY27 Monty Tech Budget Presentation*, line 98
2027	$1,378,183	$74,196	$0	**$1,452,379**	$74,196	*FY27 Monty Tech Budget Presentation*, line 98

* The FY2023 parts are from prose in Finance Committee minutes, not from a table, and they sum to $1,054,377 — one dollar above the total the district prints. † Derived from DESE's workbook, not stated by the district; FY2025 is the one year in this range with no budget book in the archive. ‡ The Town's appropriation, not a district assessment figure.

Three places two documents state the same year, and what they say. FY2024: the district assessed $1,181,390 and the Town's budget book records $1,181,390.18 expended — eighteen cents apart. FY2026: the district's book, the Town's budget book and the Town's MUNIS ledger all say $1,334,521, to the cent. FY2027: the district says $1,452,379 and the Town's budget book says **$1,452,426** in all three of its scenarios — **$47** apart, with neither document acknowledging the other. The FY2025 line was budgeted at $1,225,646 and came in at $1,224,162, $1,484 under.

WHAT THIS DOES NOT SHOW

The FY2025 split, or the split in any of the eleven annual-report years. Only three years in this archive publish the four parts and one more states them in prose. For every other year the 4–10% above the state minimum cannot be attributed to transportation, to capital or to debt — and those three behave nothing alike, since one tracks a busing contract, one is voted annually and one is fixed until it ends.

How the assessment is built

The district states its own method, and Lunenburg printed it. From the FY2017 annual town report, printed page 146:

> *DETERMINATION OF ASSESSMENT RATIOS Each Community's assessment is made up of four parts: ~ Required Minimum Contribution (set by the State) ~ Transportation & Other Operating Expenses above Minimum Net School Spending ~ Capital Outlay ~ Bonds (assessed based upon the Capital apportionment)*

and the two ratios, on the same page:

> *The number of students from each member community enrolled at Montachusett R egional Vocational Technical School divided by total Montachusett Regional Vocational Technical School Day school enrollment of member communities on October 1, 2017 equals the operating ratio.*

> *The number of students from each member community enrolled in Grades 1 through 12 divided by the total number of students enrolled in Grades 1 through 12 of 18 member communities equals the capital assessment ratio.*

So two of the four parts *are* apportioned by enrolment share — but they are the small two. The large one is the state's.

IN PLAIN TERMS

The bill has two halves that behave completely differently. The big half is Chapter 70's minimum local contribution: the state works out what Lunenburg as a whole can afford from its property values and its residents' incomes, and then divides that between Lunenburg's own schools and Monty Tech according to how much of the town's foundation budget each one accounts for. Nothing the town does moves it. The small half — transportation, capital and any bonds — is the district's own budget, apportioned by how many Lunenburg children are at the school, and it is the part member towns argue about.

THE EVIDENCE

The required-contribution half is verifiable twice over. Subtracting the Lunenburg school district's required local contribution from the town's, in DESE's Chapter 70 key factors workbook, gives Monty Tech's share for FY2007 to FY2026. That subtraction is checked at five points against figures the district's own business director gave the Finance Committee — FY2023 $1,012,282 and a foundation enrolment moving 83 to 94 (23 March 2022), FY2024 $1,127,113 (22 March 2023), FY2026 $1,270,711 and $20,827 a pupil (6 March 2025) — and every one matches to the dollar. It is then checked against DESE's own apportionment sheet as the district reprinted it, nine published fields for FY2026, all of which agree.

The share identity is measured rather than asserted: Monty Tech's share of the town's required contribution equals its share of the town's foundation budget to a tenth of a basis point in nineteen of the twenty years published. The exception is FY2007, off by 0.19 points.

That the town's total is wealth-bound rather than enrolment-bound is also measured: DESE's `target local contribution` equals its `combined effort yield` in every one of those twenty years, meaning the 82.5%-of-foundation cap never binds.

WHAT THIS DOES NOT SHOW

What the regional agreement says. A budget book states current practice; the agreement is what binds it, and it is not in this archive. It is the document that would say whether those ratios can be changed, how bonds are apportioned and over what term, and what withdrawing from the district would involve. Asked at the Finance Committee on 5 February 2026 whether the agreement was indefinite or could be renegotiated, the

Superintendent-Director said he believed it was ongoing and that amendments were very rare. A recollection at a meeting is not the instrument.

The students

FY	MONTY TECH	SCHOOL CHOICE	CHARTER	IN LUNENBURG	ALL RESIDENT
2014	70	69	44	1,513	1,699
2019	72	74	26	1,616	1,792
2022	90	77	28	1,578	1,781
2024	97	56	26	1,565	1,746
2026	97	58	22	1,553	1,730

The full thirteen-year series is at `/api/monty-tech.json` *and on* `/monty-tech`.

Two counts of the same children, and they disagree in every year. DESE publishes an October headcount of Lunenburg residents attending Montachusett, and a Chapter 70 foundation enrolment used to compute the assessment. For FY2026 they are 97 and 101. Across FY2014 to FY2026 the difference runs from eight below to fifteen above, with no consistent sign. One documented mechanism puts children into the assessment who are not at Monty Tech: the district's business director told the Finance Committee in March 2022 that four Lunenburg students attending trade programmes at Leominster and Nashoba "become part of the Monty Tech assessment". That explains a difference in one direction and not the years running the other way.

So every per-student figure has to name its denominator. The district's own budget book prints $13,213 for FY2026, dividing the assessment by the foundation enrolment of 101. Dividing by DESE's October headcount of 97 gives $13,758. Both are correct arithmetic on different counts.

WHAT THIS DOES NOT SHOW

Why the count has risen. A count is the outcome of families applying *and* of Monty Tech admitting, and the lottery exists precisely because more apply than there are places. Asked at the Finance Committee on 5 February 2026 how many Lunenburg students had been turned away, the district's business manager said she was unsure of the exact number.

