

*Fiscal Year*  
*2023*

# Holyoke Public Schools Operating Budget



*A Pathway for Every Student*

HOLYOKE PUBLIC SCHOOLS - 57 SUFFOLK STREET, HOLYOKE, MA 01040

<http://www.hps.holyoke.ma.us>



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# Holyoke Public Schools



July 1, 2022 ~ June 30, 2023

## Fiscal Year 2023 Operating Budget

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*...and to the other administrators, staff, and  
Colleagues for their collaboration and insight.*



## *THE PUBLIC SCHOOLS of HOLYOKE, MASSACHUSETTS*

*57 Suffolk Street, Holyoke MA, 01040*

### **A Message from Superintendent Anthony Soto:**

As your Superintendent, I am exceptionally honored to share the Holyoke Public Schools (HPS) recommended budget for FY2023. The recommended budget of \$113.4 million represents an increase of \$5.1 million from the FY 2022 state final budget.

This budget is designed to achieve our mission to ensure that all students graduate prepared to excel in college, career and community leadership. This budget also lives out our equity commitments:

- We ensure that students, families, and staff get the support they need to be successful.
- We seek out and incorporate the voices of those impacted, with a commitment to include those who have been excluded in the past.
- We promote access and inclusion for all students, staff, and families.
- We respect, embrace and honor the diversity of our students, families, staff, and community.
- We reflect on our own behavior to minimize harm to others.
- We intentionally build a community that is anti-racist, inclusive, and culturally responsive.
- We create a culture of acceptance and empathy so that everyone feels valued and is able to contribute to our community's success.

Together, over the next few years I look forward to working with all staff, students, family, and community to carry out our strategy that was developed by the HPS community, for the HPS community. This upcoming budget year we are making significant investments to strengthen our **multi-tiered system of support** we need to dramatically and urgently strengthen student learning. Notable investments to achieve these goals include:

#### **Instructional Leadership**

- Expansion of middle school and dual language programming
- Ensure that every school will have access to an ELA and Math Instructional Coach/Expert Teacher
- Ensure that every school will have access to at least 1 ELA and 1 Math Academic Intervention Teacher

- Provide Art and Music in every school

### **Management and Operations**

- Continue to invest in social emotional learning and mental health supports
- Ensure every school is allocated adequate counselors to meet students' needs
- Continue to purchase and maintain student Chromebooks and staff devices
- Upgrade to HVAC systems, phone systems, and other aspects of our facilities across the District

### **Family and Community Engagement (FACE)**

- Invest in FACE positions – now every school will have one dedicated FACE team member to support students and families returning to school, increase student attendance, and increase opportunities for authentic parent engagement
- Engage the community in the continued development of plans for distinct elementary and middle schools
- Support parent/family advisory groups (PAC's), such as the English Learner (EL) PAC and Special Education PAC
- Provide online enrollment for families

### **Professional Culture**

- Strengthen school leadership development through the Relay Instructional Leadership training (school based support over next 3 years generously supported by the Barr Foundation)
- Continue funding for our aspiring school leader pipelines and teacher pipelines
- Provide high quality, differentiated professional development offerings aligned to HPS priorities

On behalf of the entire Holyoke Public Schools, we are thrilled to welcome all our students back to school next year. We know that, by working with families, students, teachers, staff and community partners together, we will realize our vision of a pathway for every student.

Sincerely,



Anthony Soto

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# Introduction

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## About This Document

This budget document contains information in the form of tables, charts, and narratives in order to provide the context for important budget deliberations and decisions made by the Superintendent. It also serves as a guide to help administrators, elected officials, the public and other interested parties understand the District's programs, services, goals, and finances in the fiscal year 2023.

### PURPOSE STATEMENT

**Defining Policy:** The budget supports the strategic direction and provides specific paths for the District to follow in the upcoming fiscal year.

**Planning Tool:** The budget is a financial planning tool that allocates resources based upon an analysis of the challenges and opportunities facing the District.

**Communication Tool:** The budget document is a communication device designed to inform the reader of major budgetary decisions made by the District, and the fiscal and human resource allocations for the upcoming year.

**Focus on Performance:** The budget's layout is consistent with the District's organizational chart and the chain of command. By stating goals and objectives, the budget supports priorities and plans for every department.

## Executive Summary

Holyoke Public Schools is proud to present its annual operating budget. The FY 2023 budget is balanced and it reinforces the Superintendent's commitment to allocate as many resources as possible into our classrooms. Through the strong collaborative effort and innovative decision-making of district and school leaders, our District can present a strategic budget that focuses on improving student outcomes across all grade levels.

For FY 2023, the Superintendent will adopt a \$113.4 million general operating budget, representing a 4.7% increase over FY 2022. That is a healthy increase, but the overall news is better than just 4.7%. Last year's operating budget of \$108 million was reached with the help of supplemental funding from Federal Covid-relief funds. For this coming year, the district's \$113 million budget is achieved entirely with general fund dollars – without supplementing. The increase in general fund dollars available to the district has increased by 8% – the largest increase on record. That increase is due to very positive state budget news including robust state tax revenues that allowed the state to fully fund a number of key school funding areas. The most significant of those for Holyoke is the Student Opportunity Act (SOA), a state law passed in 2019 to increase funding for schools especially those serving large numbers of low income students, English learners, and students with disabilities. FY 2023 is the second year of a six-year phased in implementation of SOA. Given that other factors stay consistent, we can anticipate that SOA will continue to grow district budgets for several more years into the future.

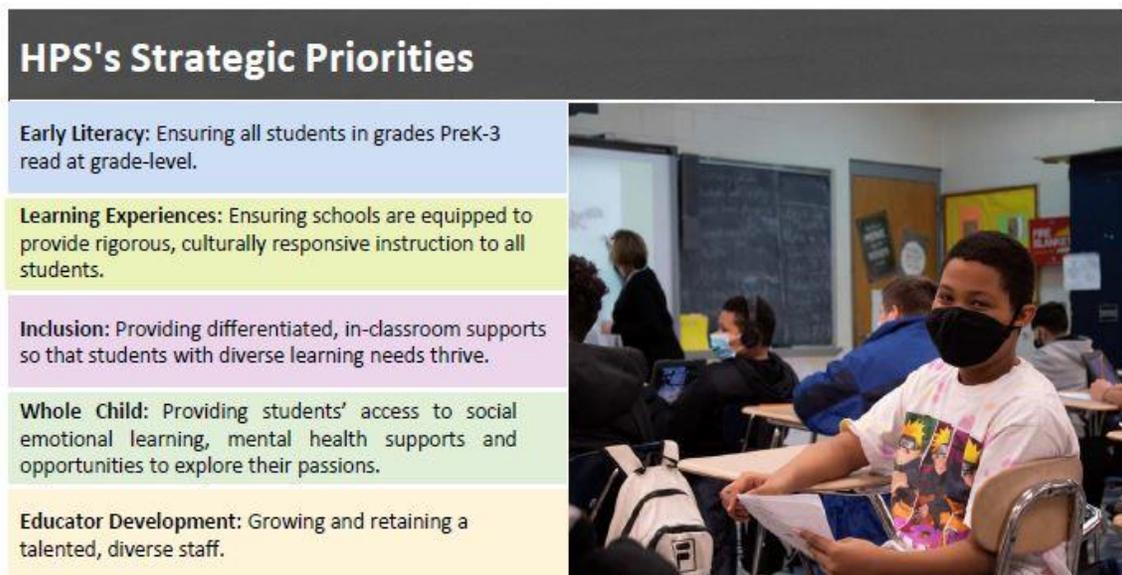
The District strives to achieve a budget proposal that aligns with its mission, vision, and core values, with the ultimate goal of student achievement in mind. Please note that all of the numbers presented in this budget are based on updated assumptions in the House Ways and Means Budget. It is important to note that the budget the City of Holyoke publishes for schools is much less, because it does not include Fringe Benefits for the School Department or any additional funding used to support the general operating budget. The budget the City published is \$103.1 million, which represents an increase of \$8.4 million or 8.9%.

## HPS STRATEGIC PLAN

Upon being appointed, Superintendent Anthony Soto undertook an Entry Plan process that included visits to classrooms across the district and deep listening sessions with students, parents, teachers, and community members. That process led Superintendent Soto to identify these areas as the most significant challenges the we must address together over the next few years:

- Ensuring students are grade level ready, especially by strengthening literacy instruction.
- Strengthening support for special populations especially through in-classroom support for students with disabilities, students who are English Learners and any student who is struggling regardless of label.
- Creating a positive learning environment for all, including developing a more comprehensive approach to addressing students' social emotional and mental health needs.

The entry plan led immediately into a Strategic Planning process that included many dozens of voices from across the district and community to shape a clear vision and strategic plan to achieve it over the coming years. The Strategic Planning process, while still under development as this budget document goes to print, has clarified those Entry Plan findings and shaped strategic priorities to guide us over the next several years. The Strategic Plan is still being refined, so some changes may still come in our wording and presentation, but the direction and priorities that we will pursue have emerged.



**HPS's Strategic Priorities**

- Early Literacy:** Ensuring all students in grades PreK-3 read at grade-level.
- Learning Experiences:** Ensuring schools are equipped to provide rigorous, culturally responsive instruction to all students.
- Inclusion:** Providing differentiated, in-classroom supports so that students with diverse learning needs thrive.
- Whole Child:** Providing students' access to social emotional learning, mental health supports and opportunities to explore their passions.
- Educator Development:** Growing and retaining a talented, diverse staff.

The infographic also features a photograph of a young student wearing a black face mask, sitting at a desk in a classroom and looking towards the camera. The student is wearing a white t-shirt with a colorful graphic. In the background, other students and a teacher are visible in a classroom setting.

The Strategic Planning process with all of the input from expert facilitators to the roughly 50 members of the Strategic Planning Team has also taught us that an organization's Vision and Mission must not remain static. The Vision and Mission statements developed under the direction of the previous administration drove the improvement efforts for the past 5 years. As our community and school district have evolved, so should our vision and mission for our future. The Vision, Mission, and Core Beliefs that have emerged through this intensive process are reflected below.



**Our Vision**  
HPS is a high-performing school system where students reach their full potential, educators inspire, families are partners, and the community thrives.

**Our Mission**  
Through an equitable, high-quality education and trusting relationships, all Holyoke students develop the skills and access the opportunities to graduate high school ready for life, career, and college.

**OUR CORE BELIEFS**

 Students are at the center of everything we do.	 Every child can and will learn.	 School is a joyful place of discovery, support, and belonging.	 Students and staff hold high expectations of themselves and each other.	 Trusting relationships lead to successful partnership.	 Our equity commitments are enacted in our daily work.
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To come from our Strategic Planning process are specific goals with robust action plans to achieve them. We will follow the guiding words above as we strive to achieve the targeted goals aligned to the priority areas. We will do so following the Equity Commitments identified below – a vitally important component from our Strategic Planning process to which we will remain vigilant.

**Equity Commitments:** Statements of promise to address systemic equity challenges

- We ensure that students, families, and staff get the support they need to be successful.
- We seek out and incorporate the voices of those impacted, with a commitment to include those who have been excluded in the past.
- We promote access and inclusion for all students, staff, and families.
- We respect, embrace and honor the diversity of our students, families, staff, and community.
- We reflect on our own behavior to minimize harm to others.
- We intentionally build a community that is anti-racist, inclusive, and culturally responsive.
- We create a culture of acceptance and empathy so that everyone feels valued and is able to contribute to our community's success.

### **Accomplishments**

We look forward to our new Strategic Plan guiding our continued district improvement for future years, but we also appreciate all that we have accomplished in the past year. The most significant event for 2021-22 was the return of all students to in-person learning. Prior to Covid, it would have been impossible to imagine citing students coming to school in person each day as a significant event. Yet, after 14 months of virtual school from March 2020 to May 2021, students learning inside our classrooms again was truly an enormous improvement for learning and overall student development. We are especially thankful for

school nurses, custodians, teachers, principals, and everyone who coordinated all necessary Covid precautions to make in person learning possible.

Our district is always moving forward. Even with a return from remote schooling requiring an extremely high amount of focus and attention, we continued to make improvements in many areas. Below are grouped accomplishments from 2021-22 in priority areas established under our previous Strategic Plan.

### **Priority Area 1 – High Quality Instruction for All**

- Strengthening instructional leadership and effectiveness through School leaders' professional development in partnership with Relay and the Barr Foundation, which has provided a strong foundation for increased alignment. This year's focus has been on lesson planning, weekly data meetings and academic monitoring in response to feedback. We need to continue to work on increasing the rigor to ensure that the work students are doing matches the expectations of the grade level standard.
- Implementing high-quality, standards-aligned and district-approved curriculum, with quarter 1 monitoring walks confirming that 90% of classrooms are doing so. The same walks also identified that in 65% of observed classrooms, students were given opportunities to apply what they know.
- Adding staff members dedicated to strengthening student learning and the student experience, including interventionist teachers, counselors, instructional paras, deans of management and operations and teacher coaches/expert teachers.
- Increasing access to interventions through interventionists or Lexia & STMath. April instructional data review revealed the impact of interventionists meeting with small groups of students, especially at in Morgan & Lawrence and across the district in gr. 1 & 3.
- Increasing the English attainment of students who are English Learners. Preliminary ACCESS data reveals that 26% of students made adequate progress, up from 15% last year. Many schools saw the highest percent of students making progress towards English proficiency within the last 5 years, with Morgan increasing from 41% in SY18 to 60% in SY22, while E.N. White increased from 27% in SY18 to 48% in SY22. While this is still an area where more improvement is needed, we are excited to be heading in the right direction.

### **Priority Area 2 – Personalized Pathways**

- Expanding opportunities for students at the high school level. Our High School Redesign Plan began being implemented in 2017-18. As a result, our high school offers a comprehensive and differentiated experience for students, which has helped contributed to the increase in the 4-year graduation rate from 62% in SY14-15 to 72.1% in SY19-20 to 76.4% in SY20-21. (Although we recognize that the bump for SY20-21 was partially due to changes in graduation requirements due to the pandemic.)

- Increasing access to students, especially students of color, engaged in advanced coursework. Over the years, Holyoke has expanded access to advanced coursework by adding dual enrollment and early college opportunities. The percentage of students enrolled in early college programs steadily increased up to the pandemic, when they took a downturn. This first year after the pandemic has been steadily rebuilding the number of students in our early college programs.
- Growing the dual language program, which is now at three schools (Metcalf, E.N. White, Kelly). More than 600 students are enrolled in dual language, representing nearly 17% of PreK-8 students. We are growing by adding an additional grade level at all schools next year and an additional Kindergarten class at Kelly.
- Increasing access to PreK, especially full day PreK seats. Over the years, Holyoke has nearly doubled access to pre-kindergarten, with 512 seats now available. Families of younger children seem to be hesitant to send their children back to school, so we are engaging in active outreach to fill more PreK seats next year. We are also transitioning some half-day seats to full-day by ensuring that students with disabilities are enrolled in all PreK classes, not just the half-day classes.

### **Priority Area 3 – Engaged Student, Family and Community**

- Appreciating our educators and staff for being caring, compassionate and committed. Our entry plan survey results identified “teachers and staff” as the greatest strength in our school district. We know that relationships between staff, students and families contributes to a strong school environment and strong community.
- Acknowledging everyone in the district’s response throughout the pandemic to meet basic needs of students and families.
- Recognizing and appreciating the counseling services available to students at school. However, there is recognition that the availability of counseling services doesn’t meet the demand, especially in this time where we are emerging from the pandemic.
- Partnering with the Massachusetts School Building Authority (MSBA) to build a new middle school. In September, a School Building Committee was appointed and has representation from every ward. Holyoke has made it past the eligibility phase and is working with the City Council to secure two votes to move forward to the feasibility phase. On a related note, in 2021, HPS also convened a 16-member middle grades collaborative study team to solicit input on what people want to see in a middle school experience, which included focus groups, surveys and research. In spring 2022, HPS also launched a Rezoning Task Force and Rezoning Working Group to continue forward on the plans for distinct elementary and middle schools, which will require redrawing the school boundary lines. Decisions will be made and announced by November 2022 for fall 2023 implementation.
- Investing in School Councils as important vehicles for school improvement and family engagement.

- Continuing to strengthen our translation and interpretation services by increasing access to Spanish language content, especially in public meetings.

#### **Priority Area 4 – An Effective and Thriving Workforce**

- Increasing the stability, diversity, and effectiveness of our principal team allows for deeper connections with families and more effective leadership practices. At HPS, 31% of principals identify as people of color, up from less than 10% in the first year of receivership. Four principal openings in the past two years have been filled by internal candidates.
- Investing in professional growth development of principals and their leadership teams and central office personnel who support learning in schools. With financial support from the Barr Foundation, Holyoke chose to partner with Relay Graduate School of Education to provide training to improve classroom practice. The quality of the professional learning and effectiveness of implementation, with customization to Holyoke, has been widely well received. Many are eager to see this investment of time and resources continue and are looking to build on this work. This summer, another 40 people will attend a 4-week Relay training.
- Increasing the diversity of our educators and staff is a result of a concerted effort to recruit, develop, and retain teachers of color. Holyoke has more than doubled the percent of teachers of color, from 13% in 2015 to 28% in 2021. HPS also continues to participate in DESE’s Diversity Network Professional Learning Community to review and improve practices around our talent plans and a cabinet member is finishing her final year of the Influence 100 Program.
- Developing teacher pipeline programs in partnership with local universities such as Mount Holyoke and Elms College, and with organizations such as Teach Western Mass and Teach for America, so that paraprofessionals or career changers can earn their teaching certification. More than 100 staff members have matriculated through these programs.
- Recognizing the valuable work of teacher leaders through the career development pipeline within its salary structure allows veteran teachers the opportunity to remain in the classroom and advance professionally. The district has 12 Advanced Teachers and 24 Expert Teachers and is looking to increase these numbers to provide more modeling and support for classroom teachers.

#### **Priority Area 5 – A System of Empowered Schools**

- Developing an elementary schedule for implementation in future years that builds in sufficient time for (1) core content, (2) targeted instruction & enrichment, (3) social emotional learning, and (4) teacher collaboration/planning, with the support of Education Resource Strategies.
- Ensuring a school year that was as safe and healthy as possible, given the pandemic. (See the overall section for more information.)
- Leading an inclusive entry plan and strategic planning process to set a path forward for HPS in

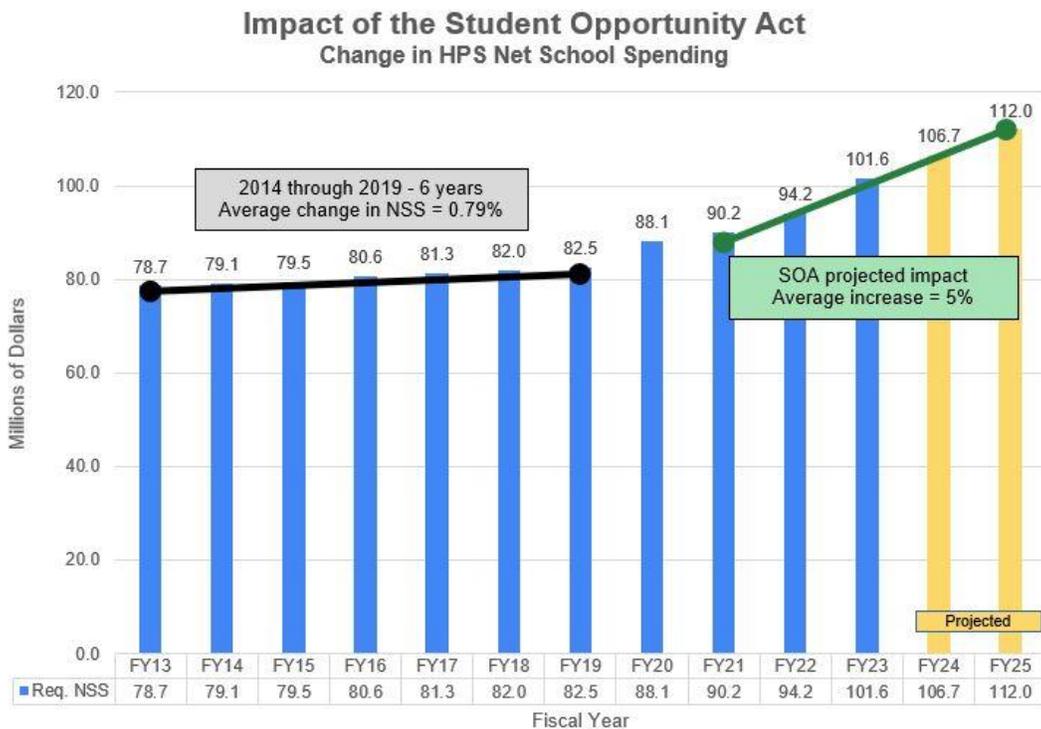
the next three years. (See the overall section for more information.)

- Moving forward with \$900,000 of kitchen upgrades.
- Continuing to improve our building infrastructure through accelerated repair projects, in partnership with the MSBA.

## FISCAL YEAR 2022 BUDGET UPDATE

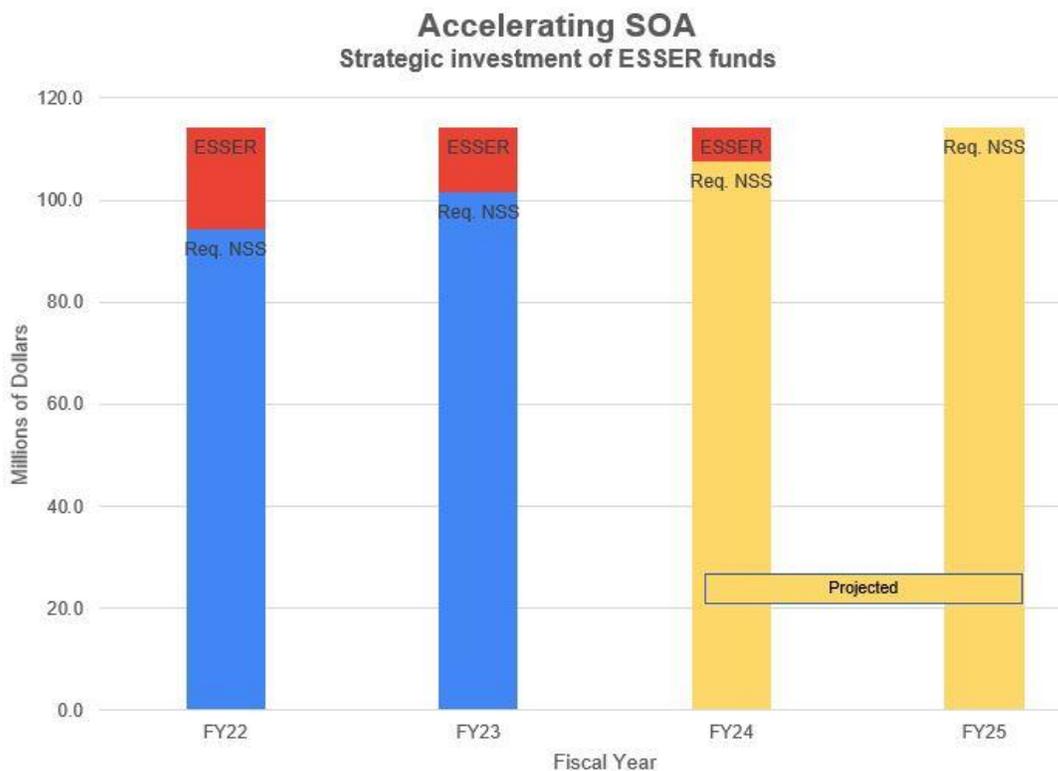
With the end of the fiscal year approaching, it is important to reflect on the significant events that have occurred during the current year, as they have played a major role in shaping the FY 2023 budget. The fiscal highlights of FY 2022 are the Student Opportunity Act and Federal Covid-relief funds referred to as ESSER (formally the Elementary and Secondary School Emergency Relief fund).

**The Student Opportunity Act (SOA)** is a state law passed in 2019 to increase funding for schools within communities that have higher populations of ELLs, SPED, and Economically Disadvantaged students. State and district leaders had known for years that the prior school funding laws did not provide adequate funding for certain categories – especially low-income students and those with identified needs such as English learners and students with disabilities. The passage of SOA was a landmark achievement that provides a major infusion of new funding to Massachusetts public schools. The law was written to gradually increase over 7 years the underlying funding formulas for those categories and others that drive the creation of each school district’s required budget level (known as required net-school spending or NSS). Originally, 2020-21 was to be the first of the seven years. The pandemic changed a lot, including SOA. The first year of implementation was delayed until 2021-22 (Fiscal year 2022) and the implementation period was shortened from 7 years to 6 years. The first year of an SOA-driven budget for Holyoke Public Schools was auspicious. Required net school spending increased by over \$4 million, a rise of more than 4.5%. (The increase in FY 2023, the second year of SOA is even higher, \$7.3 million, 7.8%. So, if other factors stay consistent, we can anticipate that SOA will continue to grow district budgets.) The impact of SOA on the district budget is fundamental. The graph below shows the projected Net School Spending (NSS) amounts for HPS from 2014 through 2023 given a 5% annual increase.



SOA has literally bent the curve. Budget forecasting is fraught with risk as forecasts are built on numerous economic, fiscal, and demographic assumptions. If any of the underlying assumptions change significantly, our budget trajectory could as well. (The biggest risk to HPS’s budget is a general slow down in the state’s economy resulting in a significant decline in state tax revenues. The most likely factor that could cause a significant decline is a national economic downturn – a recession.) If economic conditions and state revenues continue without a significant downturn, the changes SOA makes in the underlying factors defining HPS’s budget will continue to increase the district’s budget at healthy rates for several more years. Because of the confidence SOA provides for future budget growth, we were able to take advantage of the second major fiscal highlight – ESSER.

**ESSER** - The Federal government passed three laws in rapid succession between March 2020 and March 2021 injecting massive amounts of money into the US economy to support recovery from the pandemic. Each of the laws provided money for schools, known as ESSER. Altogether, ESSER funds for HPS totaled over \$57 million and can be spent between fiscal years 2021 and 2024. (We will have ESSER funds available for FY 2023 and one more fiscal year after that.) Temporary funds, while a blessing, have limitations – they expire. We cannot build a sustainable budget on ESSER dollars. However, the combination of SOA and ESSER worked to our advantage. Knowing that SOA is likely to increase HPS’s budget by healthy percentages in coming years, we used ESSER funds not only for immediate recovery from 14 months of remote schooling, but also to invest in key staff positions that we plan to keep for the long-term. Essentially, ESSER allowed us to accelerate the implementation of SOA. The chart below shows a simplified image of how we used ESSER to “top off” our general funds with investments in staffing.



Investments in our staff – We used ESSER funds to invest in these critical staffing areas:

- Increased the number of **School Counselors**
- Created **Academic Intervention Teachers** at each school
- Implemented new **Expert Teacher / Instructional Coach** model at each school
- Increased **English language (formerly ESL) teachers**
- Established **Deans of Management and Operations** positions at each school

Not all ESSER funds can be spent on staffing without creating the risk of a “fiscal cliff” when ESSER expires.

We have also used ESSER dollars to invest in other key areas, including:

- Over **\$3 million in retention bonuses** to incentivize all staff to continue with HPS
- Adding **discretionary dollars to each school’s budget** – adding to the funds each principal has
- Major investments in **facility & grounds improvements**

## FISCAL YEAR 2023 BUDGET PROCESS

Holyoke Public Schools' annual budgeting process is the mechanism by which the District's priorities are formulated and District resources are allocated. By strategically aligning goals with financial and human resources, the District is making a direct commitment to attaining these goals.

The development of the budget is a year-round process, and is broken out into three key phases: the Planning and Strategy Phase, the Budget Development Phase, and the Budget Adoption Phase.

Each of these phases are equally important, and rely on strict deadlines and teamwork to ensure that the budget is in line with the District's strategic goals and priorities. Throughout the phases, the Budget Team releases three major budget projections: (1) Preliminary, (2) Level Service, and (3) Final Balanced, each signifying a milestone in the process.

## FISCAL YEAR 2023 BUDGET CONTEXT AND OVERVIEW

Our work developing the FY 2023 budget builds on the positive trends from FY2022. Our required net school spending amount set by the state went up by an unprecedented 7.8%. Some of the reason for the degree of the increase may not be permanent – state tax revenues exploded in 2021 and continued in 2022 far exceeding even the rosier of prior projections, and the state smartly increased its inflation assumption in calculating school budgets. Those trends may not continue, but the biggest positive impact on our FY 2023 budget will – SOA.

**Level services to start** – To begin the development of our FY 2023 budget, we took the same fiscally responsible starting point as in past years – determining a level services budget, the cost of continuing with the same levels of services as in FY 2022. (Note that the level services budget included continuing investments in the new staffing positions started in FY 2022.) When submitting their detailed level service requests, the Chiefs and Department Heads thoroughly reviewed each line item, and justified to the Budget Team the importance and measured success of the item.

