

MANS&C QUARTERLY

Massachusetts Association of Nonprofit Schools and Colleges

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e-newsletter

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PRESIDENT'S LETTER

The MANS&C board and I hope you can join us on March 4 as we welcome State Sen. Michael O. Moore, the new chairman of the Higher Education Committee, to our meeting at Holy Cross. With the opening of the new legislative session in January, this is a perfect time to share our concerns with the senator and to hear his thoughts on upcoming bills that could dramatically affect our institutions' independence and economic security.

A number of the newly filed bills are well-meant but misguided measures we've seen and helped defeat in past sessions. They were re-filed by legislators who are determined to provide some relief to financially strapped communities by drawing revenue from our institutions.

Legislators who have been guests at past meetings have pointed out that we need to keep reminding them of the vital social and economic contributions our institutions make to our communities. Local officials and state lawmakers may not understand that our institutions also are suffering from the economic downturn.

"And you can't just tell us once," one prominent legislator told MANS&C members. "You have to tell us over and over again. Every year, remind us."

There is no better reminder than a Community Impact Statement, which quantifies the benefits we provide to our cities and towns. It is particularly useful as a leave-behind after a meeting with your legislators or their staff.

Eight new senators were sworn in at the start of the new session. If one of them is your senator, stop by his or her office to introduce yourself, say hello to the staff and issue an invitation to visit your campus. A Community Impact Statement will help everyone understand the important role your institution plays in the community.

Community Impact Statements and face-to-face meetings helped the Boston Mayor's PILOT Task Force understand that increasing PILOT payments may force nonprofit institutions to cut back on their community services and staff. They also can help your state and local lawmakers see that PILOT programs, voluntary payments, new fees and costly regulations would have the same consequences statewide.

The MANS&C Web site, www.mansac.org, has detailed information that can help you create a Community Impact Statement. We also are available to answer any questions you may have on reaching out to your local legislators.

I urge you to join us on March 4 as we meet with Sen. Moore. It could be the most important meeting you have this year.

Best Regards,
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Higher Education Committee Chairman To Speak at MANS&C Meeting in March

MANS&C members will have a chance to meet the new chairman of the Committee on Higher Education, State Sen. Michael O. Moore, at a MANS&C luncheon on March 4. The event will be held at the College of the Holy Cross in Worcester from noon to 2 p.m.

Moore is a Democrat who represents the towns of Auburn, Grafton, Leicester, Millbury, Shrewsbury and Upton, as well as wards 5 through 8 in Worcester.

In addition to his new committee chairmanship, Moore serves on the influential Ways and Means and Public Safety committees.

As a senator, he has focused his efforts on job growth, economic development, transportation, healthcare and fiscal responsibility, as well as efficiency and accountability in state government.

Moore fought the move to close the Glavin Center in Shrewsbury, filed legislation to protect nurses and other health care workers from assault and secured funding for various area transportation projects, among other things.

During the last session, Moore worked with his colleagues in the House and Senate to appropriate funding to keep the Massachusetts Academy of Arts & Sciences at WPI open for another school year. He called the academy "a jewel in the educational system of the state."

He was born, raised and still lives in Millbury, where he served on the board of selectmen from 2001 until his election to the Senate in 2009.

Moore is a graduate of the Waltham Police Academy. He began his 18-year law enforcement career as an Environmental Police officer; eventually becoming an investigator in the Massachusetts Attorney General's Office.

In 2005, he was appointed assistant deputy superintendent at the Worcester County Sheriff's office, where he oversaw the community service program, inmate reintegration program and senior citizen community-outreach safety programs.



To reserve a spot at the luncheon meeting, contact MANS&C President Julaine McInnis at jmcinnis@inlyschool.org or call her at 781-545-5544, ext. 115.



Legislative Report

The new two-year legislative session opened in January, and clerks on Beacon Hill are currently going through thousands of new bills to determine their committee assignments.