And do not compare $13,213 or $13,758 against Lunenburg's own $18,027 per pupil. The first two are what the town is billed for a child. The last is what DESE reports Lunenburg Public Schools spending per pupil from *all funds* — grants, revolving funds, school choice receipts, and town-paid insurance and retirement attributed to the schools. Subtracting one from the other produces a number that means nothing, because the assessment has no grants, no revolving funds and no direct Chapter 70 in it: those are on Monty Tech's revenue side, where they pay for 62% of what the district spends.

The long series, and why it is drawn as candidates

The annual town reports carry a Monty Tech line from FY2011. Eleven of the twelve rows have an established column meaning — `v1=appropriated | v2=available | v3=expended` — and **every one of them carries** `status = 'check failed'` **or** `'no check'`: the extractor's own reconciliation, against the report's printed totals, failing. CLAUDE.md forbids aggregating across `status`, so these are candidates and not established figures.

FY	ANNUAL REPORT	STATE MINIMUM, DERIVED	ABOVE IT	STATUS
2011	$633,124	$598,756	+5.7%	check failed
2013	$681,078	$656,476	+3.7%	no check
2014	$757,805	$714,845	+6.0%	check failed
2015	$710,814	$670,826	+6.0%	check failed
2016	$799,478	$738,561	+8.2%	check failed
2017	$899,267	$824,401	+9.1%	check failed
2018	$877,527	$805,318	+9.0%	check failed
2019	$824,011	$748,657	+10.1%	check failed
2020	$783,987	$712,494	+10.0%	check failed
2021	$888,684	$814,475	+9.1%	check failed
2022	$876,289	$871,685	+0.5%	check failed

FY2012 has no accountant's schedule row. FY2023's row exists and its page **states no identity that fixes which printed column is which**, so its value is not read here; the $1,054,376 in the table above comes from the district's own FY2024 budget book instead.

What this cross-check is and is not. Every candidate sits above an independently derived figure by a margin consistent with the transportation and capital assessments — the same 4–10% band the four documented years show, and the FY2026 ledger figure sits at 5.0%. That is evidence about the *shape* of the series. It is not evidence that any individual value is right, and it cannot be: two wrong numbers can stand in the same ratio as two right ones.

The FY2022 outlier has a documented cause and it is not a defect in the extract. Town Meeting voted $897,448 for FY2022 and a Special Town Meeting in November 2021 reduced it; the Town Manager told the Finance Committee on 14 October 2021 that "a reduction in the Monty Tech Assessment will cover that cost". A certified assessment can move downward mid-year.

`report_monty_tech` **is not used here at all.** Its 70 rows are Monty Tech's own budget reprinted inside the FY2017 annual town report; its `column_meaning` is empty and its `status` is `no check`, so `v1` there is an ordinal — the first column of that page that held figures — and not a column name. Its label column has also absorbed the first printed figure. Nothing on this page reads it, and the generator refuses to run if it ever silently acquires a column meaning.

What would settle the rest

QUESTION	THE DOCUMENT	WHO HOLDS IT
What the district spends, year over year	Monty Tech's annual budget book, and DESE's End of Year Financial Report for LEA 08320000	the district's business office; DESE
The four-part split in FY2025 and before FY2023	the district's annual assessment certification to each member town	the Town Accountant; the district
Whether the ratios can be changed at all	the Montachusett regional agreement and its amendments	the district; each member town's clerk; DESE
Why FY2027 is $1,452,379 to the district and $1,452,426 to the town	the FY2027 assessment certification, and the Monty Tech line as voted at Annual Town Meeting	the Town Accountant
How many Lunenburg applicants are turned away	Monty Tech's admissions summary by sending town and year	the district
Why DESE's two counts of the same children differ	DESE's foundation enrolment detail for the Chapter 70 calculation	DESE

All six are registered in `sources/data/money-gaps.csv` and appear at `/what-we-cannot-answer`.

What was searched, and what that covers

The meeting archive was searched for `Monty Tech`, `Montachusett`, `vocational`, `assessment`, `regional`, `foundation enrollment` and `required minimum contribution`. **8,899 of the 12,015 meeting documents this archive holds are searchable — 74%.** The rest are image scans awaiting OCR, three whose text is drawn as vector outlines, fourteen blank, and fifty the town lists that we do not hold. An empty result is therefore *unproven*, not disproven.

The searches found the Finance Committee taking a Monty Tech budget presentation in March in almost every year, and they are where most of what is known about this line comes from: the district's business director explaining the formula in 2022 and again in 2026, the required minimum contribution stated for four separate years, and, on 8 January 2026, the Committee agreeing "that Monty Techs assessment should be aligned with the Lunenberg Public Schools" — which this page's arithmetic says is 95% outside its reach.

A note on what kind of documents these are

Rule 13a distinguishes a printout from an accounting system from a sheet somebody assembled. Applied here:

- **The FY2026 figure is a ledger figure.** MUNIS, general fund, period 12, with an account number and a period. It is the only one on this page of that kind.
- **The district's budget books are assembled documents**, and so is the Town's. They are used here anyway, for a specific reason: the DESE-sourced pages inside the FY2027 presentation reproduce, field for field, a state workbook this project holds independently. That check is run on every build and fails it if it stops holding.
- **The annual-report figures are extractions from a printed page** and every one fails its own reconciliation. They are candidates and are drawn as candidates.
- **The Finance Committee minutes are somebody's summary of somebody's slide.** They are quoted as what was said in a room, never as a measurement — with the exception of the five figures that turned out to match a state workbook exactly, which is stated as the coincidence it is not.