**Strategic investment** – In most prior years, the cost of a level services budget exceeds available revenue – producing a deficit in the millions of dollars. The norm for school and district leaders in Holyoke as well as many, many school districts throughout Massachusetts and the country, is to produce a list of potential cuts to accompany the level services budget. For FY 2023, our calculations from level services showed that, as anticipated, we were able to absorb many of the new staffing positions created in FY 2022 using ESSER dollars into our general fund budget and still produce a balanced budget. This is exactly the “accelerating SOA” strategy we envisioned. In addition, ESSER funds allowed us to continue those investments. After the Federal government's final large Covid-relief bill passed, school leaders in FY 2022 saw a shift from a “cut list” to a “new initiatives” list – strategies that each leader would invest in if they had more funds available. FY 2023 saw the “new initiatives” phase of budget development for the second year in a row. Our strategic investments budgets include:

- Injecting almost \$6 million of discretionary funding into school spending plans (more funds for each principal to build their budget)

- Expanding the number on Academic Interventionist teachers
- Growing our Expert Teacher / Instructional Coach model further
- Over \$8 million of capital projects upgrading and modernizing our schools

**Instructional Design** – The development of the district’s budget is always highly collaborative & aligned with district priorities. Every principal and district leader developed a piece of the overall budget and does so in line with the overall priorities. For FY 2023, we took the collaboration and alignment to a higher level. Each principal, with more funds to apply than in prior years, created their budget based on an “Instructional Design” – a planned staffing structure and organization that would best address the major priorities identified by Superintendent Soto’s Entry Plan – accelerating literacy, serving students with identified needs in inclusive settings, and supporting students social/emotional learning needs. The Instructional Design process allowed each principal to apply the increased funding strategically based on the unique needs at their school yet in line with the overall district priorities.

A symbol of the Instructional Design process is that school budget hearings – where a principal presents their budget – began not by looking at budgets on spreadsheets, but with principals presenting their Instructional Design – talking about they planned to align students and teachers and other staff to best achieve learning goals. The image below is a visual representation of the intentional design of one school.



## WHAT THIS BUDGET ACCOMPLISHES

We believe that the process we used to develop our FY 2023 budget takes full advantage not only of the increased funds available through SOA and ESSER, but also of the vision and ingenuity of leaders and staff across HPS. The budget is aligned to our strategic priorities, our key draft objectives for this upcoming year are:

### Instructional Leadership

- Offer numerous intervention and acceleration opportunities through providing strong core instruction and intervention materials and resources, as well as investing in content coaches and interventionists in ELA and Math
- Continue to invest in various pathways for students (e.g. dual language, preschool, high school academies and high school career vocational technical education programs) with a specific desire to promote access for students who are English Learners and students with disabilities
- Shift to K-5 elementary schools and 6-8 middle schools within Instructional Designs appropriate for each level
- Continue to grow our Instructional Leadership through intensive Relay training

### Management and Operations

- Take advantage of ESSER funds to invest in upgrading our schools
- Invest in a Management and Operations Dean in every school so that Principals and AP's can keep their focus on instruction and improving student academic outcomes

### Family and Community Engagement

- Support students social/emotional learning and needs with a multi-tiered system of supports
- Engage the community in plans to build a new middle school building

### Professional Culture

- Provide retention bonuses for staff in all positions to continue with HPS
- Increase the number of Interventionist Teachers and Expert Teachers throughout the district
- Develop administrators and teacher leaders instructional leadership skills to help accelerate student learning
- Offer and embrace anti-racism training and practices for all staff

The investments below reflect the objectives above.

### Instructional Leadership

- Expand Dual Language at EN White, Metcalf, and Kelly
- Strengthen the middle school program at STEM & Holyoke Middle School through strategic design and coordinated district support
- Fully staff ESL and Special Education teachers to meet the needs of dual-identified students
- Implement the first year of a new Strategic Plan

- Invest in an Inclusion/co-teaching Model at multiple schools following according to each principal’s Instructional Design
- Provide Art and Music in every school
- Allocate an ELA and Math Instructional Coach/Expert Teacher to every school
- Invest in dedicated District Special Education Instructional Coach/Expert Teacher
- Ensure that every school will have access to at least 1 ELA and 1 Math Academic Intervention Teacher
- Maintain existing class size ratios (K-2: 20.9 students; 3-5: 21.7 students; 6-8: 23 students)
- Realize the High school redesign through further growth of: dual enrollment/early college offering, the expansion of the Work-Based Learning Program, and further alignment of academic Academies
- Facilitate greater learning opportunities in workplaces for students at Dean Tech by moving to a “week-on / week-off” schedule favored by many Career Vocational and Technical schools

### **Management and Operations**

- Establish Holyoke Middle School as an HPS run school replacing our partnership with Veritas
- Transition Donahue students to STEM for middle school, making Donahue a PK-5 elementary school
- Apply over \$8 million of funds to upgrade school facilities
- Continue to invest in social emotional and learning and mental health support by developing a tiered set of supports for students
- Ensure every school is allocated counselors based on the size of the school, number of students with IEP counseling services, and grade configuration
- Provide furniture and materials for the opening of new classrooms
- Continue to purchase and maintain student Chromebooks and staff devices
- Invest in Management and Operations Deans for each school so that Principals, AP’s, and other leaders can focus on improving instructional practices and outcomes for students

### **Family and Community Engagement (FACE)**

- Provide greater support for attendance and engagement
- Invest in FACE positions so that every school will have 1 dedicated FACE team member to support students and families, increase student attendance, and increase opportunities for authentic parent engagement
- Provide language access through District positions and vendor contracts to support translation and interpretation services to families
- Support parent/family advisory groups – the English Learner (EL) PAC and Special Education PAC
- Provide online enrollment for families
- Engage the community in the planning for our shift to distinct elementary and middle schools

### **Professional Culture**

- Strengthen school leadership development through the Barr / Relay Instructional Leadership training
- Continue funding for our aspiring school leader pipelines and teacher pipelines
- Maintain salary obligations to staff
- Provide high quality, differentiated professional development offerings aligned to HPS priorities

## Fiscal Dependency FY23 Projected Revenues



## FINANCIAL OVERVIEW

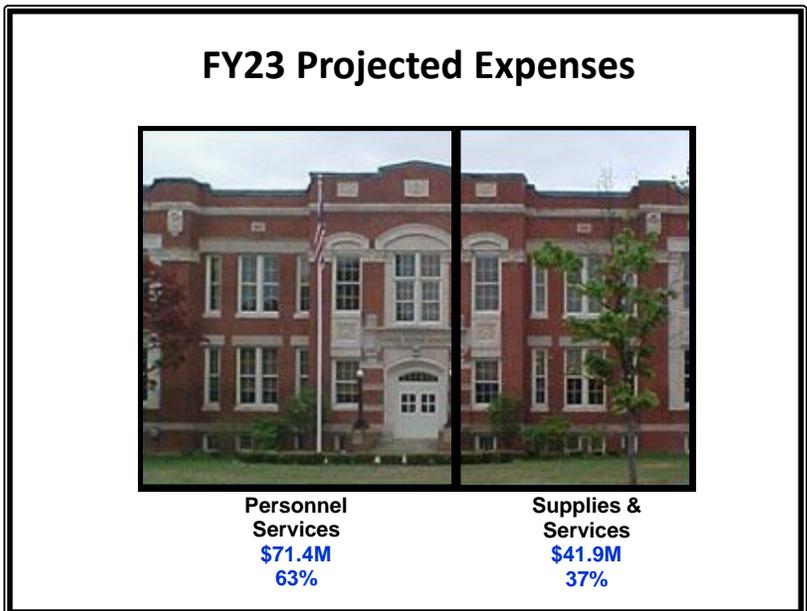
There are two main categories of funds available to the District, the general fund and special revenue funds. The general fund primarily consists of Chapter 70 State Aid and the City’s minimum local contribution. Special revenue funds primarily consist of grant funds and revolving accounts.

This financial overview will focus primarily on the “General Fund” budget, which includes the required net school spending and additional appropriations provided by

the City to cover costs that are not eligible for net school spending. Overall, the projected budget for FY 2023 is \$113.4 million. Holyoke Public Schools is heavily fiscally dependent on the state as shown in the image above. Over 88% of the General Fund Budget comes from the state Chapter 70 funding which is (\$89.8 million in state aid). The remaining \$11.8 million or 11.65%, is the City’s required local contribution.

The FY 2023 general operating budget increased 4.7% when compared to the FY2022 final budget. Overall, the District’s revenue is up as the state gradually implements the recommendations of the Foundation Budget Review Committee through the Student Opportunity Act (SOA). Even with a decrease in enrollment, we saw an increase in Chapter 70 aid of \$6.9 million when compared FY 2022.

Expenditures can be broken into two major categories, personnel services, and supplies and services. The majority of the District’s expenditures (63%) are in personnel services, which include employee salaries, stipends, and fringe benefits. The other major category making up the District’s general funds budget is supplies and services (37%), which include supplies allocated to schools and departments, as well as major contracted services purchased by the District. Personnel service expenditures increased by 5.5% over FY 2022, and supplies and service expenditures increased by 3.7%. The majority of the increase in salaries is due to the Districts continued investment in teachers through our performance-based compensation model. In addition, staffing was added to support ELL, Special Ed, and social emotional and behavioral learning efforts.

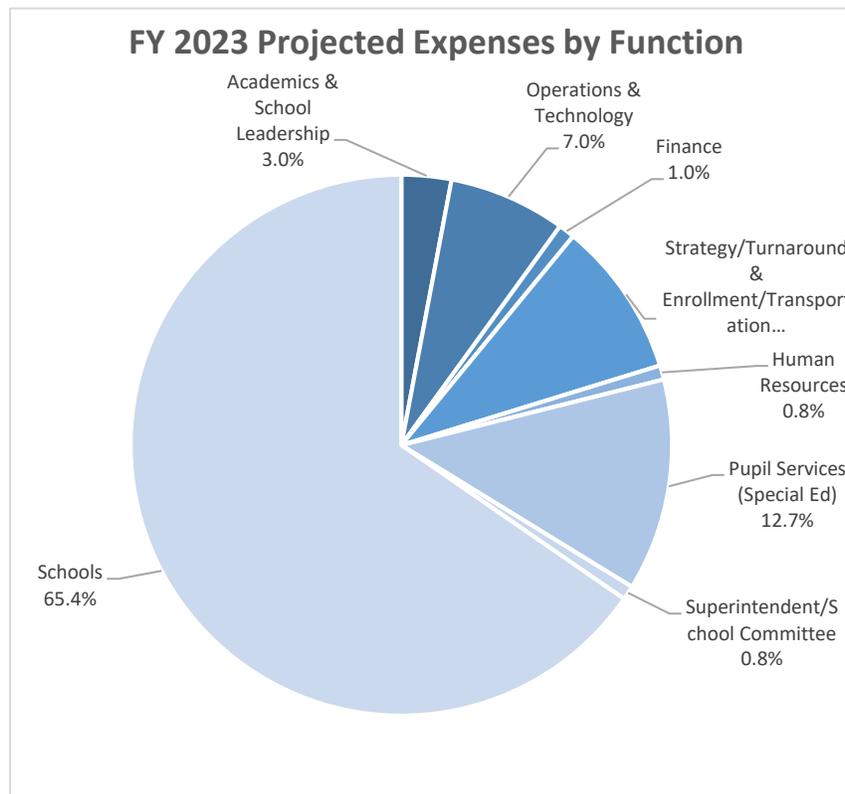


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Overall expenditures had a 4.9% increase when compared to the adopted budget.

	2022	2023		
	<u>Adopted</u>	<u>Budget</u>	<u>Change</u>	<u>% Chg</u>
<b>Personnel Services</b>	\$67,735,474	\$71,493,217	\$3,757,743	5.5%
<b>Supplies &amp; Services</b>	\$40,409,922	\$41,911,999	\$1,502,077	3.7%
<b>TOTAL:</b>	<b>\$108,145,396</b>	<b>\$113,405,216</b>	<b>\$5,259,820</b>	<b>4.9%</b>

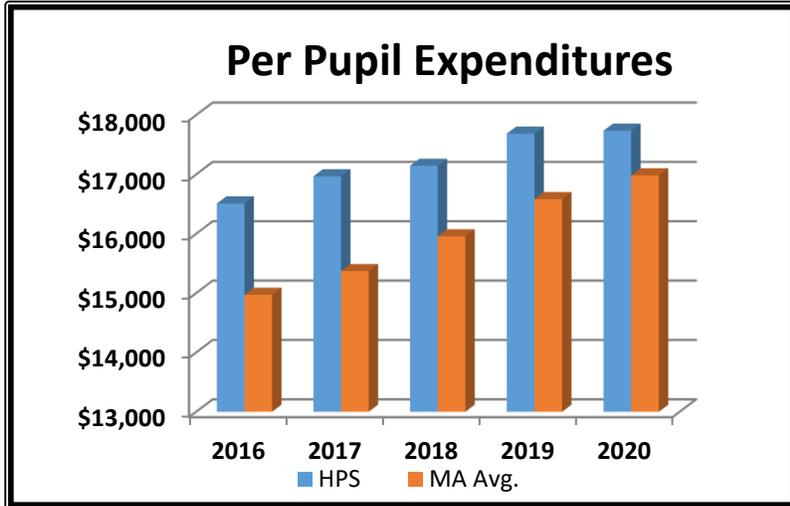
The Superintendent has structured the organization into divisions, each with its own mission and a Chief or Department Head in charge of carrying out that mission. All major decisions in the organization flow through one of these channels. The largest division is schools, which comprises over 65% of the all funds expenses. Please note that included in the “Schools” category is charter tuition and fringe benefits.



The next largest division is Special Education, which captures 12% of expenses. A large portion of the SPED budget is comprised of people and services that are provided to schools as well as out of district tuition.

The third largest division is Turnaround & Enrollment / Transportation, which captures 9.3% of expenses. The majority of this division is transportation.

**INFORMATIONAL**



According to Massachusetts General Law, the Holyoke Public School District is a fiscally dependent entity organized under the City of Holyoke and therefore does not have the authority to tax, issue bonds, or incur debt. The majority of the District’s general fund budget comes from state aid as noted above. Because of the significant amount of state funds, each year the City waits for the decision for funding from the State

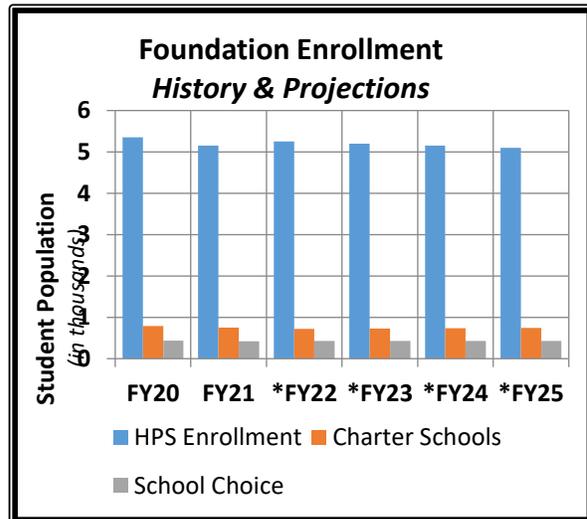
and then provides its required contribution.

Historically HPS has spent an average of \$16,596 while the state average for that same time has been \$14,782. The District has a high number of SPED, ELL, and economically disadvantaged students in comparison to the rest of the state and thus spends more money per student on average. Enrollment for our District determines funding so any loss in enrollment poses financial challenges.

Holyoke Public Schools has a high transient population. This characteristic makes it quite difficult to accurately track and project student enrollment between schools. Although the task can be difficult, estimating student enrollment is a critical function necessary for the District to appropriately staff buildings and project funding.

**FOUNDATION ENROLLMENT**

Foundation enrollment is a count of the number of pupils for whom a school district is financially responsible on October 1<sup>st</sup> of any given year. It is comprised primarily of local resident school children attending their community’s local or regional school district. However, it also includes students for whom the District is paying tuition, such as those at Commonwealth Charter Schools, other school districts (school choice), special education schools, and other settings. In order to be included, a student must be officially enrolled on October 1<sup>st</sup>. Those who leave in September or arrive after October 1<sup>st</sup> are not counted. A student who happens to be absent on October 1<sup>st</sup> is included nonetheless; this is a measure of enrollment, not attendance. DESE computes



foundation enrollment using pupil-specific data submitted by each district through the Student Information Management System. A district’s foundation pupil headcounts are applied to specific cost rates to arrive at the upcoming year’s foundation budget.

To forecast future enrollment, Holyoke Public Schools uses a four-year average method for both the District enrollment and enrollment at charter schools and school choice. Total foundation enrollment is the combination of all these projections. The chart shows that In-District has gone down and charter enrollment is relatively flat but school choice enrollment has increased since 2015. It is important to continue to improve HPS outcomes and create pathways to keep our students from choosing other Districts.

	FY17	FY18	FY19	FY20	FY21	FY22	*FY23
Foundation Enrollment	6,478	6,463	6,330	6,330	6,357	6,159	6,033
Charter Schools	843	824	802	790	749	721	746
School Choice	374	390	424	433	421	445	449
Estimated In-district Enrollment	5,344	5,366	5,293	5,350	5,153	5,253	5,200
Foundation Budget Per Pupil	12,401	12,554	13,006	13,676	14,183	15,212	16,843

## ACTUAL ENROLLMENT

Actual enrollment is a headcount of students attending Holyoke Public Schools on October 1<sup>st</sup> of any given year. This enrollment differs from foundation enrollment because it only includes students in the District as opposed to all students for which the District is financially responsible.

For FY 2023, the District’s foundation enrollment is 6,033, while actual enrollment in Holyoke Public Schools is estimated to be approximately 5,200. Understanding how foundation enrollment is calculated is essential to understanding school finance, especially for Holyoke Public Schools. When students leave the District to attend a Commonwealth Charter School, they take with them all per pupil funding provided by the State. This practice adds pressure to the District’s budget. Additional school choice options at Holyoke Public Schools, such as new middle school experiences and the dual language programs may increase enrollment as these attractive options may draw in students who were previously leaving the District for school choice and charter schools.

Because of dwindling enrollment, uncertainty of revenue streams and the District’s commitment to invest in classrooms, we must be creative in the way we deliver services. In order to create funding for our investments to schools, cuts may have to be made away from the classroom. \$2.8 million in central office and District level budget cuts were made to Central Office since the receivership but most of those happened in FY 17 and FY 18. How we use ESSER funding, and the impact of SOA on future HPS budgets is critical to the way we are able to allocate resources. The District needs to invest ESSER dollars wisely and ensure sustainability of investments that are producing good outcomes.

## CONCLUSION

By utilizing the framework for developing the budget, which includes aligning resources to support the turnaround plan, Holyoke Public Schools has presented a balanced budget and has invested in important initiatives geared towards rapidly improving student outcomes. Holyoke Public Schools' will continue to move forward toward a community working together to prepare our students for their future. By that standard, this budget is not just a process of fiscal operations, but a part of the larger process to improve academic and non-academic outcomes for all students who attend our schools.

## District Administrators

### General Budget Questions:

**Mickey Buhl**

Chief Finance Officer  
mbuhl@hps.holyoke.ma.us

### Questions about Policies:

<b>Finance</b>	Mickey Buhl <i>Chief Financial Officer</i>	413.534.2000 ext. 1600
<b>Superintendent's Office</b>	Anthony W. Soto. <i>Superintendent</i>	413.534.2000 ext. 1300
<b>School Improvement &amp; Leadership</b>	Stephen Mahoney <i>Assistant Superintendent</i>	413.534.2000 ext. 1420
<b>Strategy &amp; Turnaround</b>	Erin Linville <i>Chief of Strategy and Turnaround</i>	413.512.5302
<b>Human Resources</b>	Beth Gage <i>Chief Talent Officer</i>	413.534.2000 ext. 1500
<b>Pupil Services</b>	Marianne Currier <i>Chief of Pupil Services</i>	413.534.2000 ext. 1200
<b>Technology &amp; Operations</b>	Matt Kuzmeskas <i>Executive Director of Technology &amp; Operations</i>	413.534.2000 ext. 1701

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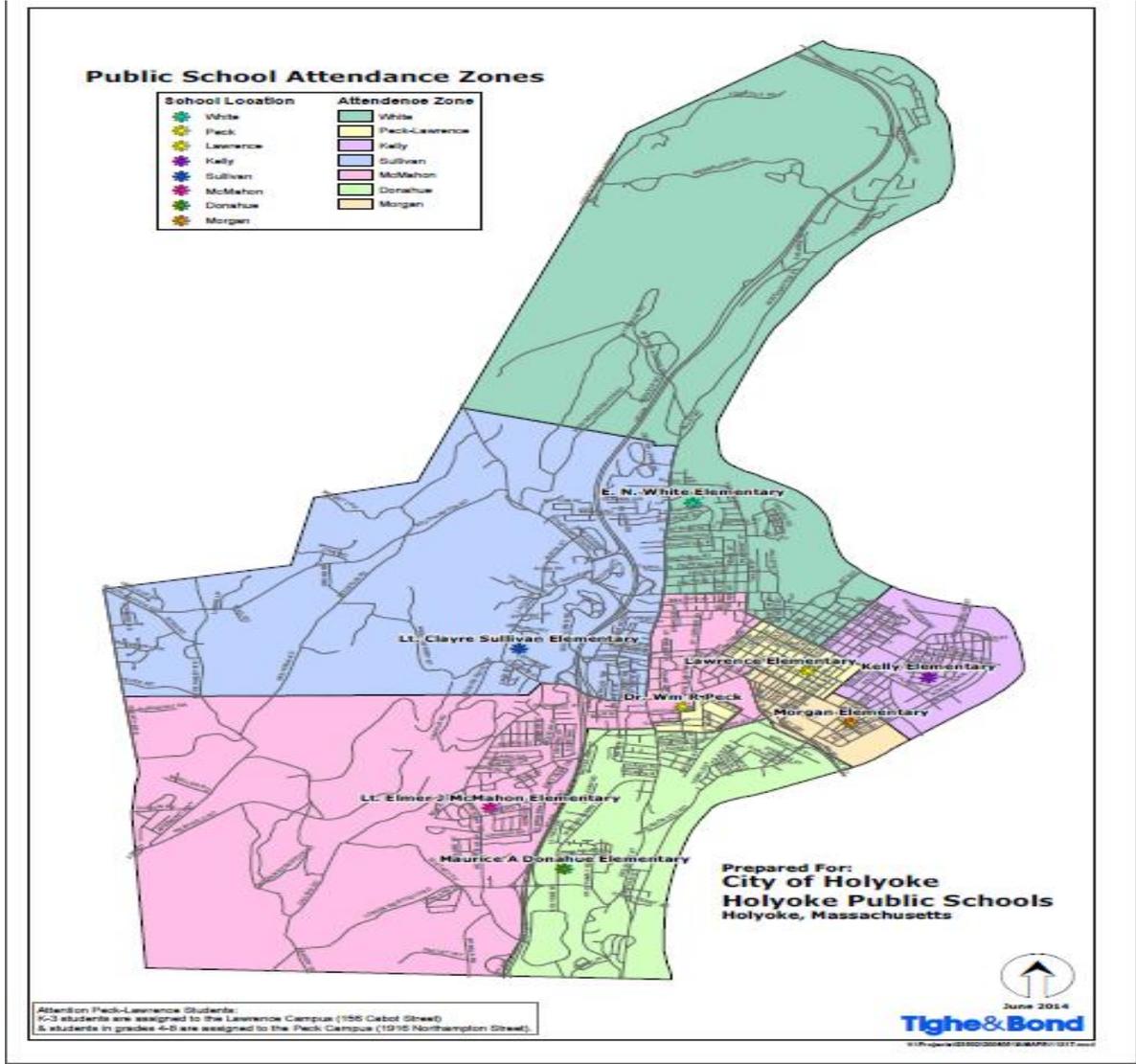


# Organization and Financials

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# Introduction to Holyoke Public Schools

The City of Holyoke is located in Hampden County on the banks of the Connecticut River bordered by West Springfield on the south; Westfield, Southamptn, and Easthampton on the west; and separated from South Hadley and Chicopee by the Connecticut River on the east. Holyoke is 90 miles west of Boston; 34 miles north of Hartford, Connecticut; and 150 miles from New York City.



Holyoke is a densely populated city of approximately 23 square miles, with most of its approximately 40,000 residents in the urban core, industrial, commercial and suburban half of the City between the river and mountain range.

Before European settlement, the area that eventually became the City of Holyoke was used by Native Americans of the Algonquin and Iroquois tribes for hunting and fishing. Holyoke was first settled in 1745 and was officially incorporated as a town in 1850 and later as a city in 1873.



Aerial View of Holyoke, MA

Photo by J. Guy Gaulin

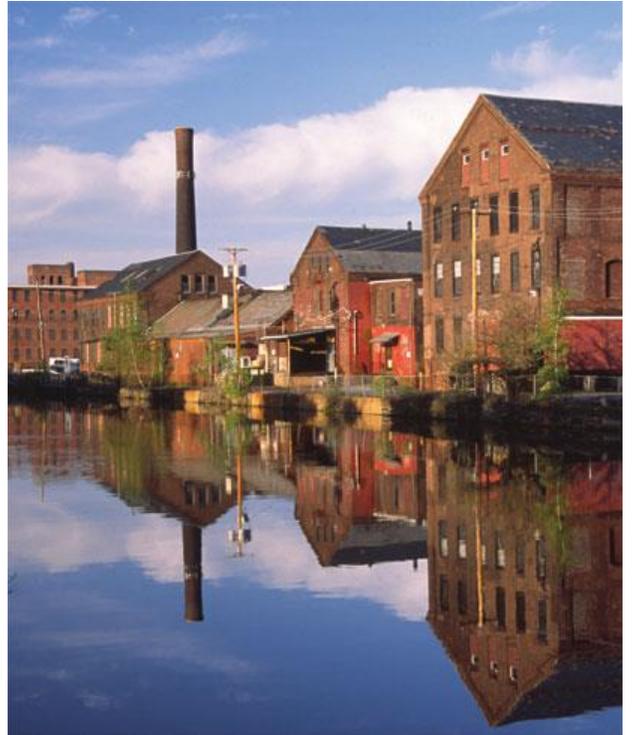
The first of several dams was constructed in 1848 by a group of wealthy Boston businessmen to take advantage of a 57-foot drop in the river level. The water power created by the dam was transferred to planned industrial sites through an extensive series of 3 level canal systems of 7.5 miles of hand dug canals and raceways to

bring that power to machine mills and factories. The businessmen also planned and built a system of gridded streets, factory worker housing and building lots for grander homes for factory owners, giving Holyoke the moniker of being the first planned industrial city in America. At one point, more than 25 paper mills were in operation in Holyoke, annually producing the greatest tonnage of paper of any city in the world giving the city its nickname of "Paper City". During the 1900's, there were more millionaires per capita in Holyoke than anywhere else in the country. Although there are no longer any paper manufacturers, the dam, canals and much of the industrial and commercial architecture remain intact. The history of paper related manufacturing continues with a strong base of paper converting in place of the former paper manufacturing. Today, Holyoke continues to strongly reflect its industrial history with many of the mills and associated housing still standing in and near downtown. In addition to the industrial hometown, Holyoke also has a reservoir system that is home to much of the Mt. Tom range and home to other natural assets. Today over 60% of the energy used in the city still comes from hydro power, now a state-of-the-art dam system on the river.

Because of the growth of industry, Holyoke's population grew by over 100 percent between 1860 and 1880 and was established by working-class immigrants, where the first wave of mill workers was

predominantly of Irish heritage. Immigrant populations continued with significant populations of French Canadian, Polish, German, and most recently a wave of migrant population from Puerto Rico since the 1970's. As of the 1970 Census, only 3.7% of Holyoke's population was of Puerto Rican heritage, while today nearly half of Holyoke's population is of Puerto Rican heritage, creating a rich culture and a unique asset to have the highest percentage of Puerto Rican population in any City outside of Puerto Rico itself.

Holyoke is also in close proximity to over 30 colleges and universities that produce a talented and qualified workforce for prospective employers in the Pioneer Valley. In addition to excellent access to major highways and academic institutions, Holyoke offers existing infrastructure, affordable housing costs, a growing workforce, convenient highway access, freight rail service, passenger rail connection under design, and business development incentives.



## Operating Budget Development Process

Holyoke Public Schools' annual budgeting process is the mechanism by which the District's priorities are formulated and resources are allocated. By strategically aligning District goals with financial and human resource goals, the District is making a direct commitment to attaining those goals.

In the first full budget year of the receivership, the District altered the entire budget development process. Continuous improvements have been made to the budget development process, by increasing the transparency and organization-wide collaboration. These improvements have allowed the District to invest strategically and improve the quality of service provided to the students.

### **PLANNING & STRATEGY PHASE**

The planning and strategy phase of the budget development process is critical to the overall preparation of the budget. Without proper planning and strategic vision, the operating budget will lack the efficiency and effectiveness needed to make the decisions of investing the District's limited resources.