One bill that has drawn immediate attention from MANS&C is a measure that targets nonprofit colleges and universities that

have investments or property valued at more than \$10 million. In addition to the disclosures they already make to the Massachusetts attorney general's office and in federal tax filings, the bill's sweeping provisions would require these institutions to:

- › Disclose the value of their assets
- › Annually calculate and report the benefits they receive from tax exemptions
- › List all employees who earn more than \$250,000 a year and contracts larger than \$150,000
- › Provide greater disclosure about potential conflicts of interest on their boards

The measure was sponsored by two Democrats, Sen. Patricia D. Jehlen of Somerville and Rep. Michael J. Moran of Brighton, whose district includes the area of Allston where Harvard University has been planning to expand its campus. The university stepped back from the project after its investment portfolio suffered in the economic crisis.

In a Jan. 24 article in the Boston Globe, Moran said he wasn't convinced that Harvard, which has an endowment of about \$27.4 billion, should be exempt from taxes in the same way a small charity would be.

"I don't think they should live by the same rules," he told the Globe.

In the coming weeks, MANS&C will keep you informed about all bills that would affect our institutions' financial well being and independence.

Introducing: State Sen. Katherine Clark

This is the first of a series of articles featuring new legislators on Beacon Hill.

State Sen. Katherine Clark of Melrose is a Democrat who represents Lynnfield, Malden, Melrose, Reading, Stoneham and Wakefield. Her district includes Austin Preparatory School in Reading and the Odyssey Day School in Wakefield.

Clark comes to the Senate after serving in the House of Representatives from 2008 to 2010.

In the new legislative term, she will serve as chair of the Joint Committee on Public Service and the vice chair of the Joint Committee on Community Development and Small Business. She also serves on the Joint Committee on Education and a number of other committees.

Clark is an advocate for services and programs that benefit our most vulnerable populations, including children and the elderly. A former member of the Melrose school committee, she is a staunch supporter of public education, which she has called "the state's best long-term development tool."



Task Force Recommends Expansion of "Voluntary" City PILOT Program

The long-awaited report of the Boston Mayor's PILOT Task Force, issued in December, recommends sweeping changes that would expand the city's payment in lieu of taxes program but also states that the program should remain "voluntary."

"The task force believes that any attempt to impose a legal or statutory requirement would face significant opposition and runs counter to the spirit of partnership between the city and its institutions that a successful PILOT program would provide," the report said.

Instead, the task force will "seek to encourage broad and uniform participation in the PILOT process."

The task force recommended that all nonprofit institutions should participate in the Boston PILOT program, including museums, cultural facilities, educational and medical institutions, and other large nonprofit organizations.

The report also recommended that PILOT contributions should be based on the value of real estate owned. Each organization would be asked to contribute 25 percent of the amount it would pay if its real estate holdings were taxable.

The first \$15 million of tax-exempt assessed property value for all institutions would be considered exempt. The task force reasoned that this would eliminate smaller nonprofits with limited resources.

The task force cautioned that increasing PILOT commitments may have unintended consequences; namely, community services and staff may be scaled back.

With this in mind, the task force recommended a credit of up to 50 percent of a PILOT payment for services directly benefiting city residents and for real estate taxes voluntarily paid on properties that would ordinarily qualify for a tax exemption based on use.

The task force guidelines said that community services also must:

- › Support the city's mission and priorities
- › Emphasize collaboration with the city to achieve shared goals
- › Be quantifiable

For its part, the city must be "consistent and transparent" in its approach so institutions can plan appropriately, the report noted. The task force also recommended that the new formula be phased in over a time period of five years or more.

The existing PILOT program in Boston is an ad hoc system of agreements between tax-exempt institutions and the city that often were created in connection with major development projects. As a result, PILOT contributions from similar tax-exempt institutions vary widely.

In the 2009 fiscal year, educational institutions that have PILOT agreements with the city owned tax-exempt property valued at \$7 billion. If taxable, they would have generated about \$190 million in property taxes for Boston.

Instead, the educational institutions contributed an estimated \$8.7 million in PILOT funds for fiscal year 2009, 4.6 percent of what they would have paid if taxable.

The complete report is located on the MANS&C Web site, www.mansac.org, under downloads.

(cont. on pg. 3)

Good Neighbors

Dexter & Southfield Schools Offer Unique Contributions

Along with their traditional community services, Dexter and Southfield Schools have two unique resources – the Clay Center and Briarwood – that extend an exceptional array of enrichment programs to their local communities and beyond.