Starting in early November, the Budget Team creates a budget calendar, listing activities and key dates necessary to develop the budget. The budget calendar is an essential part of the budgeting process as it communicates the overall project timeline as well as critical deadlines needed to meet the overall timeline.

Projections and assumptions crucial to the budgeting process are developed. These include program changes, contract increases, enrollment projections, and anticipated funding levels that are used to compile a preliminary budget projection. This gives administration an early look at potential challenges to be faced in the coming months.

### **BUDGET DEVELOPMENT PHASE**

The budget development phase is the alignment of the District's strategic priorities and objectives with the resources necessary to attain them. During this time, the Budget Team distributes information necessary to facilitate the budget process to all departments. Departments then return their funding requests with their needs and priorities for the upcoming year. The departments are also asked to provide specific areas where they would potentially make cuts, should the economic climate warrant the need. It is important to understand that as 87.8% of the District's general funds budget comes from State aid, we must closely follow the State's budget process and timeframe.

As the Budget Office compiles departmental requests along with other district-wide costs and forecasted revenues, a budget projection that specifically identifies the District's budget deficit is formed. Working to balance the budget, we analyze departmental submissions for inefficiencies, inaccuracies, and faulty assumptions. We then examine other areas of the budget where cuts, efficiencies or revenues can be realized, and present them to the Superintendent and his other district leaders for review and recommendations. The goal is to balance the budget with minimal impact to classrooms and instruction and to make strategic investments that will accelerate learning outcomes for students. Schools are then

given a core staff allocation based on the student demographic and enrollment in their school. Additionally, principals are allocated a per pupil amount that is equitable across all schools. This per pupil amount is used to develop specific spending plans as determined by the Principals and approved by their school supervisor and ultimately, the Superintendent. Each principal is given the autonomy to use their per pupil allocation and develop a spending plan that meets the needs of their student population. The per-pupil amount allocated is used to fund additional staffing, classroom supplies, and other school-based services.

## **BUDGET PROJECTIONS**

Through all four phases of the budget process, the Budget Team tracks and releases budget projections to show stakeholders where the District fiscally stands. Four major status updates are released at different stages of the process. They are:

1. **Initial Projection:** An initial projection of next year's budget is developed during the Planning and Strategy Phase in November or December. Since most major assumptions are unknown at this point, conservative assumptions are used. This "worst-case scenario" projection allows the District to begin planning potential contingencies. Please note that for this budget we did not present the initial projection because the initial projection was completed after the Governor released his budget.
2. **Governor's Budget:** In late January during the Development Phase, the Governor released his recommended budget for the following year. Since the majority of the assumptions in the general fund budget rely on the State budget, this projection gives stakeholders a better idea of the District's financial status.
3. **Level Service Budget:** Each year, Chiefs and schools are asked to submit a level service budget. These budget requests are compiled to establish a baseline for the budget. The level service projection demonstrates the true budget gap. In addition to the Chief budget requests, the District also compiles all of the school staffing allocations which take up the majority of the budget. The staffing allocations project next year's enrollment and sets staffing and spending at the school level. This school year the level service budget was released using House Ways and Means revenue info.
4. **Final Balanced Budget:** To begin the Adoption Phase, when the budget is finally balanced, a balanced budget projection is released. This projection includes all cuts, additions, and assumption changes that were made to the level service budget.

## **BUDGET ADOPTION PHASE**

After the operating budget is balanced, the Superintendent's budget is then presented to the School Committee. Additionally, the budget is also presented to the Mayor as part of the City budget process. During this time, if the State legislature decides to change the revenue amounts from original recommendations or the District's expenditure assumptions change, additional meetings are held to adjust the proposed spending plan. After final revisions are made, the budget is officially adopted by the

Superintendent, and then submitted to the City to be combined with the overall budget for adoption by the City Council.

## **BUDGET MONITORING**

Budgeting is a cyclical process that never ends. After plans are made, the budget's accounts are maintained and monitored. Departments and schools enter orders which coincide with the programs and plans reflected in their budgets. If plans change or grants are added, there may be the need to reclassify expenses or transfer funds between various accounts. To help budgets stay in line with appropriations, analysts meet with Chiefs, department heads, and principals on a regular basis to review spending activity. Up until close of the fiscal year, accounts must be monitored for surpluses and deficits to ensure that all funds are spent according to plans.

## **OVERVIEW OF THE STATE BUDGET PROCESS**

The majority of the assumptions in the general fund budget rely on the State budget, therefore the District is dependent on this process in order to determine our budget. Below is an overview of the State budget process.

### **Summary of the steps in the budget process:**

#### **Step 1: Governor's Budget**

The budget begins as a bill that the Governor submits in January (or February if at the start of a new term) to the House of Representatives.

#### **Step 2: House Ways & Means Budget**

The House Ways and Means Committee reviews this budget and then develops its own recommendation.

#### **Step 3: House Budget (Mid-April)**

Once debated, amended and voted on by the full House, it becomes the House budget bill.

#### **Step 4: Senate Ways & Means Budget**

At this point, the House passes its bill to the Senate. The Senate Ways & Means Committee reviews that bill and develops its own recommendation.

#### **Step 5: Senate Budget (Mid to Late May)**

Once debated, amended and voted on, it becomes the Senate's budget bill.

#### **Step 6: Conference Committee Budget (June 30th usually)**

House and Senate leadership then assign members to a joint "conference committee" to negotiate the differences between the House and Senate bills. Once that work is completed, the conference committee returns its bill to the House for a vote. If the House makes any changes to the bill, it must return the bill to the conference committee to be renegotiated. Once approved by the House, the budget passes to the Senate, which then votes its approval.

**Step 7: Vetos**

From there, the Senate passes the bill to the Governor who has ten days to review and approve it, or make vetoes or reductions. The Governor may approve or veto the entire budget, or may veto or reduce certain line items or sections, but may not add anything.

**Step 8: Overrides**

The House and Senate may vote to override the Governor's vetoes. Overrides require a two-thirds majority in each chamber.

**Step 9: Final Budget**

The final budget is also known as the General Appropriations Act or "Chapter *nnn* of the Acts of 20xx." The final budget consists of the Conference Committee version, minus any vetoes, plus any overrides.

## Holyoke Public Schools Projected FY2023 Budget

	Final State Budget FY2022	1/27/22 Governors Budget FY2023	3/18/22 Level Service Budget FY2023	Final Proposed FY2023	\$ change	% change
<b>REVENUES</b>						
Chapter 70 State Aid	82,853,878	89,770,485	89,770,485	89,770,485	6,916,607	8.3%
Holyoke Required Local Contribution	11,380,266	11,842,864	11,842,864	11,842,864	462,598	4.1%
<b>Required Net School Spending</b>	<b>94,234,144</b>	<b>101,613,349</b>	<b>101,613,349</b>	<b>101,613,349</b>	<b>7,379,205</b>	<b>7.8%</b>
City Admin NSS (Admin and Parks)	(148,400)	(148,400)	(148,400)	(148,400)	0	0.0%
Charter Tuition reimbursement	1,271,241	2,939,706	2,939,706	2,603,229	1,331,988	104.8%
<b>Adjusted Net School Spending</b>	<b>95,356,985</b>	<b>104,404,655</b>	<b>104,404,655</b>	<b>104,068,178</b>	<b>8,711,193</b>	<b>9.1%</b>
Transportation (Including Xng Guards)	9,073,384	9,234,195	9,150,311	8,999,967	(73,417)	-0.8%
Leases not eligible for NSS	190,000	240,470	237,071	237,071	47,071	24.8%
Medicaid	100,000	100,000	100,000	100,000	0	0.0%
<b>Total General Fund Budget</b>	<b>104,720,369</b>	<b>113,979,320</b>	<b>113,892,037</b>	<b>113,405,216</b>	<b>8,684,847</b>	<b>8.3%</b>
Supplemental Funding	3,574,103	2,857,970			(3,574,103)	-100.0%
<b>TOTAL OPERATING REVENUE</b>	<b>108,294,472</b>	<b>116,837,290</b>	<b>113,892,037</b>	<b>113,405,216</b>	<b>5,110,744</b>	<b>4.7%</b>
<b>EXPENSES</b>						
Salaries	52,696,086	57,330,890	56,176,514	56,596,915	3,900,829	7.4%
Supplies & Services	9,601,215	9,889,251	9,426,318	9,158,750	(442,465)	-4.6%
<b>Total Discretionary Expenses</b>	<b>62,297,301</b>	<b>67,220,142</b>	<b>65,602,832</b>	<b>65,755,665</b>	<b>3,458,364</b>	<b>5.6%</b>
<i>Health &amp; Life Insurance</i>	<i>7,816,935</i>	<i>8,364,337</i>	<i>8,364,337</i>	<i>8,008,164</i>	<i>191,229</i>	<i>2.4%</i>
<i>Retirement non teachers</i>	<i>2,233,693</i>	<i>2,270,407</i>	<i>2,270,407</i>	<i>2,270,407</i>	<i>36,714</i>	<i>1.6%</i>
Retired Teachers Health assessment	3,877,760	3,806,731	3,806,731	3,806,731	(71,029)	-1.8%
Charter Tuition/School Choice	14,425,080	16,339,388	16,339,388	16,003,148	1,578,068	10.9%
Other Benefits	511,000	511,000	511,000	511,000	0	0.0%
Unemployment	600,000	600,000	300,000	300,000	(300,000)	-50.0%
Utilities	2,573,418	2,650,621	2,605,418	2,613,418	40,000	1.6%
Out of District Tuition	4,703,299	5,500,000	4,704,542	4,899,645	196,346	4.2%
<b>Total Non-Discretionary Expenses*</b>	<b>36,741,185</b>	<b>40,042,483</b>	<b>38,901,822</b>	<b>38,412,513</b>	<b>1,671,328</b>	<b>4.5%</b>
Non-NSS (Transportation, Adult Ed, Leases)	9,255,986	9,574,665	9,387,382	9,237,038	(18,948)	-0.2%
<b>Sub-Total Operating Budget Expenses</b>	<b>108,294,472</b>	<b>116,837,289</b>	<b>113,892,037</b>	<b>113,405,216</b>	<b>5,110,744</b>	<b>4.7%</b>
					0	
<b>TOTAL EXPENSES PROJECTED</b>	<b>108,294,472</b>	<b>116,837,289</b>	<b>113,892,037</b>	<b>113,405,216</b>	<b>5,110,744</b>	<b>4.7%</b>

# Operating Budget Calendar

## DECEMBER

- Initial budget planning and allocation planning meetings are held.
- Current year budget projections updated.
- Initial budget outlook to the Superintendent.
- Bi-monthly meetings are held with Chiefs and department heads to review current year budget.

## JANUARY

- Memo of FY 2023 budget instructions and budget reductions are sent out to all Chiefs and Principals.
- First meeting with cabinet is held to initiate the FY 2023 budget request.
- The Governor's FY 2023 (House I) proposed budget is announced and analyzed
- Bi-monthly meetings are held with school principals to review current year budget.

## FEBRUARY

- FY 2023 budget requests are submitted by each cabinet chief.
- Budget team begins vetting budget requests and second meetings are held with appropriate budget managers.
- Targeted reductions to original budget requests are submitted.
- School-based staffing allocations are completed.
- Analyzing of budget requests continue.
- Presentation to School Committee of preliminary budget deficit.
- Final budget review meetings are held with all Chiefs and Superintendent.
- Bi-monthly meetings are held with Chiefs and department heads to review current year budget.

## MARCH

- Budget update provided to receiver and school committee based on updated assumptions.
- School Supervisors meet with school principals to support individual school budget planning.
- Meetings are held with Chiefs to review current year budget.

## APRIL

- House of Representatives Ways and Means Committee (House II) releases budget in early April.
- Meetings are held with Chiefs and department heads to review current year budget.
- School Supervisors meet with school principals to support individual school budget planning.

## Operating Budget Calendar (Continued)

### MAY

- Senate releases budget
- Meetings are held with school principals, school supervisors and Chiefs to review current year budget.

### JUNE

- Potential changes to budget appropriation made based on the State's final adopted budget.
- School Committee and Public Hearing on the budget is held
- City Council hearings on City departmental budgets.
- Mayor submits recommended budget to City Council
- Superintendent approves budget
- Bi-monthly meetings are held with Chiefs and department heads to review current year budget.

### JULY

- Send communication to all departments regarding their approved FY 2023 budget.
- Debriefing on the FY 2023 budget to be held.
- Meetings are held with school principals, school supervisors and Chiefs to review current year budget.

### AUGUST

- Regular meetings are held with Chiefs and department heads to review current year budget.

### SEPTEMBER

- Regular meetings are held with school principals, school supervisors and Chiefs to review current year budget.

### OCTOBER

- October 1<sup>st</sup> student enrollment numbers posted by the Department of Elementary and Secondary Education.
- Preliminary FY 2023 school-based staffing allocation adjustments made.
- Regular meetings are held with Chiefs and department heads to review current year budget.

### NOVEMBER

- Preliminary FY 2023 budget projection completed.

## Operating Budget Calendar (Continued)

- The Budget Team begins developing plans and communications for FY 2023 budget.
- Regular meetings are held with school principals, school supervisors and Chiefs to review current year budget.

## Holyoke Public Schools General Fund Appropriation Overview

According to Massachusetts General Law, the Holyoke Public Schools District is a fiscally dependent entity organized under the City of Holyoke and therefore does not have the authority to tax, issue bonds, or incur debt. The majority of the District's general fund budget comes from state aid (88.3%), which is combined with local funds and appropriated by the City. Because of the significant amount of state funds, each year the City waits for the decision for funding from the State and then provides its required contribution.



Holyoke Public Schools' general fund budget contains the day-to-day costs of providing preschool through 12<sup>th</sup> grade and adult educational programs (including transitions). Although there are mandates and minimum requirements as to how the funds can be used, the general fund is for the most part unrestricted, and used to support the goals and initiatives valued by the District. The restrictions that most apply to Holyoke when discussing Net School Spending are:

1. Transportation
2. Adult Education
3. Leases greater than 3 years' old
4. Capital Improvements exceeding \$150,000
5. Long term debt payments

## CHAPTER 70, FOUNDATION BUDGET, AND NET SCHOOL SPENDING

Chapter 70 is the Massachusetts General Law that establishes funding requirements for public school districts within the State. The law establishes a minimum funding requirement or “foundation budget,” for each district that seeks to ensure an adequate education consistent with the Education Reform Act of 1993. The law also defines the payments that make up the foundation budget. The State uses a complex formula to calculate an adequate funding level, which is based on many factors including each district’s student demographics. Then, taking into account the community’s wealth, the formula calculates the City’s required “local contribution” (the amount the municipality can afford). For FY 2023 this amount is \$11.8 million. The State then funds the remaining amount with Chapter 70 Aid, which for FY 2023 is \$88.3 million. Below is a list of cities with the lowest local contribution in the state in 2022.

<b>Cities with the Lowest Local Contribution in the State of MA</b>					
<b>District</b>	<b>Enrollment</b>	<b>Required Net School Spending</b>	<b>Local Contribution</b>	<b>State Aid</b>	<b>% Local Contribution</b>
Lawrence	14,593	\$253,714,475	\$13,007,684	\$240,706,791	5.1%
Springfield	28,613	\$483,882,872	\$44,717,025	\$439,165,847	9.2%
<b>Holyoke</b>	<b>6,033</b>	<b>\$101,613,349</b>	<b>\$11,842,864</b>	<b>\$89,770,485</b>	<b>11.7%</b>
New Bedford	14,011	\$233,389,315	\$34,303,277	\$199,086,038	14.7%
Chelsea	7,089	\$125,093,688	\$20,484,593	\$104,609,095	16.4%
Athol Royalston	1,759	\$25,100,228	\$4,138,714	\$20,961,514	16.5%
Greater Lawrence	1,665	\$39,053,523	\$6,645,884	\$32,407,639	17.0%
Fall River	12,103	\$204,753,290	\$36,332,032	\$168,421,258	17.7%
Brockton	16,975	\$276,250,953	\$52,190,600	\$224,060,353	18.9%
Lynn	17,808	\$299,740,597	\$57,821,484	\$241,919,113	19.3%

## Ch. 70 Aid + Local Contribution = Required Net School Spending

Also included in Chapter 70 is the calculation for meeting “net school spending,” or the minimum amount that a municipality and school district must spend on education during the fiscal year. Required net school spending is the sum of Chapter 70 aid and the required local contribution as determined by the Department of Elementary and Secondary Education (DESE). Below is the preliminary net school spending (NSS) requirement for FY 2023 as well as a trend for the last 5 years. Final numbers are determined upon approval of the State budget.

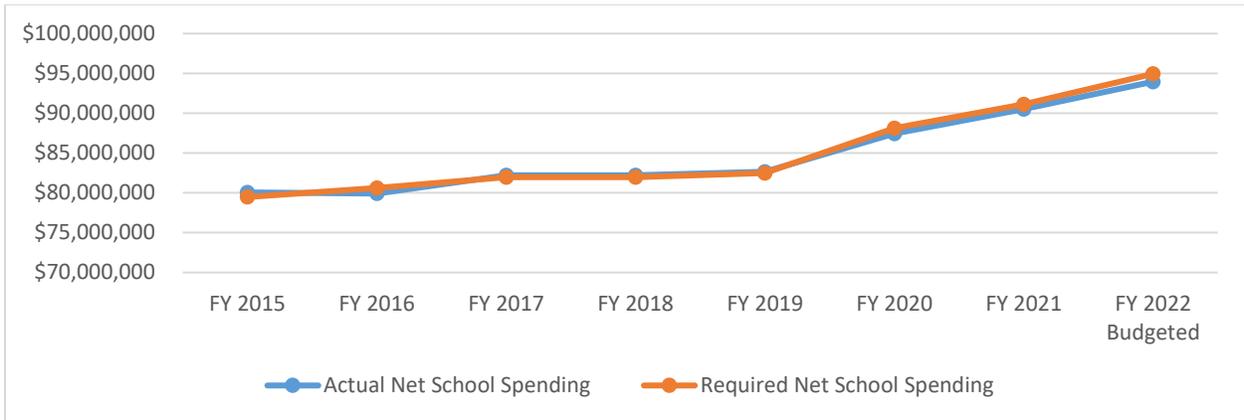
Net School Spending Requirement						
	<u>FY2023</u>	<u>FY2022</u>	<u>FY2021</u>	<u>FY2020</u>	<u>FY 2019</u>	<u>FY 2018</u>
Enrollment	6033	6159	6357	6330	6330	6463
Required District Contribution	\$ 11,842,864	\$ 11,380,266	\$ 11,207,668	\$ 11,074,770	\$ 10,886,435	\$ 10,580,654
Chapter 70 Aid	\$ 89,770,485	\$ 82,852,757	\$ 78,953,361	\$ 75,731,000	\$ 71,590,427	\$ 71,400,527
<b>Required Net School Spending</b>	<b>\$ 101,613,349</b>	<b>\$ 94,233,023</b>	<b>\$ 90,161,029</b>	<b>\$ 86,805,770</b>	<b>\$ 82,476,862</b>	<b>\$ 81,981,181</b>

## Holyoke Public Schools - Actual Net School Spending

Historically, the Holyoke Public School spending has met or exceeded the net school spending requirement consistently over the years but these past couple of years we have failed to meet net school spending. In FY 2016, the District was forced to solve a \$1 million budget shortfall in transportation. Because resources were drained from educational budget line items that count towards the net school spending requirement, and instead were redirected to cover the transportation deficit, the City did not meet its net school spending requirement in that year.

Every year, the District develops a budget at the minimum net school spending required amount. Because the school department is allowed to carryover any unspent funds from the previous year, this has allowed the schools to spend above the net school-spending amount in some years. The City always intends to budget at the minimum net school spending requirement but changes in the cherry sheet assessments affect whether it is met or not. This was the case in FY 2020 where our initial appropriation was appropriate to meet NSS but changes in the Cherry Sheet assessments put us below the minimum requirement. The FY 2023 appropriation is right at the minimum amount required. Below is a trend of the Holyoke Public Schools net school spending requirement and actual net school spending requirement based on information obtained on the DESE website:

	<u>FY 2015</u>	<u>FY 2016</u>	<u>FY 2017</u>	<u>FY 2018</u>	<u>FY 2019</u>	<u>FY 2020</u>	<u>FY 2021</u>	<u>FY 2022</u> <u>Budgeted</u>
Actual Net School Spending	\$80,057,058	\$79,912,931	\$82,210,809	\$ 82,218,823	\$ 82,651,354	\$ 87,425,054	\$ 90,516,999	\$ 93,956,262
Required Net School Spending	\$79,477,472	\$80,596,955	\$81,962,117	\$ 81,981,181	\$ 82,476,862	\$ 88,111,146	\$ 91,113,919	\$ 94,944,262
Amount Over / (Under) NSS	\$579,586	(\$684,024)	\$248,692	\$237,642	\$174,492	(\$686,092)	(\$596,920)	(\$988,000)



## BUDGETARY APPROPRIATION

Holyoke Public Schools’ general fund budget appropriation is based on the formula shown below. The process begins by taking the Department of Elementary and Secondary Educations (DESE) net school spending (NSS) requirement and reducing it by “Schedule 19,” a DESE allowable charge for indirect costs of City administrative services provided to the District (Treasury, Procurement, Auditor, and Maintenance of school parks). In order to meet the minimum net school spending requirement, the District then adds any projected Charter Reimbursement based on the latest Cherry Sheet available from the State. This is the adjusted net school spending requirement. To arrive at the District’s total appropriation, the funding of the adult education program, leases greater than three years old, and costs of providing students with transportation to and from school are added. These amounts are broken out because expenditures for these do not count towards the expenditures required to meet net school spending, and are therefore appropriated in addition to the net school spending budget.

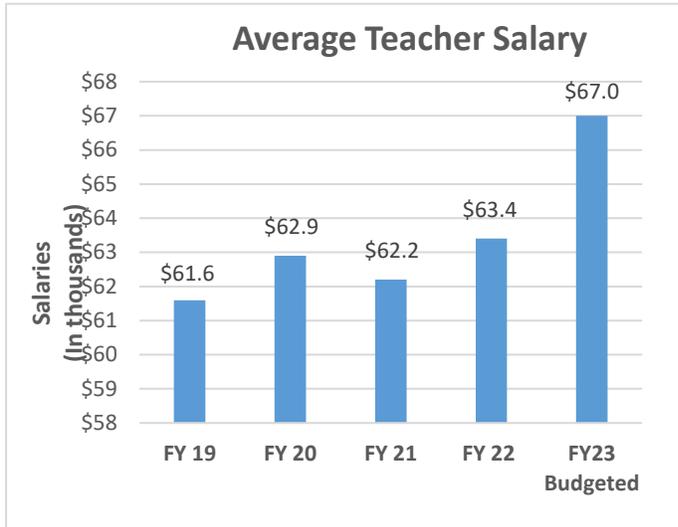
	FY2022 Final State Budget	FY2023 Final Proposed	<i>\$ change</i>	<i>%Change</i>
Required Net School Spending	94,234,144	101,613,349	7,379,205	7.8%
Subtract Payment for City Admin.	-148,400	-148,400	0	0.0%
Add Charter Reimbursement	1,271,241	2,603,229	1,331,988	104.8%
<b>Adjusted NSS Subtotal</b>	<b>95,356,985</b>	<b>104,068,178</b>	<b>8,711,193</b>	<b>9.1%</b>
Transportation (Including Xng Guards/Mon)	9,073,384	8,999,967	-73,417	-0.8%
Leases	190,000	237,071	47,071	24.8%
Medicaid processing	100,000	100,000	0	0.0%
<b>Total School Appropriation</b>	<b>104,720,369</b>	<b>113,405,216</b>	<b>8,684,847</b>	<b>8.3%</b>
<b>Total Operating Budget</b>	<b>104,720,369</b>	<b>113,405,216</b>	<b>8,684,847</b>	<b>8.3%</b>
<b>Below Expenses are NSS Eligible in Other City Budgets</b>				
Insurance / Benefits	7,816,935	8,008,164	191,229	2.4%
Retirement	2,233,693	2,270,407	36,714	1.6%
<b>Total Expenses in Other City Budgets</b>	<b>10,050,628</b>	<b>10,278,571</b>	<b>227,943</b>	<b>2.3%</b>
<b>Net School Budget Appropriation</b>	<b>94,669,741</b>	<b>103,126,645</b>	<b>8,456,904</b>	<b>8.9%</b>

Historically, the City has also budgeted other items that qualify for net school spending in other budgets outside of the school department appropriation. These costs are Fringe Benefits. In order to arrive at the school department appropriation, these costs are backed out of the total operating budget. Although our required net school spending increased, more than \$1.6 million of the increase was due non-discretionary

costs, principally an increase in charter school tuition and school choice. When adjusted, the overall school department appropriation was increased by \$8,456,904 to \$103,126,645.

Many Districts choose to spend more than their required spending level. Based on the legal requirements and restrictions established with the foundation budget and minimum net school spending requirements, the school department is not allowed to include the Central Office lease payments, Transitions Academy lease payments, transportation costs, adult education costs, or long-term debt payments in the amount required to meet the minimum net school spending baseline. Those costs are in addition to the net school spending appropriation and must be funded by the City. Failure to meet the net school spending requirement will be determined by completion of the End of Year Financial Report and there is a compliance mechanism in place with fiscal penalties for districts not meeting the minimum requirement.

## MAJOR BUDGET COST DRIVERS

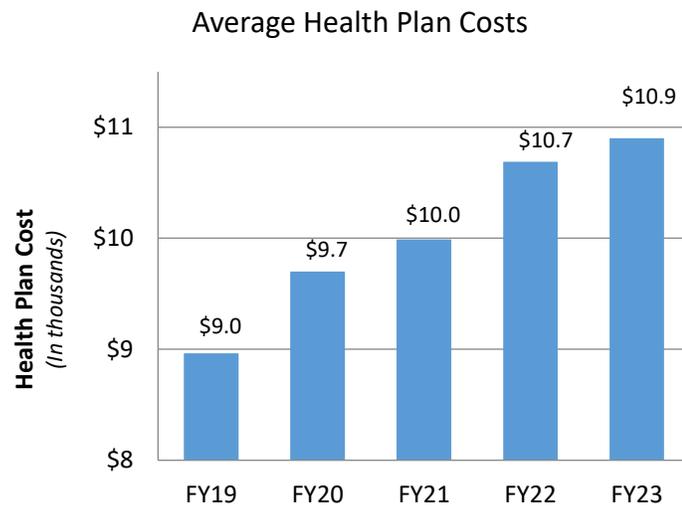


Often spoken about as major forces driving the District’s budget increase each year are the areas of employee compensation, employee benefits (such as health insurance, retirement, accrued sick and vacation time, and retiree health benefits), charter tuition / school choice, and special education out-of-district tuition. The reason that these expenses are cost-drivers is because they are significant in value and even slight increases have a big impact on the overall budget. In most cases, they are legally required. In FY 2023, we will continue our investment of a

performance-based compensation system that rewards our most talented educators.

## EMPLOYEE HEALTH INSURANCE

Holyoke Public Schools covers up to 73% of the total cost of all full-time employee healthcare premiums. As shown on the graph, average health plan costs in the City will again rise for FY 2023. This puts a strain on the budget. In addition to changes in premiums, future growth in total health insurance costs will also be impacted by expected personnel changes, such as an increase in the number of retirees, an increase in staff due to enrollment changes and program adjustments, and other fluctuations. For FY 2023, \$11.8 million has been budgeted in the general fund for current and retiree health insurance premiums.



## RETIREE COSTS AND UNEMPLOYMENT

For FY 2023 there is expected to be an increase in retirement costs of \$36,714. Pension costs will climb as people live longer, healthier lives but the majority of the schools employees are in the Mass Teachers Retirement System. According to the U.S. Census Bureau, the average life expectancy in 2010 was 78.3

years, which is up by 10.6% over the past 40 years. On average, Holyoke Public Schools' pays over \$365,000 per month for retiree health insurance premiums, which equates to \$4.4 million per year. Unemployment costs are projected to decrease by \$300,000.

### OUT OF DISTRICT TUITION

Twenty-eight percent of the Districts students are considered students with learning disabilities. Some of the needs of these students are so severe that the District cannot meet their learning needs and these students receive services in out of District placements. Unfortunately, the funding that we receive from the state for these students is not adequate to cover the costs. In 2023 the District is estimating it will spend \$9.5 million in out of district costs and the funding provided by the state is short by \$4.8 million as depicted in the trend analysis below.

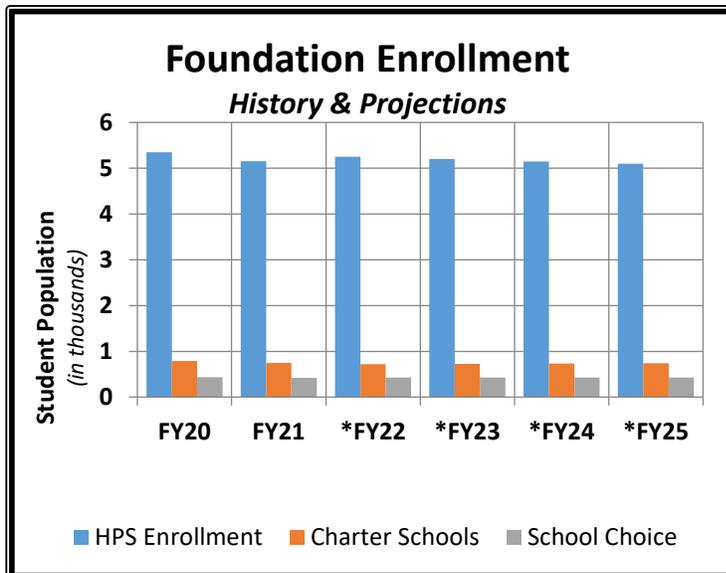
### OOD LEGACY COSTS

	FY19	FY20	FY21	FY22	FY23
Out of District Tuition	\$ 7,200,000	\$ 8,200,000	\$ 8,700,000	\$ 8,900,000	\$ 9,500,000
Ch 70 Revenue	\$ (1,589,265)	\$ (1,738,013)	\$ (1,831,112)	\$ (1,793,984)	\$ (1,886,004)
Circuit Breaker Revenue	\$ (1,400,000)	\$ (2,063,000)	\$ (2,063,000)	\$ (2,365,374)	\$ (2,774,563)
<b>TOTAL NET OOD Unfunded</b>	<b>\$ 4,210,735</b>	<b>\$ 4,398,987</b>	<b>\$ 4,805,888</b>	<b>\$ 4,740,642</b>	<b>\$ 4,839,433</b>

### CHARTER SCHOOL TUITION / SCHOOL CHOICE

As an urban school district, Holyoke Public Schools has a transient population. This characteristic makes it quite difficult to accurately track and project student enrollment between schools. Although the task can be difficult, estimating student enrollment is a critical function necessary for the District to appropriately staff buildings and project funding.

### FOUNDATION ENROLLMENT



Foundation enrollment is a count of the number of pupils for whom a school district is financially responsible on October 1<sup>st</sup> of any given year. It is comprised primarily of local resident school children attending their community's local or regional school district. However, it also includes students for whom the District is paying tuition, such as those at Commonwealth Charter Schools, other school districts (school choice), special education schools, and other settings. In order to be included, a student must be officially enrolled on October 1<sup>st</sup>. Those who leave in September or arrive after October 1<sup>st</sup> are not counted. A

student who happens to be absent on October 1<sup>st</sup> is included nonetheless; this is a measure of enrollment, not attendance. DESE computes foundation enrollment using pupil-specific data submitted by each district through the Student Information Management System. A district’s foundation pupil headcounts are applied to specific cost rates to arrive at the upcoming year’s foundation budget.

To forecast future enrollment, Holyoke Public Schools uses a four-year average method for both the District enrollment and enrollment at charter schools and school choice. Total foundation enrollment is the combination of all these projections. The chart shows that In-District enrollment is shrinking while enrollment in Charter and School Choice have increased over the years. If this trend continues, it puts a strain on the rest of the District budget and we are forced to make reductions in other areas to make up for the loss in revenue and increase in expenses.

	FY17	FY18	FY19	FY20	FY21	FY22	*FY23
Foundation Enrollment	6,478	6,463	6,330	6,330	6,357	6,159	6,033
Charter Schools	843	824	802	790	749	721	746
School Choice	374	390	424	433	421	445	449
Estimated In-district Enrollment	5,344	5,366	5,293	5,350	5,153	5,253	5,200
Foundation Budget Per Pupil	12,401	12,554	13,006	13,676	14,183	15,212	16,843

### ACTUAL ENROLLMENT

Actual enrollment is a headcount of students attending Holyoke Public Schools on October 1 of any given year. This enrollment differs from foundation enrollment because it only includes students in the District as opposed to all students the District is financially responsible for.

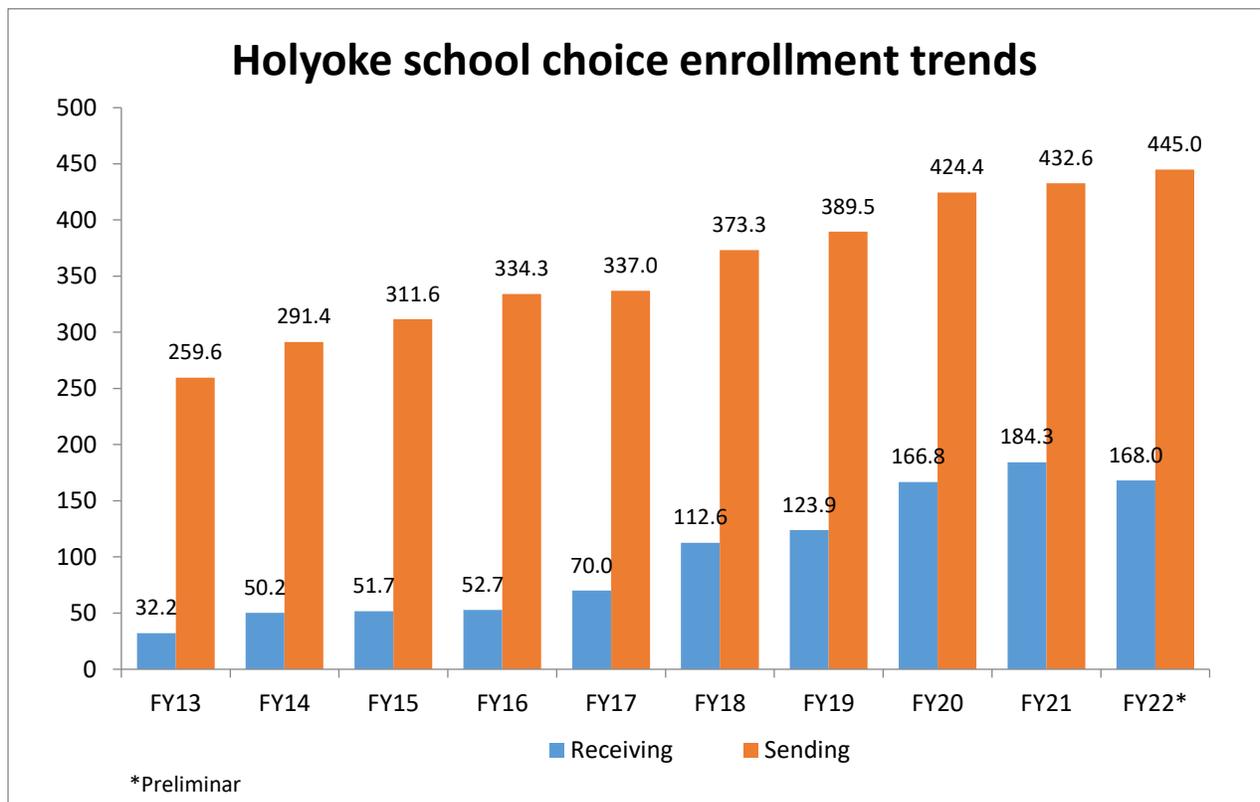
For FY 2023, the District’s foundation enrollment is 6,033, while actual enrollment in Holyoke Public Schools is estimated at 5,200. Understanding how foundation enrollment is calculated is essential to understanding school finance, specifically for Holyoke Public Schools. When students leave the District to attend a Commonwealth Charter School, they take with them all per pupil funding provided by the State. This practice adds pressure to the District’s budget. Additional school choice options at Holyoke Public Schools, such as expansion of dual language programming and the launch of new middle schools may increase enrollment as these attractive options may draw in students who were previously leaving the District for school choice and charter schools.

### SCHOOL CHOICE AND CHARTER SCHOOLS

While the District is making progress on its turnaround, we still have families that opt for their children to attend Charter schools and other Districts. The following charts show details on what charter schools some of our residents are sending their children to as well as detailed information about school choice.

### Charter School Breakout

BAYSTATE ACADEMY	1
HAMPDEN CS OF SCIENCE EAST	5
HAMPDEN CS OF SCIENCE WEST	72
HOLYOKE COMMUNITY	502
LIBERTAS ACADEMY	3
PAULO FREIRE SOCIAL JUSTICE	88
PHOENIX ACADEMY SPRINGFIELD	6
PIONEER VALLEY CHINESE IMMERSION	35
PIONEER VALLEY PERFORMING ARTS	27
SPRINGFIELD INTERNATIONAL	3
SPRINGFIELD PREPARATORY	3
VERITAS PREPARATORY	1
<b>TOTAL</b>	<b>746</b>



## Choice Out by City/Town

Receiving District	FY	FY	Change
	2020	2021	
	FTE	FTE	
Agawam	1	2	1
Amherst	6	7	1
Belchertown	5	4	-1
Chelmsford	0	1	1
Chicopee	7	6	-1
Deerfield	2	1	-1
Easthampton	74	74	0
Granby	12	14	2
Greenfield	2	3	1
Hadley	23	20	-3
Hatfield	43	40	-3
Monson	1	0	-1
Northampton	38	46	8
Southampton	24	22	-2
South Hadley	63	61	-2
Springfield	1	1	0
Westfield	26	27	1
Westhampton	0	2	2
West Springfield	4	5	1
Williamsburg	1	2	1
Amherst-Pelham	6	4	-2
Chesterfield-Goshen	0	1	1
Frontier	0	3	3
Gateway	0	1	1
Hampshire	48	54	6
Ralph C Mahar	1	1	0
Southwick-Tolland-Granville Regional School District	3	2	-1
Spencer-E Brookfield	1	1	0
Greater Commonwealth Virtual District	12	13	1
TEC Connections Academy Commonwealth Virtual School	20	27	7
<b>TOTALS</b>	<b>424</b>	<b>445</b>	<b>21</b>

As charter schools become more popular, the costs incurred by the District from these charters increases. Over the past four years, the net costs associated with charter schools and school choice has increased significantly. The City currently has 1 Commonwealth Charter School but students also elect to enroll in Charter Schools in surrounding Districts.

In the first year of a charter school's operation, the State reimburses the District 100% for charter tuition costs with Chapter 46 Aid. For the five years following the first year, the reimbursement rate is set at 25%, and then it drops to 0% in year six. Therefore, while the District's charter tuition cost is increasing, the reimbursement for this cost remains at 25% until it drops off in year six. This puts a strain on the rest of the budget.

When students leave to attend a charter school, the District is not financially burdened with the costs of educating these students, but the District is still left with legacy costs associated with retiree health insurance and pension costs. In addition, there are other legacy costs that stay with the District like utilities, the building principal, and custodians. If 20 or so students leave one of our schools to attend a Charter School, the Holyoke Public Schools still ends up paying the same amount for a principal, utilities, and the costs to clean the building. Additionally, the state has historically not funded the District 100% according to the charter reimbursement formula.

**EXPENDITURES**

The chart below depicts the breakdown of the general fund budget into \$1 investments:



	<u>Amounts per</u> <u>Dollar Spent</u>	<u>Total FY 23</u> <u>Budget</u>
Tuition (Charter, Choice, OOD)	\$0.18	\$ 20,902,793
Salaries & Benefits	\$0.63	\$ 71,493,217
Supplies and Services	\$0.08	\$ 9,158,750
Transportation and Other	\$0.08	\$ 9,237,038
Utilities	\$0.02	\$ 2,613,418
<b>TOTAL</b>	<b>\$1.00</b>	<b>\$113,405,216</b>

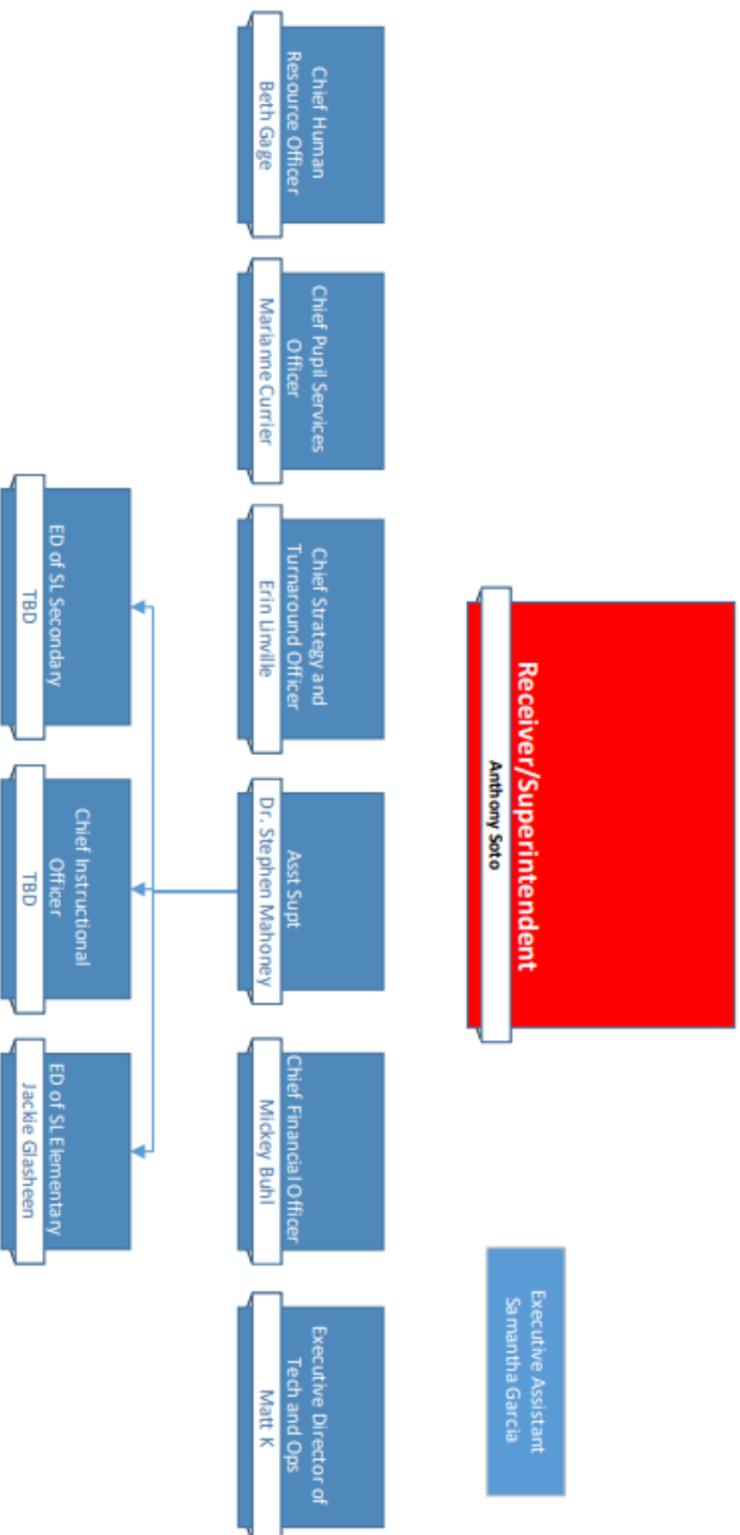
*\*Please note that OOD tuition includes SPED Out of District (OOD) tuition, Charter School Assessments, and School Choice Assessments*



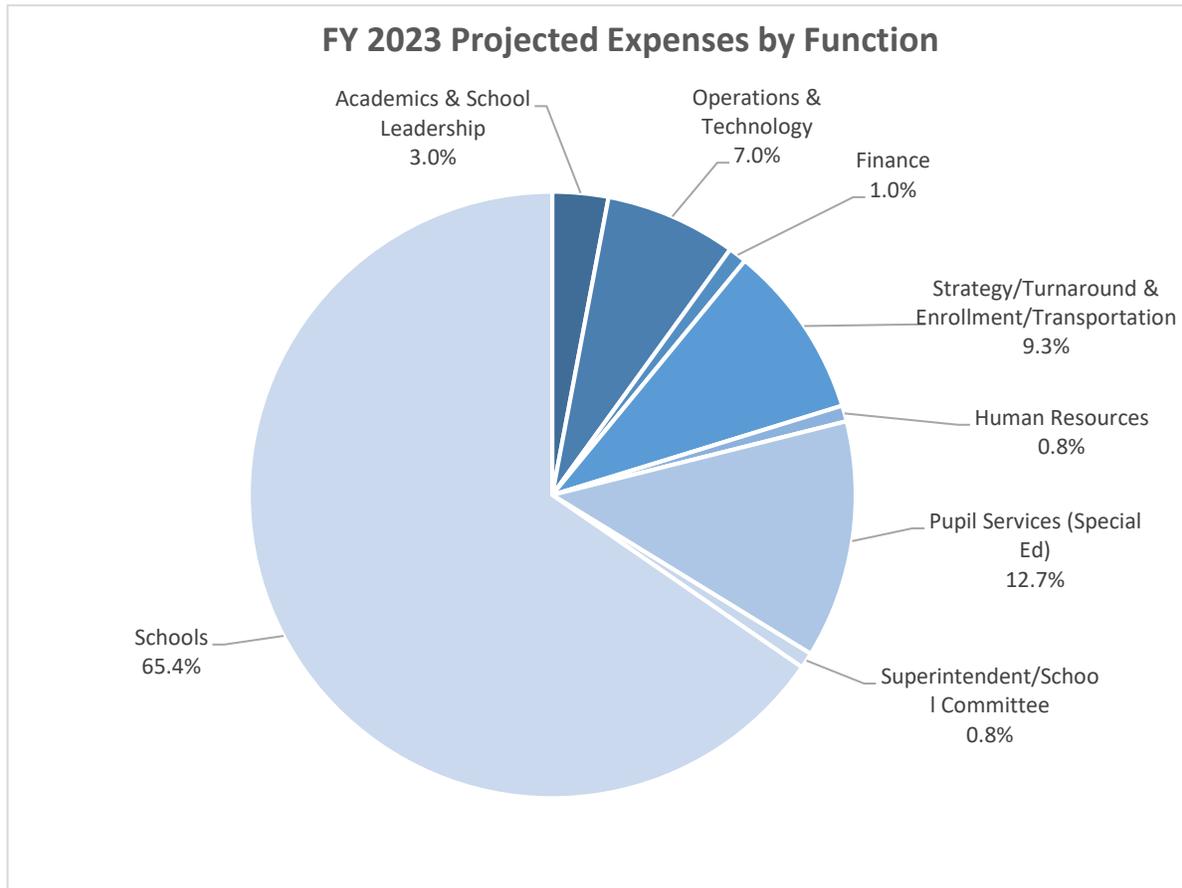
# HOLYOKE PUBLIC SCHOOLS

A PATHWAY FOR EVERY STUDENT

## Office of the Receiver / Superintendent



## General Fund – Divisional Budget



	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Academics & School Leadership	2,762,885	3,067,726	304,841	11.0%
Operations & Technology	7,093,445	7,219,035	125,590	1.8%
Finance	994,221	1,004,663	10,442	1.1%
Strategy/Turnaround & Enrollment/Transportation	9,484,365	9,582,457	98,092	1.0%
Human Resources	682,398	874,486	192,088	28.1%
Pupil Services (Special Ed)	12,332,782	13,082,933	750,151	6.1%
Superintendent/School Committee	803,624	868,994	65,370	8.1%
Schools	62,623,550	67,426,351	4,802,801	7.7%
<b>Total General Fund</b>	<b>96,777,270</b>	<b>103,126,645</b>	<b>6,349,375</b>	<b>6.6%</b>

## School Improvement & Leadership

### MISSION

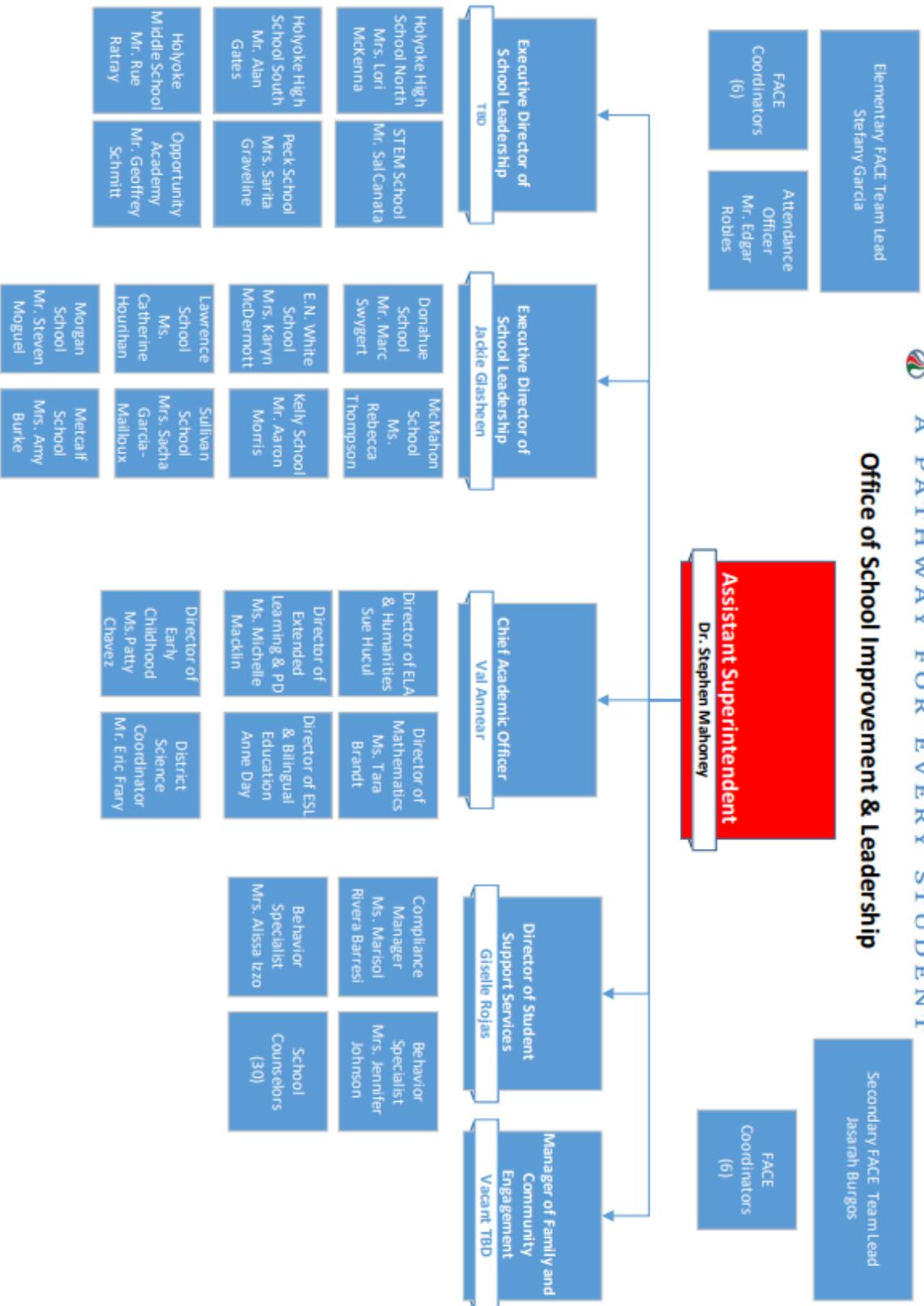
For FY 2023, two formerly separate offices – School Improvement and Leadership and Academics – are combined under the direction of the Assistant Superintendent. The move will align these two vital offices to provide consistent, coordinated support for all functions related to the teaching and learning process. The School Improvement & Leadership Office’s mission is to ensure that curriculum, instructional practices, leader and teacher development are coordinated and aligned with our Strategic Plan. Additionally, the OSIL oversees the Department of Family and Community Engagement (FACE) and the Department of Student Support Services ensuring that students and families have access to the resources and supports necessary to be successful and thrive in their educational experience.



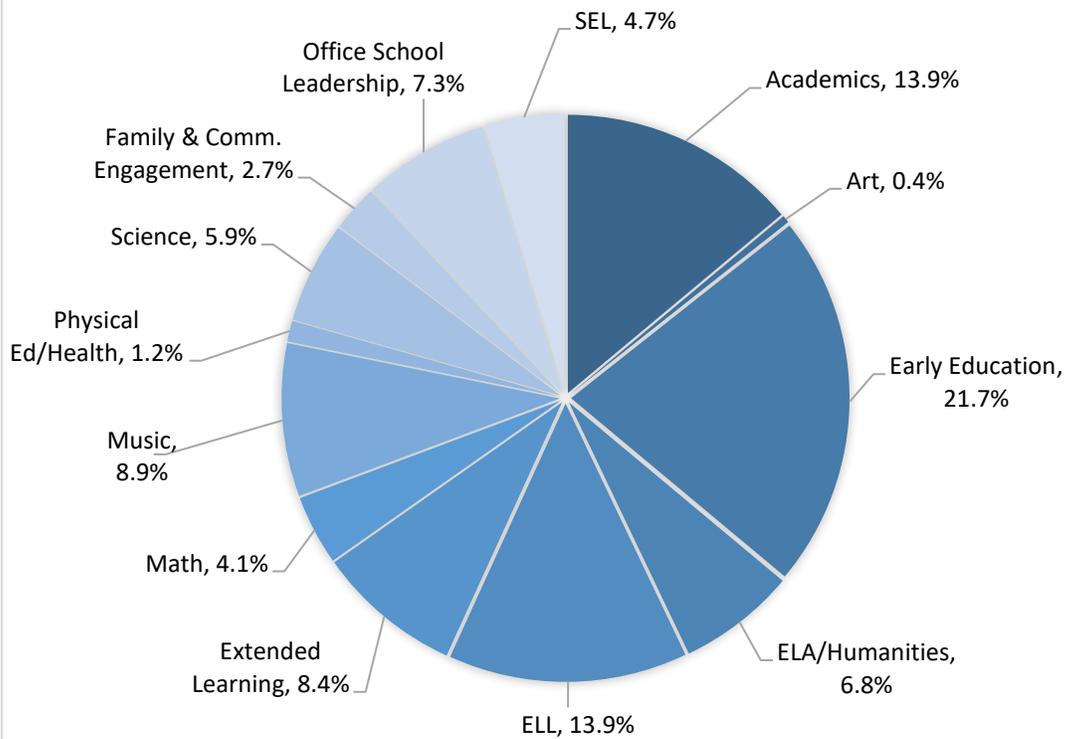
# HOLYOKE PUBLIC SCHOOLS

A PATHWAY FOR EVERY STUDENT

## Office of School Improvement & Leadership



## SCHOOL IMPROVEMENT & LEADERSHIP



	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
<b>Academics</b>	437,835	427,024	(10,811)	(2.5%)
<b>Art</b>	13,248	13,248	-	0.0%
<b>Early Education</b>	141,796	666,383	524,587	370.0%
<b>ELA/Humanities</b>	371,126	209,900	(161,226)	(43.4%)
<b>ELL</b>	349,853	425,979	76,126	21.8%
<b>Extended Learning</b>	328,905	259,031	(69,874)	(21.2%)
<b>Math</b>	206,173	124,350	(81,823)	(39.7%)
<b>Music</b>	265,539	272,754	7,215	2.7%
<b>Physical Ed/Health</b>	36,137	37,067	930	2.6%
<b>Science</b>	180,000	181,001	1,001	0.6%
<b>Family &amp; Comm. Engagement</b>	73,500	82,989	9,489	12.9%
<b>Office School Leadership</b>	154,681	225,000	70,319	45.5%
<b>SEL</b>	204,092	143,000	(61,092)	(29.9%)
<b>Total Academics &amp; School Lead.</b>	<u>2,762,885</u>	<u>3,067,726</u>	<u>304,841</u>	<u>11.0%</u>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	1,490,809	1,284,955	(205,854)	(13.8%)
Supplies & Services	1,272,076	1,782,771	510,695	40.1%
<b>Total Academics &amp; School Lead.</b>	<b><u>2,762,885</u></b>	<b><u>3,067,726</u></b>	<b><u>304,841</u></b>	<b><u>11.0%</u></b>

**Summary of FTE's for School Leadership & Improvement**

	<u>2022</u>	<u>2023</u>	<u>Change</u>
	<i>Budget</i>	<i>Budget</i>	
General Fund	16.5	14.3	(2.2)
Special Revenues	35.9	35.7	(0.2)
<b>Total FTE's</b>	<b><u>52.4</u></b>	<b><u>50.0</u></b>	<b><u>(2.4)</u></b>

## Finance

### MISSION

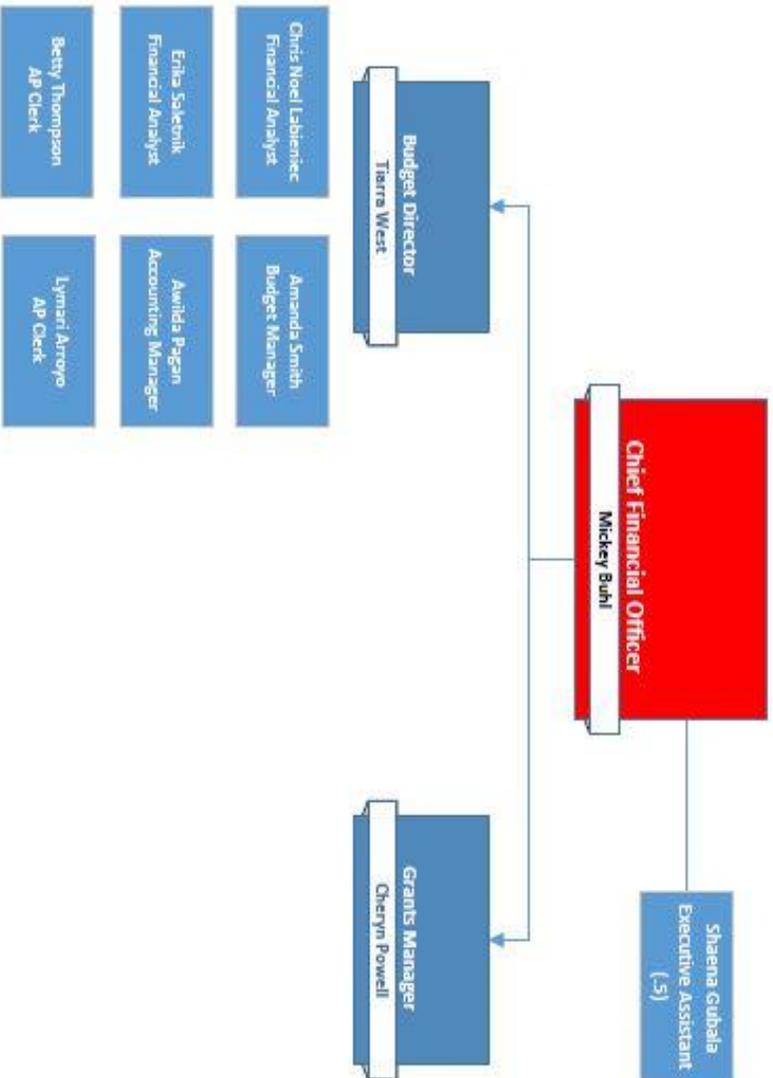
The Finance Team, under the direction of the Chief Financial Officer (CFO), and in collaboration with principals and administrative department heads, develops individual school and department budgets, which comprise the operating budget for the District; provides support and oversight; and maintains compliance with federal, state, and local laws as well as policies set by the Superintendent.