The Clay Center for Science and Technology, on the campus in Brookline, is a state-of-the-art astronomical observatory and learning center. Briarwood is a field station for marine and environmental studies located in Monument Beach on Cape Cod.



The Clay Center

In addition to its classrooms and other student facilities, the five-story Clay Center building has seven research-grade telescopes – including a deep space telescope, sophisticated computer and science laboratories, a multi-media lecture hall and a solar- and wind-energy roof deck.

It also is a nationally recognized facility that has conducted research for the National Aeronautics and Space Administration (NASA) and hosts major conferences, many of which are open to the public. In recent years, these have ranged from a reunion of Expedition 14 from the International Space Station, to a re-enactment of the Great Pluto Debate, to the Planetary Society's first of many Town Halls, featuring Bill Nye the Science Guy.

"The Clay Center gives us the chance to give back to the community in a meaningful way," Center Director Robert Phinney said. The Center is open for Astronomy Nights during the spring and fall semesters and holds Astronomy Day in the spring. Both are free and open to the public, according to Phinney.

Every fall, the community also is invited to the Weather Festival, a family-oriented event with hands-on science activities. The festival is part of the Southern New England Weather Conference, which is run in partnership with the Blue Hill Weather Observatory and the National Weather Service.

The Clay Center Amateur Radio Club introduces students, summer campers and their families to radio electronics and the art of radio communications through HAM radio. The club has 96 members, including members of the community – and six astronauts.

Through a special arrangement with the town of Brookline, public school fifth and eighth graders take field trips to the observatory, where they view the Stars Court, lighted by fiber optics; learn about the phases of the moon in the Moon Court; step on scales that tell them what they would weigh on other planets, touch meteorites and more. The Clay Center also hosts local Scouts who are working on merit badges.

The students' faces light up when the Clay Center staff tells them about the Dexter and Southfield students who took part in NASA missions, such as the Southfield girl who flew over the North Pole gathering data and three Upper School students who participated in a NASA mission in Australia. They also show the students tires from the NASA Space Shuttle Atlantis and photos of the woman who commanded that mission.

"In a sense, we're trying to inspire them," Phinney said. "These examples encourage students to work hard and keep up their interest in math and science."

The facility also offers outreach programs to local schools and works in partnership with Brookline Adult and Community Education to offer classes in astronomy, music technology and amateur radio to area residents.



Briarwood

The two schools also operate the Briarwood Marine Science and Conference Center at Monument Beach in Bourne. In addition to its academic offerings for Dexter and Southfield students, the center provides summer marine science and sailing sessions for young people from area communities and beyond.

The Briarwood staff also provides programs for other schools and nonprofit organizations during the spring and fall.

Briarwood works with the Bourne Department of Natural Resources in the propagation of clams and oysters that eventually will be placed in the ocean nearby for the benefit of local clambers and oyster men. The department has installed its upweller technology, a key part of the aquaculture process, on a dock adjacent to the Briarwood pier.

Briarwood also volunteers its services for the Bourne Community Boating Program, teaching summer classes to local youths in boating, marine sciences and other subjects.

The Center staff works closely with local schools to offer affordable marine science programs for students during the school year.

Why provide all these externally focused services? "We wanted to have a presence in the community," Briarwood Director Jason Cassista said.

For more information about the Clay Center and Briarwood, go to www.dexter.org and www.southfield.org.

State Sen. Katherine Clark (cont. from pg. 2)

As a senator, one of her major priorities is improving children's reading skills at an early age and closing the achievement gap. She has filed legislation that would establish the Massachusetts Early Reading Council to advise state education departments on early-age language and literacy strategies.

The senator's other priorities are:

- Lowering healthcare costs
- Supporting small businesses and job creation
- Reforming the Massachusetts parole board and probation department

Professionally, Clark is an attorney who has served as a prosecutor and was general counsel for the Massachusetts Office of Child Care Services. She also worked as chief of the policy division for the Massachusetts Attorney General.

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The mission of MANS&C is to monitor and respond to legislative and regulatory activity by the Commonwealth that has a direct impact on the welfare of our membership.