# HOLYOKE PUBLIC SCHOOLS

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## Office of Finance



## DEPARTMENT OF FINANCE

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Business Office	994,221	1,004,663	10,442	1.1%
<b>Total CFO</b>	<b><u>994,221</u></b>	<b><u>1,004,663</u></b>	<b><u>10,442</u></b>	<b><u>1.1%</u></b>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
<b>FINANCE</b>				
Personnel Services	536,130	499,103	(37,027)	(6.9%)
Supplies & Services	458,091	505,560	47,469	10.4%
<b>Total Finance</b>	<b><u>994,221</u></b>	<b><u>1,004,663</u></b>	<b><u>10,442</u></b>	<b><u>1.1%</u></b>

### Summary of FTE's for Finance

	<u>2022</u>	<u>2023</u>	<u>Change</u>
	<i>Budget</i>	<i>Budget</i>	
General Fund	7.5	7.1	(0.4)
Special Revenues	2.5	2.4	(0.1)
<b>Total FTE's</b>	<b><u>10.0</u></b>	<b><u>9.5</u></b>	<b><u>(0.5)</u></b>

## Operations and Technology

### MISSION

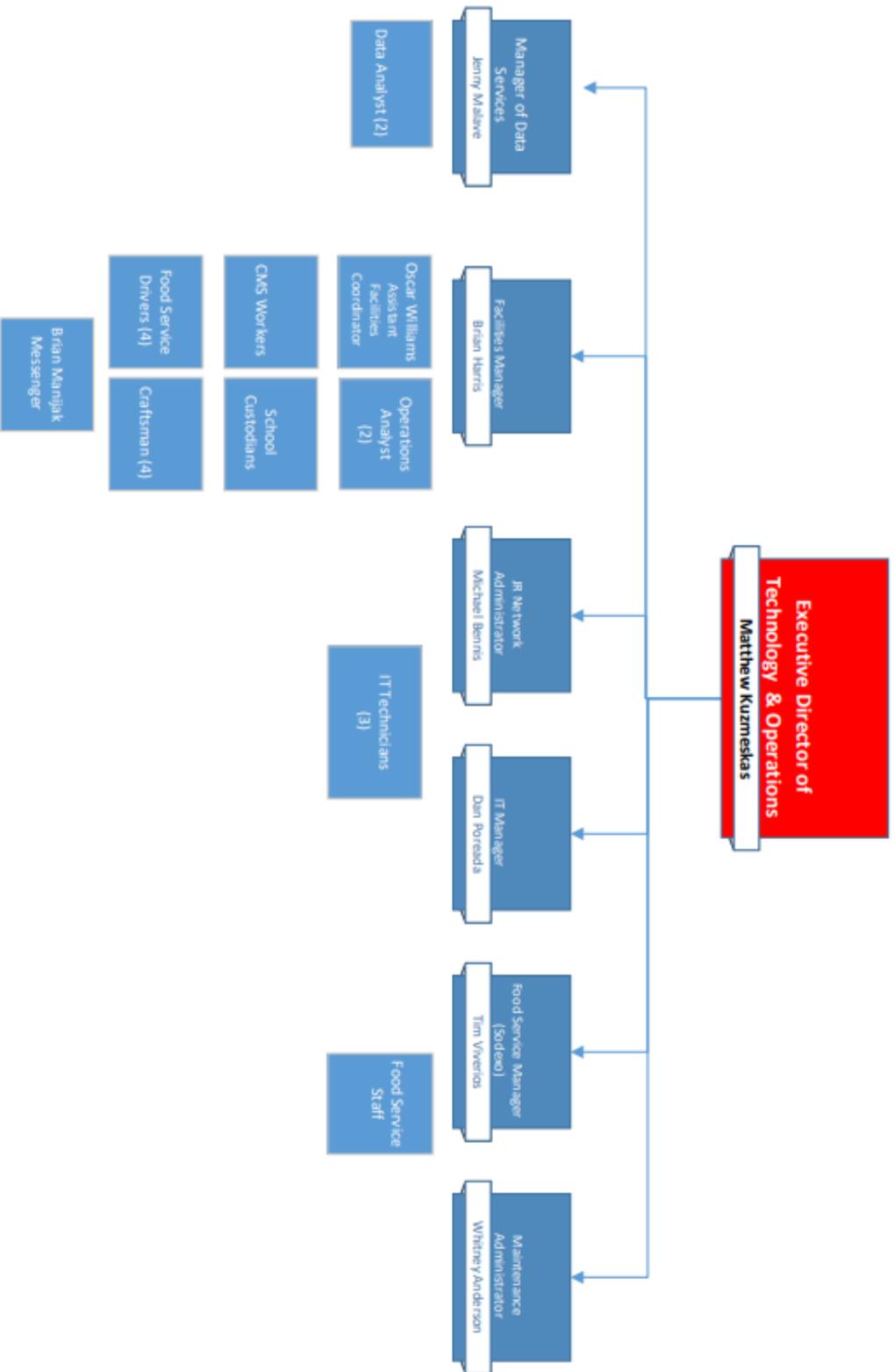
The Executive Director of Technology and Operations oversees the Departments of Technology and Operations, which includes Food Service. All of the operations departments share a mission of providing a safe, comfortable, and nurturing learning environment that will allow our students and staff to flourish.



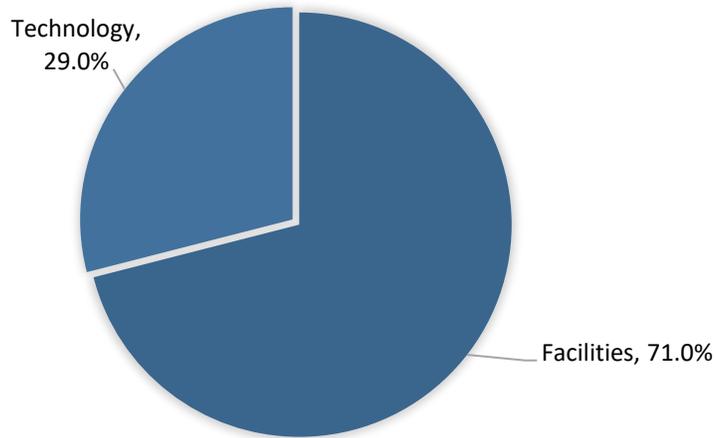
# HOLYOKE PUBLIC SCHOOLS

A PATHWAY FOR EVERY STUDENT

## Office Technology and Operations



## OPERATIONS & TECHNOLOGY



	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Operations	4,945,663	5,126,140	180,477	3.6%
Technology	2,147,782	2,092,895	(54,887)	(2.6%)
<b>Total Operations &amp; Technology</b>	<b>7,093,445</b>	<b>7,219,035</b>	<b>125,590</b>	<b>1.8%</b>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	1,442,595	1,534,185	91,590	6.3%
Supplies/Services/Utilities	5,650,850	5,684,850	34,000	0.6%
<b>Total Curriculum &amp; Instr.</b>	<b>7,093,445</b>	<b>7,219,035</b>	<b>125,590</b>	<b>1.8%</b>

### Summary of FTE's for Tech. & Ops.

	<u>2022</u>	<u>2023</u>	<u>Change</u>
	<i>Budget</i>	<i>Budget</i>	
General Fund	76.6	73.6	(3.0)
Special Revenues	1.0	6.5	5.5
<b>Total FTE's</b>	<b>77.6</b>	<b>80.1</b>	<b>2.5</b>

# Human Resources

## MISSION

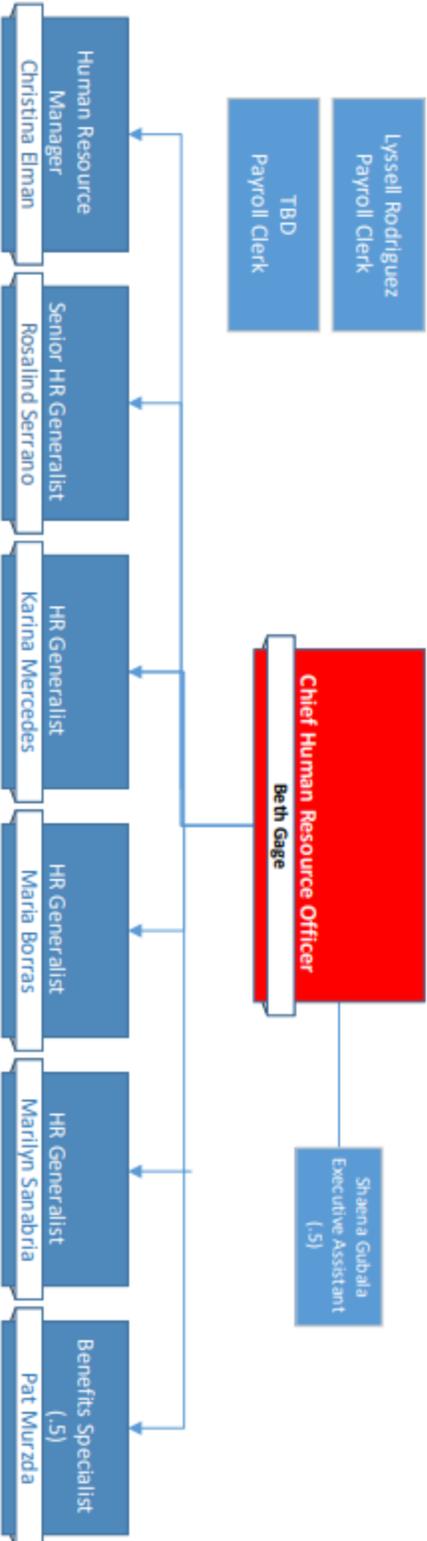
Our Human Resource Department works in partnership with a variety of stakeholders to create strategic partnerships while providing quality, customer driven human resource services in order to support the district's strategic priorities and turnaround efforts, and to elevate the quality of our workforce. We are committed to developing and delivering innovative human resource programs that promote effective, systematic, efficient, and timely management of human resource functions.

Our core services and competencies include recruitment, hiring, retention, employee relations, labor relations, organizational and employee development, risk management, performance management, compensation and benefits, Human Resource information management, and regulatory compliance.



**HOLYOKE PUBLIC SCHOOLS**  
A PATHWAY FOR EVERY STUDENT

**Office of Human Resources**



## DEPARTMENT OF HUMAN RESOURCES

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Human Resources	682,398	874,486	192,088	28.1%
	<b>682,398</b>	<b>874,486</b>	<b>192,088</b>	<b>28.1%</b>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
<b>HUMAN RESOURCES</b>				
Personnel Services	514,503	640,959	126,456	24.6%
Supplies & Services	167,895	233,527	65,632	39.1%
Total Human Resources	<b>682,398</b>	<b>874,486</b>	<b>192,088</b>	<b>28.1%</b>

### Summary of FTE's for HR

	<i>2022 Budget</i>	<i>2023 Budget</i>	Change
General Fund	8.5	9.0	0.5
Special Revenues			0.0
Total FTE's	<b>8.5</b>	<b>9.0</b>	<b>0.5</b>

# Pupil Services

## MISSION

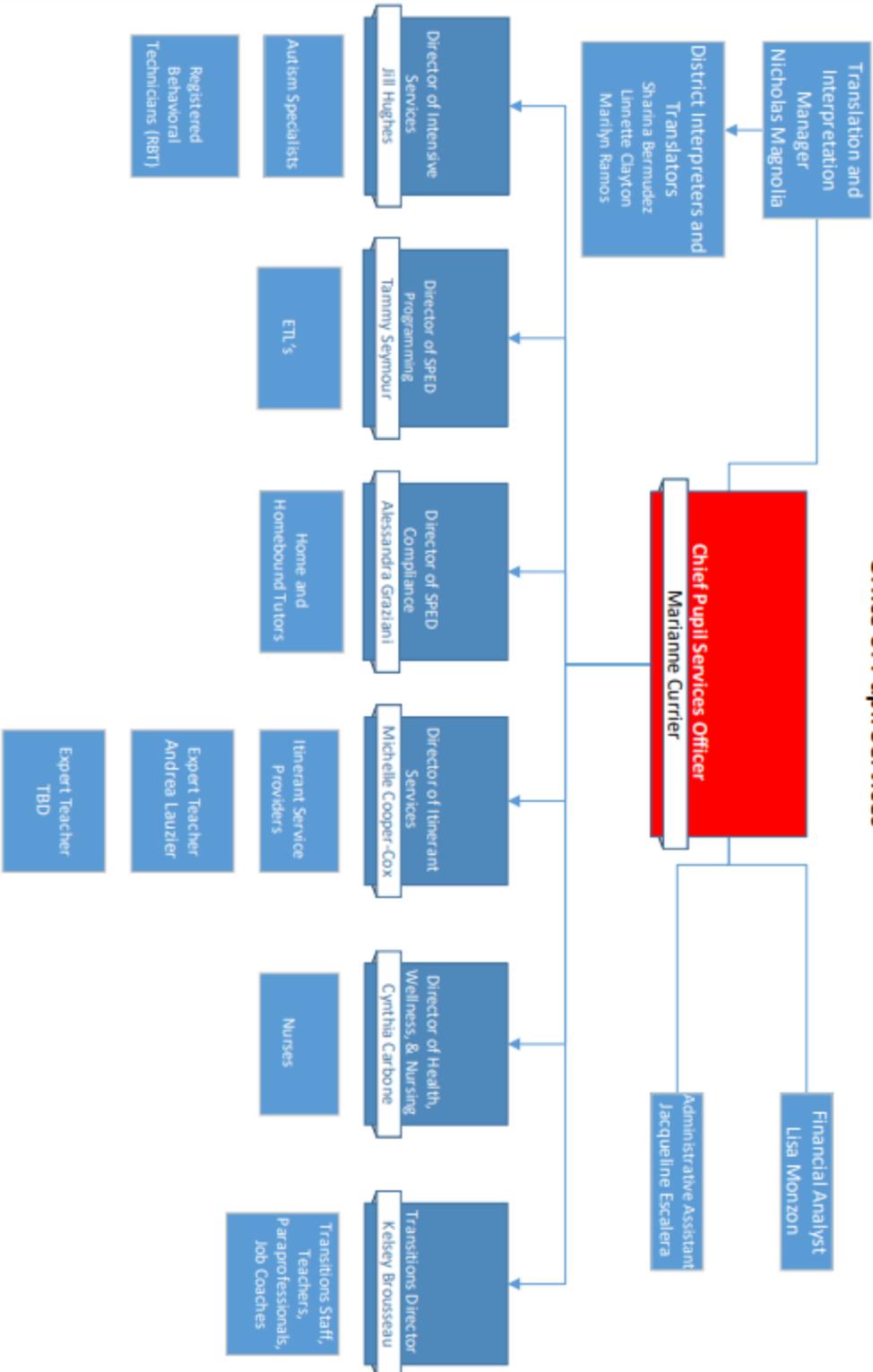
**Our students will:** graduate with an additional credential that provides for college and career options; think critically and communicate with purpose; value themselves, value others and value being part of the Holyoke community; and lead with Growth Mindset and Self Management. We are Holyoke families' 1st choice for their children's education.

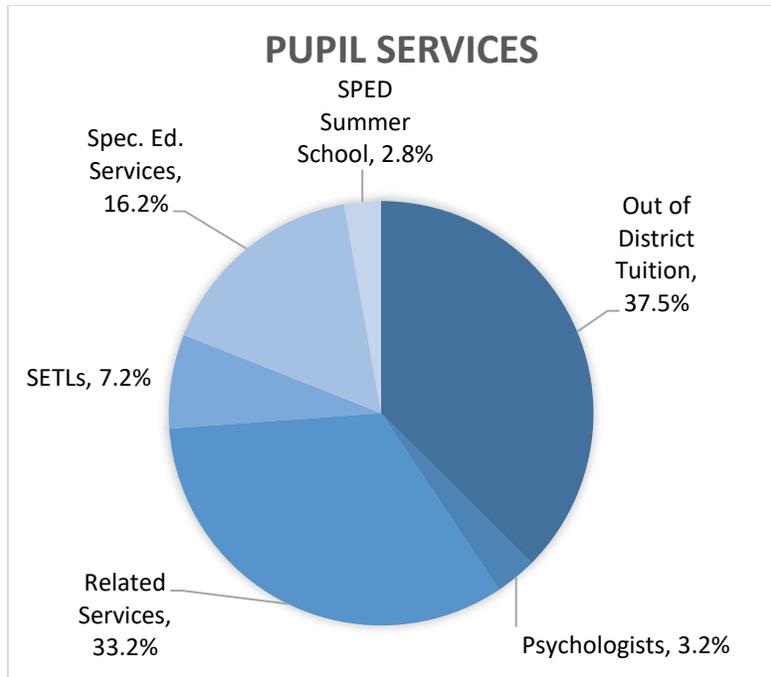
The Office of Pupil Services provides students the opportunity to receive high quality education in the least restrictive environment through the provision of specialized services and supports that meet their unique learning, social, emotional, and behavioral needs. It is our mission to collaborate with the school community, families, students, and community stakeholders to ensure the academic, social, and emotional success of every learner.

## Expected FY 2023 Outcomes for Pupil Services:

- Provide the supports and resources our students with disabilities need to make successfully reintegrate into the full in school learning environment.
- Offer the necessary support to our teachers to be trained in intervention programs and provide support for roll out of intervention programs with fidelity.
- Fully implement a system of targeted coaching for special education teachers both inclusion and substantially separate to increase skill set and improve retention.
- Provide targeted professional development and coaching for all staff in inclusive practices, co-teaching, and individualized service delivery
- Meet and maintain special education compliance benchmarks
- Continue the implementation of training initiative for ETL's and itinerant staff which includes both technical knowledge and shift in mindset to promote more students in an inclusionary setting and stronger IEP writing with a focus on individualization.
- Develop and communicate a systematic, data-based plan for increasing opportunities for students to be in the least restrictive environment.
- Continue to re-build relationships with families by providing multiple opportunities for parent meetings, workshops, and training, as well as continuous opportunity for feedback.
- Continue to expand our transitional opportunities for our 18+ student population.
- Ensure that appropriate staffing ratios are maintained across all schools.

**Office of Pupil Services**





	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Out of District Tuition	4,703,299	4,899,645	196,346	4.2%
Psychologists	484,528	414,750	(69,778)	(14.4%)
Related Services	3,990,192	4,347,299	357,107	8.9%
SETLs	956,754	936,754	(20,000)	(2.1%)
Spec. Ed. Services	1,829,729	2,116,005	286,276	15.6%
SPED Summer School	368,280	368,480	200	0.1%
<b>Total Pupil Services</b>	<b>12,332,782</b>	<b>13,082,933</b>	<b>750,151</b>	<b>6.1%</b>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	5,958,428	6,247,293	288,865	4.8%
Supplies & Services	6,374,354	6,835,640	461,286	7.2%
<b>Total Pupil Services</b>	<b>12,332,782</b>	<b>13,082,933</b>	<b>750,151</b>	<b>6.1%</b>

#### Summary of FTE's for Pupil Services

	<u>2022 Budget</u>	<u>2023 Budget</u>	<u>Change</u>
General Fund	127.4	129.9	2.5
Special Revenues	7.6	11.1	3.5
<b>Total FTE's</b>	<b>135.0</b>	<b>141.0</b>	<b>6.0</b>

## Turnaround, Enrollment & Transportation

### MISSION

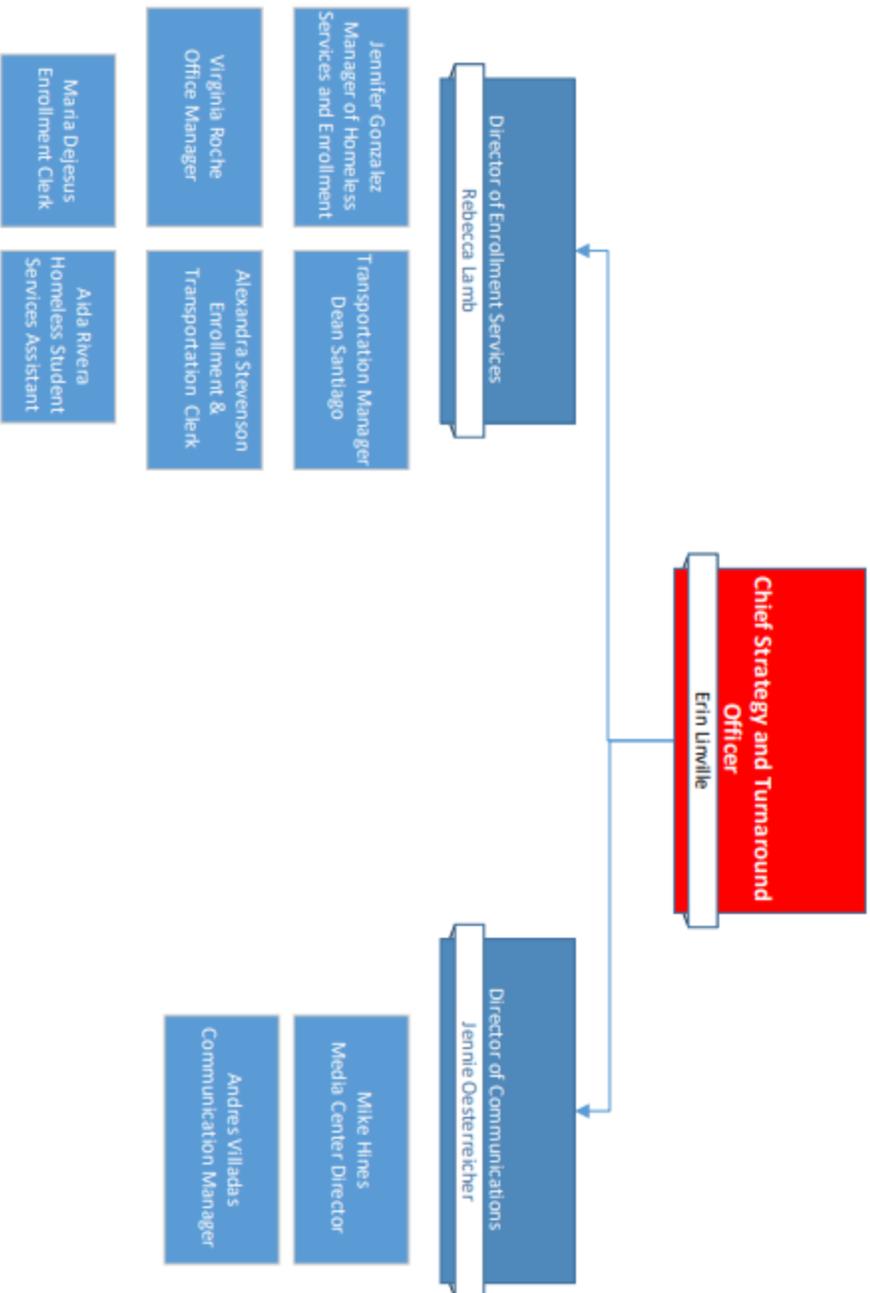
The Chief of Strategy and Turnaround facilitates district Strategic Planning including coordinating with the Superintendent to achieve the goals of the district Turnaround Plan. The Chief of Strategy and Turnaround also supervises the Director of Communications and the Director of Enrollment Services, the latter of whom coordinates student transportation. Therefore, the Chief of Strategy and Turnaround is responsible for the components of the budget listed below.



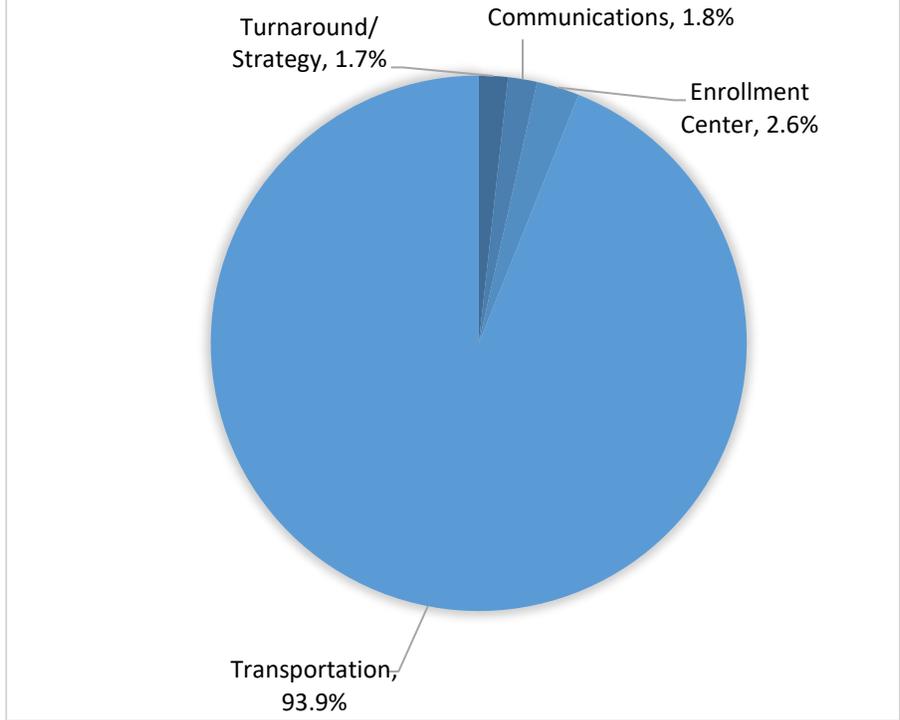
# HOLYOKE PUBLIC SCHOOLS

A PATHWAY FOR EVERY STUDENT

## Office of Strategy and Turnaround



## CHIEF OF STRATEGY & TURNAROUND



	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Turnaround/ Strategy	27,629	167,379	139,750	505.8%
Communications	163,423	167,755	4,332	2.7%
Enrollment Center	219,749	247,356	27,607	12.6%
Transportation	9,073,564	8,999,967	(73,597)	(0.8%)
<b>Total CS&amp;T</b>	<b>9,484,365</b>	<b>9,582,457</b>	<b>98,092</b>	<b>1.0%</b>

	<u>2022</u>	<u>2023</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	350,946	535,627	184,681	52.6%
Supplies & Services	9,133,419	9,046,830	(86,589)	(0.9%)
<b>Total CS&amp;T</b>	<b>9,484,365</b>	<b>9,582,457</b>	<b>98,092</b>	<b>1.0%</b>

### Summary of FTE's for Chief of Strategy & Turnaround

	<u>2021 Budget</u>	<u>2022 Budget</u>	<u>Change</u>
General Fund	6.9	8.0	1.1
Special Revenues	3.6	3.0	(0.6)
<b>Total FTE's</b>	<b>10.5</b>	<b>11.0</b>	<b>0.5</b>

## Special Revenues

### SPECIAL REVENUE DETAIL

	FY 2018 Budget	FY 2019 Budget	FY 2020 Budget	FY 2021 Budget	FY 2022 Budget	FY 2023 Estimate
<b>FEDERAL GRANTS</b>						
Title I	5,330,722	5,083,218	4,829,057	5,178,147	4,810,872	4,858,236
Title I - School Support	1,625,000	1,231,148	1,200,000	1,087,550	685,000	400,000
Education Emergency Relief fund (ESSER)	-	-	-	4,251,035	10,786,974	21,069,048
IDEA - Special Education Entitlement	1,867,578	1,895,034	1,800,282	1,961,136	2,486,499	2,260,000
Title IIA - Improving Educator Equality	489,818	476,171	452,362	464,605	345,562	376,786
Title III - English Language Acquisition	181,427	185,755	176,467	167,254	180,544	182,349
Title IV-A Student Support & Academic Enrichment	143,160	383,205	364,045	341,575	355,176	358,728
Perkins	169,003	184,155	174,947	182,379	152,521	167,773
McKinney Homeless	40,000	105,000	30,000	105,000	120,000	120,000
McKinney Homeless Emergency Support	5,000	36,844	26,505	-	281,133	225,000
21st Century Community Learning	831,565	870,326	826,810	593,441	467,404	600,000
Miscellaneous Federal Grants	1,500,000	1,853,420	1,668,078	451,077	465,087	386,000
<b>TOTAL FEDERAL GRANTS</b>	<b>13,176,124</b>	<b>13,020,374</b>	<b>12,121,168</b>	<b>15,320,778</b>	<b>21,136,772</b>	<b>31,003,920</b>
<b>STATE GRANTS</b>						
Adult Education Learning Center	424,847	70,308	201,308	118,480	128,941	129,000
Comprehensive School Health Services	-	-	188,000	188,000	170,000	170,000
Bi-lingual Programming	-	-	-	138,180	143,827	140,000
EEC Pre-K CPPI	-	-	-	625,000	665,000	250,000
Extended learning support	70,528	77,995	74,095	56,012	147,608	94,000
Support Underperforming Districts/Intervention	295,000	100,000	150,000	150,000	210,000	210,000
Miscellaneous State Grants	847,071	780,659	741,626	560,000	354,653	354,653
<b>TOTAL STATE GRANTS</b>	<b>1,637,446</b>	<b>1,042,107</b>	<b>1,368,174</b>	<b>1,849,111</b>	<b>1,820,029</b>	<b>1,347,653</b>
Private Grants	473,094	935,757	655,030	890,000	848,455	1,000,000
<b>TOTAL PRIVATE GRANTS</b>	<b>473,094</b>	<b>935,757</b>	<b>655,030</b>	<b>890,000</b>	<b>848,455</b>	<b>1,000,000</b>
<b>REVOLVING FUNDS</b>						
Food Service Program (Ch. 548 Acts 1948)	4,500,000	4,900,000	4,600,000	4,950,000	5,200,000	5,200,000
Circuit Breaker (Ch. 139 Acts 2006)	1,263,608	1,926,078	2,063,466	2,524,774	2,774,563	2,500,000
Tuition (Ch. 71 Sec. 71F)	288,043	735,000	694,796	985,144	968,025	1,055,938
Athletics	33,223	35,000	35,000	35,000	35,000	35,000
Peg Access	65,000	110,000	110,000	81,000	70,000	70,000
Sped Tuition/Summer School	80,000	50,000	50,000	46,000	46,000	46,000
Works and Products	9,863	9,000	9,000	24,000	24,000	24,000
Rentals	40,000	40,000	40,000	10,000	8,000	8,000
Theft Damage Restitution	1,858	1,500	1,500	1,500	1,500	1,500
School Gifts and Contributions	35,000	30,000	30,000	30,000	30,000	30,000
<b>TOTAL REVOLVING FUNDS</b>	<b>6,316,595</b>	<b>7,836,578</b>	<b>7,633,762</b>	<b>8,687,418</b>	<b>9,157,088</b>	<b>8,970,438</b>
<b>TOTAL GRANTS &amp; SPECIAL REVENUE</b>	<b>21,603,259</b>	<b>22,834,816</b>	<b>21,778,134</b>	<b>26,747,307</b>	<b>32,962,344</b>	<b>42,322,011</b>

Special revenue funds are accounted for separately from the general fund. Grants from federal and state agencies or private donors comprise the largest source of special revenue funds available to the District. These funds are typically for specific programs and may carry many restrictions and reporting requirements.

Revolving funds comprise the remaining type of special revenue funds. Revolving funds are established to support ongoing programs with program revenues. These funds include the Circuit Breaker reimbursement, athletics, and food services program as well as other district programs.

Below are details of major sources of the District’s special revenue funds.

**FEDERAL GRANTS**

The Federal administration’s strategy has been to maintain and marginally increase support for Title I, Individuals with Disabilities Education Act (IDEA), and level fund or reduce funding for nearly all other grants. Additionally, they provide resources to improve: supplemental Reading and Math programs; social services for and the education of homeless students; supplemental education services (academic tutoring for high needs students); schools in need of improvement; corrective action restructuring; literacy and Math programs at identified schools (based on review of disaggregated student achievement data); and required support for non-public schools.

**ESSER: \$57.9 Million**

The Federal Government passed three laws providing substantial fiscal stimulus to recover from the pandemic – the CARES Act (March 2020), the Coronavirus Response and Relief Supplemental Appropriations Act (Dec 2020), and the American Rescue Plan Act (March 2021). All three provided resources to school districts to respond to the pandemic. The Education portion of this funding the Elementary and Secondary School Emergency Relief fund (ESSER) is to help schools and districts safely reopen and sustain the safe operation of schools and must respond to the academic, social, emotional, and mental health needs of all students, and particularly those disproportionately impacted by the pandemic. The funding from the three laws are referred to as ESSER I, II, and III. The District received \$4.2 million in ESSER I to be used by 6/30/2023. The ESSER II allocation to the District was \$16.5 million and must be spent by 9/30/2023. Lastly, the ESSER III allocation is \$37.1 million and must be spent by 9/30/2024.

ESSER I	\$4,251,035
ESSER II	\$16,523,318
ESSER III	\$37,109,025
<b>Grand Total</b>	<b>\$57,883,378</b>

### **Title I: \$4.8M**

Title I, which is authorized under the Every Student Succeeds Act (ESSA), provides resources to local school districts assisting low achieving students in high poverty schools to meet the State's challenging academic standards. The priorities of Title I are to:

- Strengthen the core program in schools and provide academic and/or support services to low achieving students at the preschool, elementary, middle, and high school-levels in support of ESSA goals.
- Provide programs based on scientific research that enables participating students to achieve the learning standards of the State curriculum frameworks.
- Elevate significantly the quality of instruction by providing staff with substantial opportunities for professional development.
- Involve parents of participating public and private school children in the development of and participation in the program, activities, and procedures for parents and students to improve student achievement.

### **Title IIA: \$376k**

The priorities of Title II, Part A are to: (1) increase student achievement consistent with State academic standards; (2) improve the quality and effectiveness of teachers, principals, and other school leaders; (3) increase the number of teachers, principals, and other school leaders who are effective in improving student academic achievement in schools; and (4) provide low-income and minority students equitable access to effective teachers, principals, and other school leaders. Finally, like other federal Elementary and Secondary Education Act (ESEA) grants, the Title II, Part A program seeks to prepare all students, especially those students from historically disadvantaged backgrounds for the transition after high school by providing equitable access to great teachers and administrators

### **IDEA – Special Education Entitlement: \$2.2M**

This federal entitlement grant program is to provide funds to ensure that eligible students with disabilities receive a free and appropriate public education that includes special education and related services designed to meet their individual needs. These federal special education funds that are provided are primarily used to fund out of district tuition costs for students in specialized programs not offered by HPS.

### **Title III - English Language Acquisition: \$182K**

The purpose of this federal grant program is to provide funds to improve the educational performance of English Learners (EL) students by assisting them in learning English and meeting state academic content standards. The primary objectives of this grant are to:

- Increase English proficiency and academic achievement in core academic subjects of Limited English Proficient students by providing high-quality language instruction programs and content area teaching.
- Provide high-quality professional development to enable classroom teachers to deliver effective sheltered content and English language instruction.
- Develop, implement, and provide extended day, weekend, and summer opportunities for English language and academic content instruction for Limited English Proficient students.

**Perkins: \$167K**

The purpose of this federal grant is to assist school districts in improving secondary-level programs that meet the definition of career and technical education as contained in the Carl D. Perkins Career & Technical Education Improvement Act of 2006 P.L.109-270 (Perkins IV).

The five key priorities that ESE has identified for increasing student performance statewide include: preparing students for college and career; strengthening curriculum and instruction; strengthening educator effectiveness; supporting data use to improve policy decisions and student achievement; and turning around our lowest performing schools. The Perkins grant program is intended to support all five (where applicable) by continuously improving career/vocational technical education in Massachusetts and close the achievement gap for special populations on the Perkins core indicators of performance.

**FOOD SERVICE PROGRAM**

Established under Chapter 548 in the Acts of 1948, and primarily funded through cash sales and reimbursements from the U. S. Department of Agriculture, Holyoke Public Schools’ food service program is a \$5.0 million operation that provides meals to students. The majority of the money is used to pay for the management fee to SODEXO and to pay for all of our food service staff. The program generates a surplus, which is used to improve the quality of the program and invest in necessary capital in our kitchens and cafeterias.

**CIRCUIT BREAKER PROGRAM**

The State special education reimbursement program governed by M.G.L. Ch. 71B §5A, commonly known as the Circuit Breaker program, reimburses Holyoke Public Schools for the cost of special education services.

The formula voted by the State Legislature calls for districts to receive 72% reimbursement of their costs exceeding an amount equal to four times the state-wide average foundation budget per pupil, as calculated under Chapter 70. However, because Circuit Breaker reimbursements are subject to appropriation, the actual reimbursement percentage varies. In addition to the regular Circuit Breaker reimbursements, the “extraordinary relief” program helps districts whose expenses increased by 25% or more over the prior fiscal year.

For FY 2023 the District is estimating a 72% reimbursement rate. Reimbursements are based on prior year's expenses for special education instructional services provided to each student. For FY 2023, projected Circuit Breaker funds of \$2.5 million will be used to offset the budgeted costs of out-of-district special education tuition.

Circuit Breaker reimbursements are set aside into a special education account. The District may expend the funds in the year received or in the following fiscal year for any special education services.

## Summary of Major Budget Assumptions

Considering that not all factors are known when building a budget, part of the budget process involves making realistic assumptions about what will happen. Because changes in assumptions can result in budgetary surpluses or deficits, understanding the underlying foundations of the budget is important for readers. Assumptions are made by analyzing the best information available at the time. Below are the major assumptions used by the District when building the FY 2023 Budget.

### REVENUE

- Final State revenues will be equal to the House Ways and Means Budget
- The City will meet their required local contribution.
- Circuit Breaker reimbursement will remain at similar rates.
- Title I will be level funded
- All E-Rate applications will be approved

### EXPENSES

- School-based enrollment will be consistent with the enrollment used for the school staffing allocations
- Utility rates will not increase more than estimates as of April 2022
- Personnel salary lost time and attrition will be \$1,000,000
- Final State assessments will be equal to the House Ways and Means budget
- Special education out-of-district tuition costs will be consistent with FY 22 expenses and circuit breaker will be used to offset these costs
- The City will fully fund their transportation and lease obligations
- The City will fulfill its obligation to fund schools at the net school spending requirement

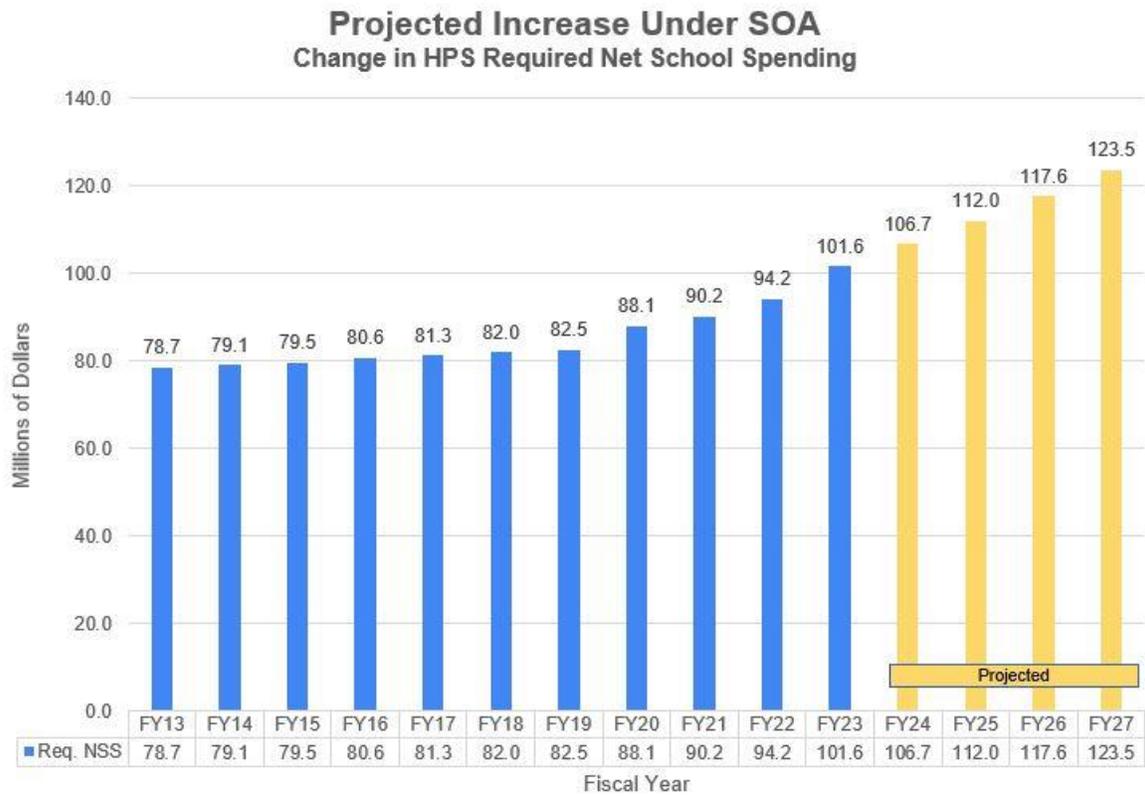
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# Information

## General Fund Budget Forecast

As stated earlier, the Student Opportunity Act (SOA) promises to continue to increase HPS’s budget in future years assuming state revenue does not decline significantly. The graph below projects the required Net School Spending amounts through the 6<sup>th</sup> year of SOA’s implementation assuming an annual 5% increase. The increase in net school spending under SOA will allow us to invest more funds into our discretionary spending (salaries and supplies/services) – mainly into salaries for our staff, the key drivers or student learning.



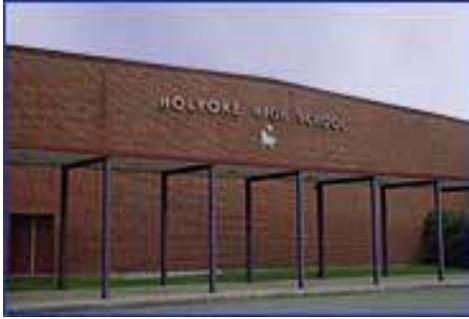
# Holyoke Public Schools

## Projected FY23 Budget

	Final State	Final Proposed	Projected	Projected	Projected	Projected	ASSUMPTION	
	Budget	Budget					Rate	Description
REVENUES	FY2022	FY2023	FY2024	FY2025	FY2026	FY2027		
Chapter 70 State Aid	82,852,757	89,419,747	93,890,734	98,585,271	103,514,535	108,690,261	88%	% state aid
Holyoke Required Local Contribution	11,380,266	12,193,602	12,803,282	13,443,446	14,115,618	14,821,399		Local contr.
<b>Required Net School Spending</b>	<b>94,233,023</b>	<b>101,613,349</b>	<b>106,694,016</b>	<b>112,028,717</b>	<b>117,630,153</b>	<b>123,511,661</b>	5%	Annual increase
City Admin NSS (Admin and Parks)	(148,400)	(148,400)	(148,400)	(148,400)	(148,400)	(148,400)		
Charter Tuition/Other Revenues	1,123,286	2,603,229	2,342,906	2,108,615	1,897,754	1,707,979	-10%	Annual decrease
<b>Adjusted Net School Spending</b>	<b>95,207,909</b>	<b>104,068,178</b>	<b>108,888,523</b>	<b>113,988,933</b>	<b>119,379,507</b>	<b>125,071,239</b>		
Transportation (Including Cross.Grds)	9,073,384	8,999,967	9,359,966	9,734,364	10,123,739	10,528,688	4%	Annual increase
Leases not eligible for NSS	190,000	237,071	405,371	405,371	405,371	405,371		Metcalf in FY24
Medicaid	100,000	100,000	100,000	100,000	100,000	100,000		
<b>Total General Fund Budget</b>	<b>104,571,293</b>	<b>113,405,216</b>	<b>118,753,859</b>	<b>124,228,668</b>	<b>130,008,617</b>	<b>136,105,299</b>		
Supplemental Funding	3,574,103	0	0	0	0	0		
<b>TOTAL OPERATING REVENUE</b>	<b>108,145,396</b>	<b>113,405,216</b>	<b>118,753,859</b>	<b>124,228,668</b>	<b>130,008,617</b>	<b>136,105,299</b>		
<b>EXPENSES</b>								
Salaries	52,696,086	56,596,915	58,774,757	61,357,679	64,091,043	66,978,667	4%	Annual increase
Supplies & Services	9,495,578	9,158,750	9,513,282	9,933,758	10,378,724	10,848,803	4%	Annual increase
<b>Total Discretionary Expenses</b>	<b>62,191,664</b>	<b>65,755,665</b>	<b>68,288,039</b>	<b>71,291,437</b>	<b>74,469,767</b>	<b>77,827,470</b>		
<i>Health Insurance</i>	<i>7,816,935</i>	<i>8,008,164</i>	<i>8,568,735</i>	<i>9,168,547</i>	<i>9,810,345</i>	<i>10,497,069</i>	7%	Annual increase
<i>Retirement non teachers</i>	<i>2,233,693</i>	<i>2,270,407</i>	<i>2,383,927</i>	<i>2,503,124</i>	<i>2,628,280</i>	<i>2,759,694</i>	5%	Annual increase
Retired Teachers Health	3,877,760	3,806,731	3,997,068	4,196,921	4,406,767	4,627,105	5%	Annual increase
Other Benefits	511,000	511,000	511,000	511,000	511,000	511,000		
Unemployment	600,000	300,000	600,000	600,000	600,000	600,000		
Utilities	2,573,418	2,613,418	2,691,821	2,772,575	2,855,752	2,941,425	3%	Annual increase
Out of District Tuition	4,703,299	4,899,645	5,144,627	5,401,859	5,671,952	5,955,549	5%	Annual increase
Charter Tuition/School Choice	14,381,641	16,003,148	16,803,305	17,643,471	18,525,644	19,451,926	5%	Annual increase
<b>Total Non-Discretionary Expenses *</b>	<b>36,697,746</b>	<b>38,412,513</b>	<b>40,700,484</b>	<b>42,797,496</b>	<b>45,009,740</b>	<b>47,343,769</b>		
One Time Funding Expiring	0	0	0	0	0	0		
Transportation, Adult Ed, Leases (Non-NSS)	9,255,986	9,237,038	9,765,337	10,139,735	10,529,110	10,934,059		Transp+Leases
<b>Sub-Total Operating Budget Expenses</b>	<b>108,145,396</b>	<b>113,405,216</b>	<b>118,753,859</b>	<b>124,228,668</b>	<b>130,008,617</b>	<b>136,105,299</b>		
<b>TOTAL EXPENSES PROJECTED</b>	<b>108,145,396</b>	<b>113,405,216</b>	<b>118,753,859</b>	<b>124,228,668</b>	<b>130,008,617</b>	<b>136,105,299</b>		
<b>Total FY23 Anticipated Budget Gap/Surplus</b>								
	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>		<b>0</b>



# Schools



## Holyoke High School

### Principals:

**Lori McKenna – HHS North**

**Alan Gates – Dean Tech**

**Geoffrey Schmidt – Opportunity Academy**

**Holyoke High School is one school with three campuses, each with a dedicated principal**

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### MESSAGE FROM THE PRINCIPAL

The most important work we do at Holyoke High School's three campuses is to push and support our students to become their very best selves. We need our graduates to be thoughtful and informed citizen-leaders, to be creative and productive in their work, and to be the kinds of men and women who care for family and look out for friends and neighbors. Thank you for your support.

This budget supports the programs, structures and staff we believe can best support our students and families. It is important to note that while in past years much of the North Campus redesign work has been funded through grants, this year marks a shift from grant funding to district funding, a shift we anticipate growing more to the district side in coming years. The budget supports the following on our three campuses:

#### HHS North Campus

This budget for Holyoke High School North supports the programs, structures and staff we believe can best support our students and families.

- Maintain the level of staffing required to offer a comprehensive curriculum that embraces the arts and languages as well as the traditional core academics.
- Continue the staffing that supports a robust work based learning.
- Continue the staffing that provides expanded support for college counseling.
- Continue to support and expand the co-teaching model as well as provide necessary interventions for students.
- Continue credit recovery options for students.
- Continue to support a variety of extracurriculars that help students to feel connected to and excited about school.

Continue the HCC partnership and HHS staffing that supports advanced learning opportunities, including the following:

- Early college access, with an intentional focus on first-generation students
- Internships and Senior Capstones
- Advanced Placement Courses

- Continue the staffing that supports 9th grade teams and gr. 10-12 academies

Support curriculum development and implementation in the following areas:

- ELA
- Mathematics
- US History
- Interventions

**Dean Campus:**

- Expanding faculty and staff to meet the campus' final year of enrollment growth, nearly tripling in size over the past three years
- Expanding the support for fieldwork and co-ops to support the reinvigorated vocational program
- Expanding the level of instructional support for all teachers so that student learning is significantly accelerated
- Providing the requisite administrative support for a campus which has nearly tripled in size and remained level in terms of leadership positions

**Opportunity Academy Campus**

- Continue to support faculty and student support positions within the campus' academic program
- Continue to support the campus' aggressive outreach to disengaged students
- Expand the number of seats available to Holyoke students and families at our partner programs, HCC Gateway to College and Lighthouse Academy

Holyoke High School remains an interconnected and collaborative 3 campus high school, even as the North and Dean campuses move to developing supports that better fit their specific programs. We look forward to leading extraordinary men and women as we return from remote schooling and get back at working hard, being kind, and getting smarter.

**Lori McKenna, Principal North Campus**

**Alan Gates, Principal Dean Campus**

**Geoffrey Schmidt, Director of Opportunity Academy**

## FY 2023 STAFFING & BUDGET SUMMARY

Holyoke High School North and Dean Campus

500 Beech Street

(413) 534-2020

Grades Served: 9-12

FY 2023 Est. Enrollment: 1,452

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	120.5	115.5	127.4	128.5	147.5
Paraprofessionals	27	26	34	37	36
Principals/Administrators	8	7	7	7	9
Clerks	7	7.5	8	8	8
Counselors	9	9	11	12	16
Nurses	4	4	5	5	6
Custodians	15	14.5	14	14	14
Other	27	30.5	34	28.5	29
<b>All Funds Staffing Total</b>	<b>217.5</b>	<b>214</b>	<b>240.4</b>	<b>240</b>	<b>265.5</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$9,734,785	\$9,178,621	\$10,921,524	\$10,084,189	11,574,189
Supplies & Services	\$316,337	\$216,432	\$220,137	\$371,000	261,827
<b>Total General Fund</b>	<b>\$10,051,122</b>	<b>\$9,395,053</b>	<b>\$11,141,661</b>	<b>\$10,455,189</b>	<b>\$11,836,016</b>

## FY 2023 SCHOOL REPORT CARD

Holyoke High School North and Dean Campus

500 Beech Street

(413) 534-2020

### Overall Performance Summary\*

**Accountability & Assistance Level** All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

<b>Accountability Percentile</b>	2	<b>Progress</b>	25% Moderate progress towards targets
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### Accountability Targets & Actual

CPI & Growth by Subject	Baseline	2017 Target	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA CPI/SS	91	95.5	92.5	94.2	93.6	95.4	88.7	n/a	n/a	n/a	489.1
Math CPI/SS	84.2	92.1	77.9	80.1	78.5	81.1	69.3	n/a	n/a	n/a	478.5
Science CPI/SS	72.2	86.1	77.2	79.7	76.5	79	66.2	n/a	n/a	n/a	n/a
ELA SGP	34	50	44	50	42.7	50	40.3	n/a	n/a	50	48.1
Math SGP	56	50	27.5	50	38.5	50	34.5	n/a	n/a	50	26.4

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	77.9	% Limited English Proficient	22	% of Teachers Licensed in Teaching Assignment	92.6
Enrollment	1,566	% Special Education	24.1	% of teachers without waiver or provisional license	84.2
Graduation Rate	75.8	% First Language not English	45.4		
Dropout Rate	7.6	High Needs	81.5		

<b>In-School Suspension Rate</b>	<b>**</b>	<b>% African American</b>	<b>3.1</b>	<b>Student / Teacher Ratio</b>	<b>14.6 to 1</b>
<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.3</b>		
<b>Retention Rate</b>	<b>3.6</b>	<b>% Hispanic</b>	<b>80</b>		
<b>Unexcused Absences &gt;9</b>	<b>11</b>	<b>% White</b>	<b>15.5</b>		

\*\*Rate not included -- low number of suspensions due to remote learning in SY20/21



## Holyoke STEM Academy

**Principal:** Korin Hall

**Number of years as principal at current school:** 1st year

**Number of years as a principal in HPS:** 1st year

**Number of years employed with HPS:** 4

**Education background:** B.A. Smith College, M.A. University of Massachusetts, C.A.G.S American International College

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### MESSAGE FROM THE PRINCIPAL

Welcome to the Holyoke STEM Academy. At Holyoke STEM we strive to offer a robust middle school experience allowing students to receive their core academics in a supportive environment. One in which we empower all students to develop and apply problem solving, critical thinking, communication, and collaboration skills through a focus on independent learning.

Holyoke STEM Academy is a high-performing, innovative, and responsive school where all students are passionate learners, resilient problem-solvers, and effective communicators. Holyoke STEM Academy students will be successful in high school and able to compete in an ever-changing world.

## FY 2023 STAFFING & BUDGET SUMMARY

Holyoke STEM Academy

1045 Main Street

(413) 535-0345

Grades Served: 6-8

FY 2023 Est.  
Enrollment:

307

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	20	18	24	26.5	30
Paraprofessionals	4	5	14	15	17
Principals/Administrators	3	1	2	2	4
Clerks	1	1	1	1	1.5
Counselors	1	1	1	1.5	2
Nurses	0	0	0	0	
Custodians	0	0	0	0	
Other	2	2	2	3	2
<b>All Funds Staffing Total</b>	<b>31</b>	<b>28</b>	<b>44</b>	<b>49</b>	<b>56.5</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$1,767,824	\$1,339,182	\$1,948,106	\$1,821,197	\$2,367,639
Supplies & Services	\$30,727	\$31,873	\$12,600	\$6,053	\$79,413
<b>Total General Fund</b>	<b>\$1,798,551</b>	<b>\$1,371,055</b>	<b>\$1,960,706</b>	<b>\$1,827,250</b>	<b>\$2,447,052</b>

## FY 2023 SCHOOL REPORT CARD

Holyoke STEM Academy

1045 Main Street

(413) 535-0345

### Overall Performance Summary\*

**Accountability & Assistance Level**

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

<b>Accountability Percentile</b>	n/a	<b>Progress</b>	n/a
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### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	n/a	n/a	n/a	n/a	472.1	n/a	n/a	n/a	470.7
Math SS	n/a	n/a	n/a	n/a	470.4	n/a	n/a	n/a	466.7
Science SS	n/a	n/a	n/a	n/a	475.2	n/a	n/a	n/a	473.4
ELA SGP	n/a	n/a	n/a	n/a	34.9	n/a	n/a	50	29
Math SGP	n/a	n/a	n/a	n/a	28.7	n/a	n/a	50	23

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	88.9	% Limited English Proficient	26.2	<b>% of Teachers Licensed</b>	<b>95.3</b>
Enrollment	248	% Special Education	27.8	<b>% of teachers without waiver or provisional license</b>	<b>95.3</b>
Graduation Rate	n/a	% First Language not English	43.5		
Dropout Rate	n/a	High Needs	88.3		
In-School Suspension Rate	**	% African American	3.6		

<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.8</b>	<b>Student / Teacher Ratio</b>	<b>11.6 to 1</b>
<b>Retention Rate</b>	<b>0.4</b>	<b>% Hispanic</b>	<b>82.7</b>		
<b>Unexcused Absences &gt;9</b>	<b>3.1</b>	<b>% White</b>	<b>11.7</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					



## Donahue School

**Principal:** Marc Swygert

**Number of years as principal at current school:** 6

**Number of years as a principal in HPS:** 7

**Number of years employed with HPS:** 9

**Education background:** B.S. Canisius College, M.A. Winthrop University

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### MESSAGE FROM THE PRINCIPAL

Welcome to Donahue School! Our goal is to provide a safe and supportive learning environment that is conducive to helping students grow in both the academic and socio-emotional realms. We want to empower our students to become innovative thinkers, problem solvers and lifelong learners. We are committed to providing the support and services necessary to make dreams become a reality for our students.

Donahue School is committed to creating globally aware students through providing a cognitively demanding curriculum, high quality instruction, and a sense of civic and ethical responsibility in all students.

We will nurture collaborative and critical thinking while we support effective communication. The staff and students at the Donahue School are problem solvers, active community members, and work to make Holyoke a vibrant community where diversity is valued and looked upon as an asset.

## FY 2023 STAFFING & BUDGET SUMMARY

Donahue School

Whiting Farm Road

(413) 534-2069

Grades Served: PK-5

FY 2023 Est. Enrollment: 351

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	37	40	38	38	42
Paraprofessionals	40	47	53	53	62
Principals/Administrators	3	3	3	3	4
Clerks	1	1	1	1	1
Counselors	2	2	2	2	2
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	5	6.5	6	6	7
<b>All Funds Staffing Total</b>	<b>93</b>	<b>104.5</b>	<b>108</b>	<b>108</b>	<b>123</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$3,815,573	\$4,113,620	\$4,148,488	\$3,630,171	\$4,230,139
Supplies & Services	\$4,741	\$7,517	\$16,136	\$38,913	\$32,381
<b>Total General Fund</b>	<b>\$3,820,314</b>	<b>\$4,121,137</b>	<b>\$4,164,624</b>	<b>\$3,669,084</b>	<b>\$4,262,520</b>

## FY 2023 SCHOOL REPORT CARD

**Donahue School**

**Whiting Farm Road**

**(413) 534-2069**

### Overall Performance Summary\*

**Accountability & Assistance Level**

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

**Accountability Percentile**

**4**

**Progress**

**59% - Substantial progress toward targets**

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	479.8	481.8	477.3	479.2	481.4	n/a	n/a	n/a	475.9
Math SS	473.4	475.2	472	473.6	474.5	n/a	n/a	n/a	463.7
Science CPI/SS	46.4	49.3	41.8	44.9	45.6	n/a	n/a	n/a	475
ELA SGP	n/a	50	37.9	50	49.4	n/a	n/a	50	30.3
Math SGP	n/a	50	40.7	50	49.6	n/a	n/a	50	30.8

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	87.0	% Limited English Proficient	18.9	% of Teachers Licensed	92
Enrollment	423	% Special Education	33.3		
Graduation Rate	n/a	% First Language not English	32.9	% of teachers without waiver or provisional license	89.3
Dropout Rate	n/a	High Needs	91.7		
In-School Suspension Rate	**	% African American	4		

<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.5</b>	<b>Student / Teacher Ratio</b>	<b>11.3 to 1</b>
<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>82.3</b>		
<b>Unexcused Absences &gt;9</b>	<b>12.6</b>	<b>% White</b>	<b>11.8</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					



## Kelly School

**Principal: Aaron Morris**

**Number of years as principal at current school: 2**

**Number of years as a principal in HPS: 2**

**Number of years employed with HPS: 2**

**Education background: B.S. Loyola University of Chicago, M.Ed. Benedictine University)**

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### MESSAGE FROM THE PRINCIPAL

Dear Kelly Community,

We are excited to embark on another year of working together towards a culture of achievement for our learners. We are excited to work towards our vision of collaborative inclusion in the classroom while living out the priorities outlined in Superintendent Soto's Entry Plan. We are excited to continue to grow our Dual Language program at Kelly School while working to increase the connection between the school and the parents of our learners.

In partnership,

Aaron Morris, Principal

Kelly School

## FY 2023 STAFFING & BUDGET SUMMARY

Kelly School

216 West Street

(413) 534-2078

Grades Served: PK-5

FY 2023 Est. Enrollment: 362

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	35	32	28	28	38.5
Paraprofessionals	8	11	9	8	11
Principals/Administrators	4	2	2	2	4
Clerks	2	1.5	2	1	2
Counselors	2	2	2	2	2
Nurses	1	1	1	1	1
Custodians	4.5	4.5	4.5	4.5	4.5
Other	5	1.8	4	3	3
<b>All Funds Staffing Total</b>	<b>75</b>	<b>61.5</b>	<b>55.8</b>	<b>49.5</b>	<b>66</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$2,790,463	\$2,534,962	\$2,352,720	\$2,047,275	\$2,513,208
Supplies & Services	\$37,147	\$31,738	\$69,059	\$870	\$16,529
<b>Total General Fund</b>	<b>\$2,827,610</b>	<b>\$2,566,700</b>	<b>\$2,421,779</b>	<b>\$2,048,145</b>	<b>\$2,529,737</b>

## FY 2023 SCHOOL REPORT CARD

Kelly School

216 West Street

(413) 534-2078

### Overall Performance Summary\*

**Accountability & Assistance Level**

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

**Accountability Percentile**

2

**Progress**

68% - Substantial progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	471.7	473.7	473.1	475	474.2	n/a	n/a	n/a	472.8
Math SS	471.7	473.5	467.5	469.1	470.3	n/a	n/a	n/a	460.1
Science CPI/SS	32.3	35.2	38.6	41.7	39.6	n/a	n/a	n/a	469.3
ELA SGP	n/a	50	43.5	50	51.1	n/a	n/a	50	39.1
Math SGP	n/a	50	34.1	50	43.5	n/a	n/a	50	31.8

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	85.7	% Limited English Proficient	22.6	% of Teachers Licensed	92.7
Enrollment	336	% Special Education	21.1		
Graduation Rate	n/a	% First Language not English	43.2	% of teachers without waiver or provisional license	92.6
Dropout Rate	n/a	High Needs	96.1		
In-School Suspension Rate	**	% African American	3.0		

<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.0</b>	<b>Student / Teacher Ratio</b>	<b>12.3 to 1</b>
<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>94.6</b>		
<b>Unexcused Absences &gt;9</b>	<b>10.6</b>	<b>% White</b>	<b>2.1</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					



## Lt Elmer J McMahon School

**Principal: Rebecca Thompson**

**Number of years as principal at current school: 3**

**Number of years as a principal in HPS: 3**

**Number of years employed with HPS: 3**

**Education background: B.A.UMASS Dartmouth, M.Ed Worcester State University**

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### MESSAGE FROM THE PRINCIPAL

Welcome to Lt. Elmer J. McMahon School where our mission is ambitious and clear. We are committed to educate all of our PreK to 8th Grade Scholars for success in high school, college and career through challenging academics, positive character development and high expectations.

In our school, we value respect, excellence, academic achievement, perseverance, and collaboration with families and community as steps to success. We are confident that all McMahon scholars can and will achieve.

## FY 2023 STAFFING & BUDGET SUMMARY

McMahon School

75 Kane Road

(413) 534-2062

Grades Served:

FY 2023 Est. Enrollment: 331

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	30	31	31	34.5	37
Paraprofessionals	19	15	21	20	21
Principals/Administrators	2	2	2	2	3
Clerks	1.5	1	1	1	1
Counselors	2	2	2	2	2
Nurses	1	1	1	1	2
Custodians	3	3	3	3	3
Other	2.5	4	2	4	5
<b>All Funds Staffing Total</b>	<b>61</b>	<b>59</b>	<b>63</b>	<b>67.5</b>	<b>74</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$2,664,334	\$2,681,132	\$2,793,677	\$2,795,670	\$3,037,289
Supplies & Services	\$19,698	\$6,000	\$14,663	\$24,510	\$60,024
<b>Total General Fund</b>	<b>\$2,684,032</b>	<b>\$2,687,132</b>	<b>\$2,808,340</b>	<b>\$2,820,180</b>	<b>\$3,097,313</b>

## FY 2023 SCHOOL REPORT CARD

McMahon School

75 Kane Road

(413) 534-2062

### Overall Performance Summary\*

#### Accountability & Assistance Level

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

Accountability Percentile

6

Progress

65% - Substantial progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	486.6	488.6	488.5	490.4	489.4	n/a	n/a	n/a	481.3
Math SS	478.5	480.3	480.2	481.8	479.8	n/a	n/a	n/a	470.6
Science CPI/SS	49.2	52.1	50.5	53.6	58.8	n/a	n/a	n/a	475.6
ELA SGP	n/a	50	45.7	50	52.5	n/a	n/a	50	36.5
Math SGP	n/a	50	40.5	50	44	n/a	n/a	50	33.6

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	91.7	% Limited English Proficient	12.4	% of Teachers Licensed	100
Enrollment	363	% Special Education	31.4		
Graduation Rate	n/a	% First Language not English	23.4	% of teachers without waiver or provisional license	96.7
Dropout Rate	n/a	High Needs	80.2		
In-School Suspension Rate	**	% African American	2.5		

<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>2.5</b>	<b>Student / Teacher Ratio</b>	<b>12.1 to 1</b>
<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>59</b>		
<b>Unexcused Absences &gt;9</b>	<b>7</b>	<b>% White</b>	<b>33.9</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					



## Lawrence FSCS Pre-K - 3 Campus

**Principal: Catherine Hourihan**

**Number of years as principal at current school: 10 years**

**Number of years as a principal in HPS: 10 years**

**Number of years employed with HPS: 31 years**

**Education background: B.A. UMass, MAT Our Lady of the Elms**

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### MESSAGE FROM THE PRINCIPAL

Welcome to Lawrence School! I am honored to serve with exceptional Educators in providing Students and Families with care and guidance in this safe and supportive learning environment. A quote that we live by is, we will do “whatever it takes” for students to become critical thinkers and problem solvers. Through shared leadership, we are making successes possible for all our students.

I have the privilege of working with positive and productive Educators, who dedicate themselves each day to providing quality educational experiences for our students. To ensure students are on a successful path to middle school, high school, and college or career options, all Lawrence PreK-3 Students will read on or above grade level, master foundational skills and problem-solving, and develop critical thinking and positive character.

The Lawrence Community achieves its mission of ensuring the elementary success of every student by providing a quality education based on four core values about teaching and learning.

We believe in **determination**  
We believe in **achievement**

We believe in **respect**  
We believe in **excellence**

And, by living our Lawrence Mission and Vision, we are modeling strategies for positive behaviors in school and life. We are committed to our students, and believe they can acquire knowledge and learn the skills necessary to become productive citizens. Our students will make positive contributions to society as a result of the foundations they have received at the Lawrence School.

## FY 2023 STAFFING & BUDGET SUMMARY

Lawrence School

156 Cabot Street

(413) 534-2075

Grades Served: **PK-3**

FY 2023 Est. Enrollment: **161**

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	21.5	19	18.5	19.5	22.5
Paraprofessionals	4	4	6	7	7
Principals/Administrators	2	2	2	2	3
Clerks	1.5	1.5	1.5	1	2
Counselors	2	2	2	3	3
Nurses	1	1	1	1	1
Custodians	3.5	3.5	3.5	3.5	3.5
Other	11	11	11	8.5	9
<b>All Funds Staffing Total</b>	<b>46.5</b>	<b>44</b>	<b>45.5</b>	<b>45.5</b>	<b>51</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$1,789,333	\$1,619,136	\$1,705,006	\$1,509,204	\$1,749,488
Supplies & Services	\$32,360	\$61,581	\$10,000	\$2,411	\$8,732
<b>Total General Fund</b>	<b>\$2,088,873</b>	<b>\$1,821,693</b>	<b>\$1,680,717</b>	<b>\$1,715,006</b>	<b>\$1,758,220</b>

## FY 2023 SCHOOL REPORT CARD

Lawrence School

156 Cabot Street

(413) 534-2075

### Overall Performance Summary\*

#### Accountability & Assistance Level

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

Accountability Percentile

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Progress

61% - Substantial progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	477.7	479.7	477.5	n/a	481.7	n/a	n/a	n/a	477
Math SS	472.7	474.5	465.8	n/a	476.6	n/a	n/a	n/a	464.4
Science SS	n/a								
ELA SGP	n/a	50	n/a						
Math SGP	n/a	50	n/a						

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	81.1	% Limited English Proficient	12.4	% of Teachers Licensed	94.4
Enrollment	178	% Special Education	19.1		
Graduation Rate	n/a	% First Language not English	24.7	% of teachers without waiver or provisional license	95.5
Dropout Rate	n/a	High Needs	96.6		

<b>In-School Suspension Rate</b>	<b>**</b>	<b>% African American</b>	<b>7.9</b>	<b>Student / Teacher Ratio</b>	<b>9.9 to 1</b>
<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.6</b>		
<b>Retention Rate</b>	<b>0.7</b>	<b>% Hispanic</b>	<b>79.2</b>		
<b>Unexcused Absences &gt;9</b>	<b>15.3</b>	<b>% White</b>	<b>9.6</b>		
<b>**Rate not included -- low number of suspensions due to remote learning in SY20/21</b>					



## Metcalf School

**Principal:** Amy Burke

**Number of years as principal at current school:** 9

**Number of years as a principal in HPS:** 9

**Number of years employed with HPS:** 27

**Education background:** B.A. University of Maine, M.Ed. UMass

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### MESSAGE FROM THE PRINCIPAL

Welcome to Joseph Metcalf School. I am honored to serve with exceptional Educators in providing Students and Families with a positive community environment that fosters a love of learning and focuses on teaching the “whole child”.

The vision for the Joseph Metcalf School is to provide students with a rich, high-quality education. In our Dual Language Program that education will be taught in both Spanish and English. Children at Metcalf School will have the opportunity to become fluent speakers, readers, and writers. Our vision for our preschooler is for them to develop the skills necessary to become Kindergarten ready. All of our students will become flexible thinkers with the ability to build life-long friendships with children of different cultures and language backgrounds. Children will achieve their highest potential by having educational opportunities to develop their problem solving skills and social-emotional development making them better equipped to achieve at high levels and be on a path to success in college and career.

## FY 2023 STAFFING & BUDGET SUMMARY

Metcalf School

2019 Northampton Street

(413) 534-2104

Grades Served:

FY 2023 Est. Enrollment: 388

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	17	18.3	24	30.5	40
Paraprofessionals	12	7	8	8	12
Principals/Administrators	1	1	2	2	4
Clerks	1	1.5	1.5	1.5	2
Counselors	0.5	1	1	1.5	2
Nurses	1	1	1	2	2
Custodians	2	2	2	3	3
Other	1.5	1	0	1	1
<b>All Funds Staffing Total</b>	<b>36</b>	<b>32.8</b>	<b>39.5</b>	<b>49.5</b>	<b>66</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$1,600,991	\$1,595,421	\$2,024,488	\$2,133,135	\$3,036,488
Supplies & Services	\$12,896	\$61,580	\$11,450	\$9,652	\$47,943
<b>Total General Fund</b>	<b>\$1,613,887</b>	<b>\$1,657,001</b>	<b>\$2,035,938</b>	<b>\$2,142,787</b>	<b>\$3,084,431</b>

## FY 2023 SCHOOL REPORT CARD

**Metcalfe School**

2019 Northampton Street

(413) 534-2104

### Overall Performance Summary\*

**Accountability & Assistance Level**

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

**Accountability Percentile**

**21**

**Progress**

**79% - Meeting or exceeding targets**

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	n/a	n/a	495.3	496.3	499.3	n/a	n/a	n/a	475.9
Math SS	n/a	n/a	490.8	492.4	495.7	n/a	n/a	n/a	463.7
Science SS	n/a	475							
ELA SGP	n/a	n/a	n/a	50	35.5	n/a	n/a	50	30.3
Math SGP	n/a	n/a	n/a	50	32.3	n/a	n/a	50	30.8

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

<b>Attendance Rate</b>	<b>93.9</b>	<b>% Limited English Proficient</b>	<b>16.8</b>	<b>% of Teachers Licensed</b>	<b>92</b>
<b>Enrollment</b>	<b>298</b>	<b>% Special Education</b>	<b>18.8</b>		
<b>Graduation Rate</b>	<b>n/a</b>	<b>% First Language not English</b>	<b>38.9</b>	<b>% of teachers without waiver or provisional license</b>	<b>89.3</b>
<b>Dropout Rate</b>	<b>n/a</b>	<b>High Needs</b>	<b>67.1</b>		

<b>In-School Suspension Rate</b>	<b>**</b>	<b>% African American</b>	<b>2</b>		
<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0.0</b>	<b>Student / Teacher Ratio</b>	<b>11.3 to 1</b>
<b>Retention Rate</b>	<b>0.4</b>	<b>% Hispanic</b>	<b>71.1</b>		
<b>Unexcused Absences &gt;9</b>	<b>5.2</b>	<b>% White</b>	<b>24.5</b>		
<b>**Rate not included -- low number of suspensions due to remote learning in SY20/21</b>					



## Morgan Full Service Community School

**Principal: Steven Moguel**

**Number of years as principal at current school: 5 years**

**Number of years as a principal in HPS: 5 years**

**Number of years employed with HPS: 5 years**

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### MESSAGE FROM THE PRINCIPAL

Welcome to Morgan Full Service Community School. We will be working together, as partners, to provide the best possible education for your child in a nurturing environment that is student centered and positive. Commitment by all stakeholders is an important part of our educational process and communication is the key to assuring a successful year for your child.

We believe children should learn the academic and social skills to give them the traits necessary to become independent, responsible, life-long learners. While instilling the importance of the treating each other responsible and always trying to do your best we have created The Morgan Way: Be Respectful, Be Responsible, Be Safe.

Through a culture of excellence, intentional planning and demanding tasks, Morgan School educates students in grades PK-4 for success in middle school and beyond.

## FY 2023 STAFFING & BUDGET SUMMARY

**Morgan School**

596 South Bridge Street

(413) 534-2083

**Grades Served:** PK-5

**FY 2023 Est. Enrollment:** 318

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	20	24.6	24.1	27.1	32
Paraprofessionals	15	21	23	20.5	21
Principals/Administrators	2	2	2	2	3
Clerks	2	2	2	2	2
Counselors	1	1	2	2	2
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	3	4	5	5.5	6
<b>All Funds Staffing Total</b>	<b>58.5</b>	<b>48</b>	<b>59.6</b>	<b>64.1</b>	<b>71</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$2,137,141	\$2,504,116	\$2,556,184	\$2,544,522	\$2,963,823
Supplies & Services	\$30,908	\$68,225	\$52,306	\$57,038	\$20,669
<b>Total General Fund</b>	<b>\$2,168,049</b>	<b>\$2,572,341</b>	<b>\$2,608,490</b>	<b>\$2,601,560</b>	<b>\$2,984,492</b>

## FY 2023 SCHOOL REPORT CARD

Morgan School

596 South Bridge Street

(413) 534-2083

### Overall Performance Summary\*

<b>Accountability &amp; Assistance Level</b>	All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.			
	<b>Accountability Percentile</b>	4	<b>Progress</b>	49% - Moderate progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	481.1	483.1	482.1	489.1	491	n/a	n/a	n/a	478.2
Math SS	477.9	479.7	479	481.3	479	n/a	n/a	n/a	457.7
Science CPI	44.1	47	48.4	n/a	n/a	n/a	n/a	n/a	n/a
ELA SGP	n/a	50	44.8	50	30.3	n/a	n/a	n/a	n/a
Math SGP	n/a	50	43.4	50	44.7	n/a	n/a	n/a	n/a

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

### Student Data

### Teacher Data

Attendance Rate	81.0	% Limited English Proficient	17.8	% of Teachers Licensed	100
Enrollment	276	% Special Education	26.4		
Graduation Rate	n/a	% First Language not English	34.1	% of teachers without waiver or provisional license	94.8
Dropout Rate	n/a	High Needs	96.4		
In-School Suspension Rate	**	% African American	5.1		

<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0</b>	<b>Student / Teacher Ratio</b>	<b>14.3 to 1</b>
<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>92</b>		
<b>Unexcused Absences &gt;9</b>	<b>13.3</b>	<b>% White</b>	<b>2.9</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					



## Peck School

**Principal:** Sarita Graveline

**Number of years as principal at current school:** 5 Years

**Number of years as a principal in HPS:** 5 Years

**Number of years employed with HPS:** 5 Years

**Education background:** B.A. Mount Holyoke College, M.Ed. UMass

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### MESSAGE FROM THE PRINCIPAL

Welcome! Our commitment at Peck Full Service Community School is to provide a safe and intellectually challenging environment that will empower students to become innovative thinkers, problem solvers and lifelong learners. We aim to inspire future leaders that are equipped to be agents of change in their communities and beyond.

Our Peck mission is rooted in promoting their intellectual development, creativity, personal accountability, mutual respect, and a commitment to service through developing them in small, personalized, community-oriented settings that support them to rise to the challenges and duties of community citizenship and leadership. We have high expectations for all students, and are committed to supporting their academic, social, and emotional needs as unique individuals. Strong positive relationships between staff, students, and families will be integral to our collective success.

At Peck, our program offers core academic classes, specials classes, an advisory program, targeted student interventions, personalized learning opportunities and enrichments as we work to provide a well-rounded student experience. During the year we will be opening our doors at a variety of events and we welcome all of our extended Peck family to come join us and see what's new. We look forward to the involvement of our families and the growth of our students. We can't wait to see you!

## FY 2023 STAFFING & BUDGET SUMMARY

**Peck School**

1916 Northampton Street

(413) 534-2040

**Grades Served:** 4-8

**FY 2023 Est. Enrollment:** 210

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	30	24	27	27	30
Paraprofessionals	13	9	8	9	14
Principals/Administrators	4	4	3	3	3
Clerks	2	2	1	1	1.5
Counselors	2	2	4	5	6
Nurses	2	2	2	2	2
Custodians	7	6.5	7	7	7
Other	13	16	17	17	16
<b>All Funds Staffing Total</b>	<b>71.5</b>	<b>73</b>	<b>65.5</b>	<b>71</b>	<b>79.5</b>

### School Budget

General Fund	2018	2019	2020	2021	2022
Personnel Services	\$3,091,753	\$2,789,279	\$2,167,849	\$2,335,473	\$2,477,594
Supplies & Services	\$31,407	\$23,247	\$47,004	\$10,912	\$41,376
<b>Total General Fund</b>	<b>\$3,123,160</b>	<b>\$2,812,526</b>	<b>\$2,214,853</b>	<b>\$2,346,385</b>	<b>\$2,518,970</b>

## FY 2023 SCHOOL REPORT CARD

Peck School

1916 Northampton Street

(413) 534-2040

### Overall Performance Summary\*

#### Accountability & Assistance Level

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

Accountability Percentile

1

Progress

44% - Moderate progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	474.2	476.2	471.7	473.6	470.9	n/a	n/a	n/a	468.4
Math SS	471.7	473.5	469.4	471	466	n/a	n/a	n/a	461.5
Science CPI/SS	33.5	36.4	38.1	41.2	37	n/a	n/a	n/a	468.3
ELA SGP	n/a	50	39.3	50	40.8	n/a	n/a	50	25.4
Math SGP	n/a	50	36.6	50	33.2	n/a	n/a	50	26.4

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	84.8	% Limited English Proficient	35.3	% of Teachers Licensed	100
Enrollment	255	% Special Education	37.3		
Graduation Rate	n/a	% First Language not English	52.5	% of teachers without waiver or provisional license	87.6
Dropout Rate	n/a	High Needs	96.9		

<b>In-School Suspension Rate</b>	<b>**</b>	<b>% African American</b>	<b>2.7</b>		
<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>0</b>	<b>Student / Teacher Ratio</b>	<b>10.5 to 1</b>
<b>Retention Rate</b>	<b>0.4</b>	<b>% Hispanic</b>	<b>89.8</b>		
<b>Unexcused Absences &gt;9</b>	<b>11.9</b>	<b>% White</b>	<b>5.9</b>		
**Rate not included -- low number of suspensions due to remote learning in SY20/21					

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## Lt. Clayre Sullivan School

**Principal: Sacha Garcia-Mailloux**

**Number of years as principal at current school: 4 Years**

**Number of years as a principal in HPS: 4 Years**

**Number of years employed with HPS: 4 Years**

**Education background:**

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### MESSAGE FROM THE PRINCIPAL

Welcome to Lt. Clayre P. Sullivan School where our mission is to provide a safe, nurturing learning environment where students engage in high-quality, culturally diverse learning experiences that support academic growth through the development of critical thinking skills, character development, and a growth mindset with pathways to high school, college, and career readiness.

Sullivan's vision is committed to creating a supportive environment where students can develop hospitality, communication, and interpersonal skills in order to engage intellectually, socially, and emotionally within their communities as productive and inspiring citizens.

Our Values are founded in MI CASA (**M**indset, **I**ntegrity, **C**itizenship, **A**wareness, **S**ervice and **A**chievement) and are supported by our

We commit to making sure that all students begin and end the day being seen, heard, and loved. We commit daily to creating the conditions where all students can access a rigorous and equitable education.

We cultivate partnerships with community agencies such as Performance Project, Baypath University, and Girl's Inc. We also have a standing Monthly Site Council meeting that includes community partners, staff, family members, and leadership members. The partnership with students comes via the Student Council committee and other communication avenues. Families receive a weekly newsletter sent out by our FACE Coordinator. Communication is key to the success of our community!

## FY 2023 STAFFING & BUDGET SUMMARY

Sullivan School

400 Jarvis Avenue

(413) 534-2060

Grades Served:

K-8

FY 2023 Est. Enrollment:

430

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	39	37	37	40.3	45
Paraprofessionals	17	20	21	21	26.5
Principals/Administrators	3	3	2	3	4
Clerks	1.5	1.5	1.5	2	2
Counselors	2	2	3	3	3
Nurses	1	3	3	3	3
Custodians	5	5	5	5	5
Other	8	5.5	7	5	5
<b>All Funds Staffing Total</b>	<b>79</b>	<b>76.5</b>	<b>77</b>	<b>82.3</b>	<b>93.5</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$3,262,588	\$3,177,868	\$3,223,616	\$3,152,756	\$3,558,063
Supplies & Services	\$44,166	\$49,928	\$33,347	\$7,266	\$18,236
<b>Total General Fund</b>	<b>\$3,484,855</b>	<b>\$3,306,754</b>	<b>\$3,227,796</b>	<b>\$3,256,963</b>	<b>\$3,576,299</b>

## FY 2023 SCHOOL REPORT CARD

Sullivan School

400 Jarvis Avenue

(413) 534-2060

### Overall Performance Summary\*

**Accountability & Assistance Level**

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

Accountability Percentile

6

Progress

43% - Moderate progress toward targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	490.1	492.1	489.9	491.8	488.4	n/a	n/a	n/a	475.6
Math SS	488.9	490.7	485.9	487.5	485.4	n/a	n/a	n/a	470.5
Science SS	58.3	61.2	58.3	61.4	54.2	n/a	n/a	n/a	469.6
ELA SGP	n/a	50	43.8	50	42.9	n/a	n/a	50	22.2
Math SGP	n/a	50	41.8	50	50.8	n/a	n/a	50	28.9

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	86.2	% Limited English Proficient	17.8	% of Teachers Licensed	100
Enrollment	461	% Special Education	25.6		
Graduation Rate	n/a	% First Language not English	37.1	% of teachers without waiver or provisional license	80.3
Dropout Rate	n/a	High Needs	88.1		

<b>In-School Suspension Rate</b>	<b>**</b>	<b>% African American</b>	<b>1.3</b>		
<b>Out-of-School Suspension Rate</b>	<b>**</b>	<b>% Asian</b>	<b>1.7</b>	<b>Student / Teacher Ratio</b>	<b>12.8 to 1</b>
<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>86.3</b>		
<b>Unexcused Absences &gt;9</b>	<b>12.3</b>	<b>% White</b>	<b>9.5</b>		
<b>**Rate not included -- low number of suspensions due to remote learning in SY20/21</b>					



## **E.N. White School**

**Principal: Karyn McDermott**

**Number of years as principal at current school: Second Year**

**Number of years as a principal in HPS: Second Year**

**Number of years employed with HPS: 18**

**Education background: Holyoke High School Graduate, University of Massachusetts-BA, American International College-M Ed**

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### **MESSAGE FROM THE PRINCIPAL**

Welcome to the EN White School. I am proud to work each day with students, families and the staff to create an extraordinary learning environment where we value relationships and support one another as we grow as a community together.

Through culturally responsive instruction, targeted supports and accountability systems for students and staff, E.N. White School ensures all PreK to grade 5 standards and have the foundations necessary to be successful in grade 6 and beyond. Our number one priority is to provide our students instruction each day that is based on a rigorous standards based curriculum that provides all students with opportunities to problem solve, engage with their peers, apply strategies learned and reflect on their learning. Second to instruction is our commitment to consistency improving the climate and culture of our school so that all students, staff, and families are involved in creating a learning environment that is positive, safe, and allows students to feel comfortable taking academic risks.

## FY 2023 STAFFING & BUDGET SUMMARY

E. N. White School

1 Jefferson Street

(413) 534-2058

Grades Served:

FY 2023 Est. Enrollment: 411

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	28	30	30	34.5	38.5
Paraprofessionals	19	27	32	34	40
Principals/Administrators	2.5	3	3	3	4
Clerks	1	1	1	1	1
Counselors	1	1	1	2	2
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	4.5	4.5	5	5	5
<b>All Funds Staffing Total</b>	<b>61</b>	<b>71.5</b>	<b>77</b>	<b>84.5</b>	<b>95.5</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	\$2,648,351	\$2,876,422	\$2,968,391	3,052,997	\$3,583,019
Supplies & Services	\$833	\$8,147	\$12,238	\$31,951	\$39,064
<b>Total General Fund</b>	<b>\$2,649,231</b>	<b>\$2,884,569</b>	<b>\$2,980,629</b>	<b>\$3,084,948</b>	<b>\$3,622,083</b>

## FY 2023 SCHOOL REPORT CARD

E. N. White School

1 Jefferson Street

(413) 534-2058

### Overall Performance Summary\*

#### Accountability & Assistance Level

All Massachusetts public schools and districts with sufficient data are classified into one of two categories: schools and districts that require assistance or intervention, and schools and districts that do not require assistance or intervention. Accountability reports include information on each district and school's performance against improvement targets, as well as information about each school's overall performance compared to other schools in the state.

Accountability Percentile

13

Progress 86% - Meeting or exceeding targets

### Accountability Targets & Actual

CPI & Growth by Subject	2017 Actual	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual
ELA SS	473.9	475.9	475.9	483.2	486.5	n/a	n/a	n/a	475.6
Math SS	471.7	473.5	473.9	477.7	480.1	n/a	n/a	n/a	470.5
Science CPI/SS	34.8	37.7	44.1	51.9	52.8	n/a	n/a	n/a	469.6
ELA SGP	n/a	50	39.3	50	59.5	n/a	n/a	50	22.2
Math SGP	n/a	50	49	50	60.1	n/a	n/a	50	28.9

\*Refer to <http://www.doe.mass.edu> for additional information as these results reflect peer groups in MA.

#### Student Data

#### Teacher Data

Attendance Rate	86.2	% Limited English Proficient	17.8	% of Teachers Licensed	100.0
Enrollment	461	% Special Education	25.6		
Graduation Rate	n/a	% First Language not English	37.1	% of teachers without waiver or provisional license	80.3
Dropout Rate	n/a	High Needs	88.1		
In-School Suspension Rate	**	% African American	1.3		
Out-of-School Suspension Rate	**	% Asian	1.7	Student / Teacher	12.8 to 1

<b>Retention Rate</b>	<b>0</b>	<b>% Hispanic</b>	<b>86.3</b>	<b>Ratio</b>
<b>Unexcused Absences &gt;9</b>	<b>12.3</b>	<b>% White</b>	<b>9.5</b>	
**Rate not included -- low number of suspensions due to remote learning in SY20/21				

## Holyoke Middle

**Principal: Rue Ratray**

**Number of years as principal at current school: 1**

**Number of years as a principal in HPS: 4**

**Number of years employed with HPS: 5**

**Education background: BA from Evergreen State College, Olympia, WA, 1998**

**MAT from Simmons College, Boston, MA, 2001**

**Currently enrolled in EdD program at Lesley University, Cambridge, MA, expected graduation 2025**

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### **MESSAGE FROM THE PRINCIPAL:**

Holyoke Middle School is proud to serve the families of sixth, seventh, and eighth-grade students for the 2022-2023 school year. We are committed to creating a learning environment where all students are able to achieve at the highest level and to provide the support our students need in order to meet those high expectations. For students who receive ESL services and students who receive services via IEPs and 504s, Holyoke Middle School is committed to providing support in a way that promotes equity and inclusion for all students. Most importantly, Holyoke Middle School is committed to working with families to create a safe and consistent learning environment for all students. We look forward to working together with families as we embark on this very important school year

## FY 2023 STAFFING & BUDGET SUMMARY

Holyoke Middle

1916 Northampton St

(413) 535-0181

Grades Served: 6-8

FY 2023 Est. Enrollment: 299

### Staffing Summary

Staffing Totals	2019	2020	2021	2022	2023
Teachers	N/A	N/A	N/A	N/A	34
Paraprofessionals	N/A	N/A	N/A	N/A	11
Principals/Administrators	N/A	N/A	N/A	N/A	4
Clerks	N/A	N/A	N/A	N/A	2
Counselors	N/A	N/A	N/A	N/A	3
Nurses	N/A	N/A	N/A	N/A	0
Custodians	N/A	N/A	N/A	N/A	0
Other	N/A	N/A	N/A	N/A	4
<b>All Funds Staffing Total</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>58</b>

### School Budget

General Fund	2019	2020	2021	2022	2023
Personnel Services	N/A	N/A	N/A	N/A	\$2,485,820
Supplies & Services	N/A	N/A	N/A	N/A	\$34,622
<b>Total General Fund</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>\$2,520,442</b>



# Appendices

## Holyoke Public Schools SY 2022-2023 CALENDAR

- 15-19 New Teacher Induction
- 23 New Staff Orientation
- 24 Convocation/District PD Day
- 25 School PD Day
- 26 School PD Day/Classroom Prep
- 29 First day of School Gr. 1-12

AUGUST 2022 (3 days)						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

FEBRUARY 2023 (15 days)						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

- 20-24 February Break
- 20 Presidents Day

- 5 Labor Day
- 6 First day of School Gr. PK-K

SEPTEMBER 2022 (21 days)						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

MARCH 2023 (22 days)						
S	M	T	W	Th	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

- 24 District PD Day

- 10 Indigenous Peoples' Day
- 31 District PD Day

OCTOBER 2022 (19 days)						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

APRIL 2023 (14 days)						
S	M	T	W	Th	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

- 7 Good Friday
- 9 Easter Sunday
- 17 Patriots Day
- 17-21 April Break

- 8 School PD Day / PK-8 Conferences
- 11 Veterans Day
- 23-25 Thanksgiving Break
- 24 Thanksgiving Day

NOVEMBER 2022 (17 days)						
S	M	T	W	Th	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

MAY 2023 (21 days)						
S	M	T	W	Th	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

- 15 School-based PD Day
- 29 Memorial Day

- 23 3 hr. Early Release
- 25 Christmas
- 26-30 Winter Break

DECEMBER 2022 (17 days)						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

JUNE 2023 (13 days)						
S	M	T	W	Th	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

- 20 Last day of school without inclement weather days
- 19 Juneteenth
- 27 Last day of school w/ S inclement weather days

- 2 Observance of New Year's Day
- 6 Three Kings Day
- 16 Martin Luther King Day
- 23 District PD Day

JANUARY 2023 (18 days)						
S	M	T	W	Th	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

- No School
- New Teachers PD Day
- All Teachers PD Day
- 3 hr. Early Release

\*Morgan, and the high schools will have additional PD hours for teachers. Additional hours will be outlined in the School Operational Plans.

## Glossary of Terms

### **Appropriation**

An authorization granted by a legislative body to incur obligations and to expend public funds for a stated purpose. The expenditure of an appropriation is usually limited in amount and time.

### **Balanced Budget**

A budget in which estimated revenues and other resources are equal to or greater than estimated expenditures.

### **Budget**

A plan of financial operations embodying an estimate of proposed expenditures for a given period and purpose and the proposed means of financing that plan.

### **Chapter 70 Aid**

Chapter 70 is the Commonwealth's school funding statute. The program seeks to ensure adequate and equitable school funding for all Massachusetts public pupils. It defines and calculates an adequate funding level for each district, given the specific grades, programs, and demographic characteristics of its students. It then determines how much of the "foundation budget" should be paid for by each city and town's property tax, based upon the relative wealth of the community. The remainder is funded by chapter 70 state aid.

### **E-Rate**

E-rate is a federal program of the Federal Communications Commission administered by the Schools and Libraries Division of the Universal Service Administrative Company that provides eligible K-12 public schools and libraries 20% to 90% discounts (NOT grants) on approved telecommunications, internet access, and internal connections costs.

### **Expenses**

Expenses represent the total cost of operations during a period regardless of the timing of related expenditures.

### **Fiscal Year**

In accordance with M.G.L. Ch. 44 §56, July 1st through June 30th constitutes the mandatory fiscal year for public school districts.

### **Fringe (Employee) Benefits**

Funds appropriated and expended to pay the employer cost of providing employee health, life, dental, and vision coverage, FICA and Medicare, and the employer portion of the Massachusetts Teachers Retirement System and the Holyoke Retirement System.

### **Food Service Fund**

A type of enterprise fund used to record financial transactions related to food service operations.

### **Foundation Budget**

Based on the Education Reform Act of 1993, a foundation budget is the Commonwealth's calculation for the *minimum* amount that a district can spend in order to provide an adequate education to students. This amount is adjusted each year to reflect the fluctuations in student enrollment, grade level population, low-income population, English language proficiency, inflation, and city income levels. Inflation is adjusted each year in accordance with M.G.L. Ch. 70 §12, so the FY 2114 inflation rate is 1.54%.

### **Function**

The basic account identifier for expenditures, it describes the activity for which a service or material is acquired.

### **Fund**

A fiscal and accounting entity with a self-balancing set of accounts recording cash and other financial resources, together with all related liabilities and residual equities or balances and charges therein, which are segregated for the purpose of carrying on specific duties.

### **Graduation Rate**

All Massachusetts public high schools and districts at the grade 9-12 level must meet or exceed the State's graduation rate standard for all reportable student groups in order to make AYP. The graduation rate is one of two criteria (the other being the fulfillment of local requirements) required by the Department as a condition for high school graduation.

### **Grants/Categorical**

Contributions or gifts of cash or other assets from another government or entity to be used or expended for a special purpose, activity, or facility.

### **No Child Left Behind (ESSA)**

Signed into law by former President George W. Bush on January 8, 2002, ESSA is the principal federal law affecting public education from kindergarten through high school. ESSA is built on four pillars: expanded local control and flexibility; doing what works based on scientific research; accountability for results; and more options for parents. The goal of ESSA is for all students to reach grade level proficiency in ELA and Mathematics by the 2013-2014 school year.

### **Non-Discretionary**

Funds appropriated and expended to pay for utilities and/or utility type expenditures. Common descriptions associated with these types of expenditures are, heat, light, and electric. Other types of expenditures, such as the fuel for the school buses, may be controlled at this level.

### **Object**

As used in expenditure classification, this term applies to the article purchased or the service obtained.

**Operating Budget**

The authorized revenues and expenditures for ongoing district services, and is the primary means by which a district is controlled.

**Pupil Enrollment**

For any budget year, the number of pupils enrolled.

**Purchased Services**

Amount paid for services rendered by persons, organizations or other agencies for a service or product required to obtain the desired results. Examples are travel allowance, heating, lawn equipment repair, printing, equipment rental, etc.

**Revenue**

Increase in governmental fund type net current assets from other than expenditure refunds and fund balance transfers.

**Required Local Contribution**

Amount that a municipality is required to pay towards the school district's foundation budget. This figure is based on the prior year required contribution, and includes some transition factors, so that the shift toward the target levels occurs over a period of several years.

**Salaries**

Funds appropriated and expended to pay the actual salaries of employees charged to a specific school or department.

**Special Revenue Funds**

All transactions for those specific revenue sources requiring separate accounting due to legal and regulatory restrictions as administrative action. Included are programs for early childhood development, job training, gifted and talented children, free lunch, and other programs.

**Student Attendance Rate**

As shown on school and district AYP reports, it is the additional AYP indicator for elementary and middle schools. Attendance rates are calculated by dividing the total number of days all students attended school by the total number of days all students were enrolled.

**Supplies**

An expenditure object within an activity, which includes all supplies that have useful life of less than one year. Amounts paid for material items that are consumed for the operation of a district. Examples are general instruction, music, language development, textbooks, dictionaries, audiovisual, tools, etc.

## What is Net School Spending?

### I. Three Components

- A. A **foundation budget** calculated for the district representing minimum spending needed. Adjusted annually to reflect changes in enrollment, demographics, inflation, and geographical wage differences.
- B. A **local contribution** or local appropriations required to meet net school spending.
- C. **Chapter 70 Aid** is the share of the foundation budget funded by the state.

### II. The Net School Spending Formula

- A. Required Net School Spending = Local Contribution + Chapter 70 Aid.

### III. Key Concepts in the Chapter 70 Formula

- A. **Foundation Enrollment** – the number of students Holyoke is responsible for educating financially as of October 1 each year.
- B. **Foundation Budget** – increases or decreases based upon the foundation enrollment and the inflation factor used by the state.
- C. **Local Contribution** is calculated by increasing the previous year’s contribution by the Municipal Revenue Growth factor and adjusting this number based upon Holyoke’s ability to pay, the latter based on the state’s aggregate wealth model.
- D. **Municipal Revenue Growth Factor** is Holyoke’s percentage increase in local revenues from one year to the next as calculated by the Department of Revenue.
- E. **The Aggregate Wealth Model** looks at both personal income wealth statistics and property wealth statistics in Holyoke.

*Actual Net School Spending includes all funds expended by the School Committee via the budget, grants, and other funds as well as certain City expenditures, excluding certain types of expenditures such as transportation, adult education, leases greater than 3 years, and long-term debt.*

### Legal Requirements for Actual Net School Spending

#### Chapter 70: Section 11. Excess funds; application to following fiscal year

**Section 11.** If in any fiscal year a district’s actual expenditure for public education is less than the amount required to be appropriated for public education pursuant to this chapter, the difference, shall be spent for public education in the following fiscal year; provided, however, that any unexpended funds, whether appropriated to the school committee account or to town accounts for expenditure to meet public

education costs, shall be deemed re-appropriated for public education in the following year without further action by the appropriating authority; provided, further, that the amount of state school aid for the following fiscal year shall be reduced by the amount said difference exceeds 5 percent of the amount required to be appropriated; and provided, further, that in any year in which additional money is required to be spent due to a spending deficiency in the prior year, if a district fails to spend the carried forward amount or under-spends its current year budget by more than 5 percent of the amount required to be appropriated for that year, state school aid in the following year shall be reduced by the entire difference between those amounts. The board shall promulgate regulations to enforce the provisions of this section.

### **CRM 603 10.06: Annual School Spending Requirements**

**(1)** The Commissioner of Education shall determine each school district's actual net school spending in the prior fiscal year and the estimated net school spending in the current year from information contained in the End-of-Year Pupil and Financial Report.

**(2)** The sum of the following expenditures for public education from local revenues and M.G.L. c. 70 school aid, reported in accordance with 603 CMR 10.04 and 10.05 and the guidelines for reporting student and financial data published by the Department, shall be considered a school district's annual net school spending for purposes of determining compliance with the requirements of M.G.L. c. 70:

- (a) District and school site administrative services and materials
- (b) Student instructional services, materials and equipment
- (c) Student support services; including attendance, health services, food services (not including the cost of food), and school security
- (d) Student activities; including athletics, performance groups and clubs
- (e) Operation and routine maintenance of school facilities and equipment
- (f) Extraordinary maintenance of school facilities (under \$150,000)
- (g) Health insurance and retirement contributions for current school district employees
- (h) Non-employee insurance
- (i) Rental or lease of land, buildings, or building space for student instruction or school Administration purposes for a period ***not exceeding three years***
- (j) Interest on short term borrowing in anticipation of revenue to fund current year operating expenses, except in a year when state aid payments to the district or municipality have been delayed or forfeited for failure to comply with student or financial data reporting

requirements;

(k) Tuition and related charges for students attending other public schools, collaborative programs, or private schools by agreement of the school committee or assignment by a State agency;

(l) Assessments, minus any reimbursements, for school choice and charter school students attending schools outside the district;

(m) The cost of health insurance for retired teachers in a school district where such costs were considered by the Department to be part of the district's net school spending in fiscal year 1994.

**(3)** The Department shall compare each school district's net school spending in the prior fiscal year with the net school appropriation required by M.G.L. c. 70, § 6 to determine the district's compliance with M.G.L. c. 70 net school spending requirements. For the purposes of this calculation, actual expenditures in the prior year by municipal departments other than the school department for school district purposes shall be used for the following expenditure categories: school district employee retirement and insurance programs, interest on short term borrowing in anticipation of revenue to fund current year operating expenses, tuition payments on behalf of resident students, and assessments for charter school and school choice students. Estimated expenditures by municipal departments other than the school department shall be deemed to be the actual expenditures in all of the other categories in which municipalities are permitted to report expenditures pursuant to 603 CMR 10.05.

**(4)** The Commissioner of Education shall, within 30 days after receipt of a district's End-of-Year Pupil and Financial Report, notify the school district superintendent and municipal officials of any prior year spending deficiency and resulting expenditure obligation carried forward into the current fiscal year pursuant to M.G.L. c. 70, § 11. In such instances, any funds remaining in the school district's account at the close of the fiscal year shall be reserved by the municipal accountant or regional school treasurer and shall be made available to the school district without further appropriation. If the amount of the prior year's net school spending deficiency is greater than the amount of the school district's unspent funds available to be carried forward, an amount sufficient to meet the carried forward spending obligation must be appropriated by the municipality or municipalities responsible for the financial support of the school district.

**(6)** If, in any fiscal year, a district's actual expenditures for public education are less than the amount required under M.G.L. c. 70 taking into consideration any permitted carry-forward, the Department shall direct the Commissioner of Revenue to reduce the district's state school aid distribution by the amounts set forth in M.G. L. c. 70, § 11. When a deduction is so taken, there shall be no corresponding reduction in the district's net school spending requirement for the current year.

## Capital Planning

The City of Holyoke has a Capital budgeting process that seeks to satisfy the capital needs of each department in the City. Holyoke Public Schools' (HPS) is organized as a department of the City, and as a result, does not have the statutory authority to issue its own debt according to M.G.L. Ch. 44 §7. As a department of the City, HPS submits its capital project requests to the City Auditor as part of the regular development process. The Auditor then brings the projects to the City's Finance Team for consideration. The Mayor and the City Council must authorize all capital expenditures requiring debt service. While HPS cannot issue its own debt, it is the largest department in the City with over 11 buildings to operate and/or maintain.

According to financial ordinances of the City, a capital project is a fixed facility, object, or asset costing more than \$10,000 with an estimated useful life of five years or more. Projects and assets that do not meet both of these criteria are considered operating expenses and, therefore, included in the operating budget. The goal is to improve existing infrastructure, extend its useful life, or build or acquire new capital assets. This is considered an investment because the money expended is used to reduce costs and/or improve services over a multi-year timeframe.

The HPS has significant projects in the near future, for a list of these see below.

- MSBA Core Project: The Holyoke Public Schools has submitted a core project to replace the Peck School. After an override vote to fund 2 middle schools failed, we hope to partner with the MSBA and the City to build one new middle school that will allow us to provide state of the art education to our middle school population and move away from the K-8 model.

For the district's full 5-year capital plan that was last updated in 2019, see the following pages.

	2020	2021	2022	2023	2024	Totals
<b>Dean Tech</b>						
<b>Bleacher replacement</b>						
Bleachers are original to the building with many worn features and some mechanical difficulties		\$ 87,550				\$ 87,550
<b>Boiler Replacement</b>						\$ -
Cast iron boilers are 32 years old and have been cited by insurance inspectors as being at the end of their life				\$ 772,500		\$ 772,500
<b>Gym floor replacement</b>						\$ -
Gym floor has had numerous repairs and suffers from deterioration to the underside of the floor in large sections due to moisture from beneath the floor.		\$ 309,000				\$ 309,000
<b>HVAC rooftop unit replacement</b>						\$ -
Rooftop HVAC units are at the end of useful life and require frequent repairs to keep functioning					\$ 1,545,000	\$ 1,545,000
<b>Interior Stair Tread Replacement</b>						\$ -
Stair treads and risers are original to the building and are worn and in need of replacement.		\$ 72,100				\$ 72,100
<b>Parking lot repaving,</b>						\$ -
Parking lot has numerous potholes and cracks and needs repaving		\$ 123,600				\$ 123,600
<b>Plumbing shut off valve replacement</b>						\$ -
Plumbing shut offs were not installed widely throughout the building and those that are of an older style that are prone to failure				\$ 25,750		\$ 25,750
<b>Shops LED Lighting upgrade</b>						\$ -
Needed to save 60% compared to the inefficient metal halide bulbs	\$ 206,000					\$ 206,000
<b>Donahue</b>						
<b>Clock/Phone/Intercom replacement</b>						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 103,000	\$ 103,000
<b>HVAC rooftop unit replacement and conversion to gas add A/C</b>						\$ -
Building is currently heated by electrically fired rooftop air handlers. This conversion to gas heat would save approximately 25%/year in heat costs. Pending removal of the current HG & E gas moratorium.	\$ 206,000					\$ 206,000
<b>Lighting Upgrade</b>						\$ -
Existing fluorescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current usage.	\$ 199,449					\$ 199,449
<b>Replace old wing plumbing fixtures and replace shut</b>						\$ -
Sinks are original from 1974. Water shutoffs do not work and we are required to shut the water off to the building to do simple repairs.			\$ 92,700			\$ 92,700
<b>Roof replacement</b>						\$ -
1989 Addition eligible in 2019	\$ 1,648,000					\$ 1,648,000
<b>Smoke Detector replacement</b>						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 30,900					\$ 30,900
<b>Water heater replacement and conversion to gas fired</b>						\$ -
Currently electrically heated. Conversion to gas fired unit would offer 25% savings. Current heater is 45 years old and at the end of its useful life.	\$ 128,750					\$ 128,750
<b>Window replacement</b>						\$ -
Windows in original wing are 46 years old, drafty and energy inefficient		\$ 4,120,000				\$ 4,120,000

	2020	2021	2022	2023	2024	Totals
<b>E.N. White</b>						\$ -
<b>Clock/Phone/Intercom replacement</b>						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 103,000	\$ 103,000
<b>Door replacement- interior/exterior</b>						\$ -
Many doors are original from 1958 and have hardware and security issues		\$ 113,300				\$ 113,300
<b>Lighting Upgrade</b>						\$ -
Existing flourescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current useage.	\$ 164,800					\$ 164,800
<b>Plumbing fixture replacement shut off valve replacement old wing</b>						\$ -
Sinks are original from 1958. Water shutoffs do not work and we are required to shut the water off to the building to do simple repairs.		\$ 133,900				\$ 133,900
<b>Roof replacement</b>						\$ -
1989 Addition eligible in 2019		\$ 1,545,000				\$ 1,545,000
<b>Smoke Detector replacement</b>						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 25,750					\$ 25,750
<b>Window replacement</b>						\$ -
Current windows were replaced in 1089 with building				\$ 3,605,000		\$ 3,605,000
<b>Holyoke High</b>						\$ -
<b>Roof replacement</b>						\$ -
Eligible in 2025					\$ 2,369,000	\$ 2,369,000
<b>Kelly</b>						\$ -
<b>A/C chiller addition</b>						\$ -
Needed to cool classroom s throughout the school.		\$ 309,000				\$ 309,000
<b>Building Facade replacement</b>						\$ -
Summer 2023				\$ 257,500		\$ 257,500
<b>Classroom door/hardware replacement</b>						\$ -
Classroom doors are damaged and not ADA accessible					\$ 123,600	\$ 123,600
<b>Classroom univent replacement</b>						\$ -
Classroom univents are original from 1974 and do not comply with todays fresh air standards		\$ 618,000				\$ 618,000
<b>Clock/Phone/Intercom replacement</b>						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.				\$ 103,000		\$ 103,000
<b>Elevator ADA Upgrades</b>						\$ -
Needed to accomodate those in wheelchairs to the current code requirements				\$ 63,654		\$ 63,654
<b>Library air conditioning rooftop</b>						\$ -
Needed to cool the large common central library/dome		\$ 82,400				\$ 82,400
<b>Lighting Upgrade</b>						\$ -
Existing flourescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current useage.	\$ 175,100					\$ 175,100
<b>Plumbing fixture replacement shut off valve</b>						\$ -
Classroom Plumbing faucets, sinks and shutoffs are beyond repair. Many have been shut off due to leakage.		\$ 123,600				\$ 123,600
<b>Roof replacement</b>						\$ -
Eligible in 2025					\$ 1,339,000	\$ 1,339,000
<b>Window replacement</b>						\$ -
Summer 2019	\$ 4,944,000					\$ 4,944,000

	2020	2021	2022	2023	2024	Totals
<b>McMahon</b>						\$ -
<b>Ceiling Tile replacement</b>						\$ -
Ceiling tiles are damaged and unsightly		\$ 123,600				\$ 123,600
<b>Classroom door/hardware replacement</b>						\$ -
Classroom doors and hardware are not ADA compliant and need replacement				\$ 82,400		\$ 82,400
<b>Clock/Phone/Intercom replacement</b>						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 92,700	\$ 92,700
<b>Electrical upgrade</b>						\$ -
Current electrical capacity of the building is at its maximum power factor and features obsolete components which are no longer U.L. certified					\$ 128,750	\$ 128,750
<b>Gym floor replacement</b>						\$ -
Asbestos flooring needs to be removed and replaced with a suitable gym flooring material				\$ 154,500		\$ 154,500
<b>HVAC replacement</b>						\$ -
removal and replacement of steam system with new energy efficient hot water system		\$ 1,442,000				\$ 1,442,000
<b>Lighting Upgrade</b>						\$ -
Existing flourescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current useage.	\$ 82,400					\$ 82,400
<b>Roof replacement</b>						\$ -
Eligible in 2026					\$ 875,500	\$ 875,500
<b>Window replacement</b>						\$ -
Existing windows are drafty, non-operable and energy	\$ 2,163,000					\$ 2,163,000
<b>Morgan</b>						\$ -
<b>HVAC rooftop unit gym, air handler replacement A/C</b>						\$ -
Many rooftop units are original to the building and repair parts are obsolete		\$ 1,751,000				\$ 1,751,000
<b>Lighting Upgrade</b>						\$ -
Existing flourescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current useage.	\$ 133,900					\$ 133,900
<b>Replace gym floor</b>						\$ -
The existing wood flooring has been sanded numerous times and is worn and damaged in numerous areas				\$ 154,500		\$ 154,500
<b>Roof replacement</b>						\$ -
1989 Addition eligible for roof replacement in 2019		\$ 1,545,000				\$ 1,545,000
<b>Smoke Detector replacement</b>						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 25,750					\$ 25,750
<b>Window replacement</b>						\$ -
Summer 2019	\$ 3,605,000					\$ 3,605,000

	2020	2021	2022	2023	2024	Totals
<b>Systemwide Schools</b>						\$ -
<b>Install Upgrade Servers</b>						\$ -
Ensure servers are up to date for technology	\$ 412,000					\$ 412,000
<b>Replace 1998 Ford Explorer (#16)</b>						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations					\$ 47,316	\$ 47,316
<b>Replace 1998 Intern'l Dump (#12)</b>						\$ -
Truck is at the end of its useful life			\$ 101,391			\$ 101,391
<b>Replace 2002 Ford Escape</b>						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations	\$ 40,556					\$ 40,556
<b>Replace 2004 Ford Explorer (#14)</b>						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations					\$ 43,531	\$ 43,531
<b>Security Cameras</b>	\$ 244,007					\$ 244,007
<b>Sullivan</b>						\$ -
<b>Clock/Phone/Intercom replacement</b>						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 103,000	\$ 103,000
<b>Door replacement- interior/exterior</b>						\$ -
Classroom doors and hardware are not ADA compliant and need replacement					\$ 164,800	\$ 164,800
<b>Gym floor replacement</b>						\$ -
Asbestos flooring needs to be removed and replaced with a suitable gym flooring material					\$ 154,500	\$ 154,500
<b>HVAC replacement- classroom univents, A/C chiller addition rooftop unit replacement</b>						\$ -
Original stem system is inefficient obsolete by industry standards, prone to leaks in the tunnels below the classrooms and in need of major repairs		\$ 1,854,000				\$ 1,854,000
<b>Lighting Upgrade</b>						\$ -
Existing flourescent light fixtures are inefficient and should be upgraded to L.E.D. lighting with an annual savings of over 50% of the current useage.	\$ 185,400					\$ 185,400
<b>Plumbing fixture replacement shut off valve replacement, old/middle wing</b>						\$ -
Sinks are original from 1963. Water shutoffs do not work and we are required to shut the water off to the building to do simple repairs.		\$ 185,400				\$ 185,400
<b>Roof replacement</b>						\$ -
1989 Addition eligible in 2019	\$ 2,575,000					\$ 2,575,000
<b>Smoke Detector replacement</b>						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 30,900					\$ 30,900
<b>Window replacement</b>						\$ -
Summer 2019	\$ 6,386,000					\$ 6,386,000
<b>Grand Total</b>	<b>\$23,618,722</b>	<b>\$14,544,513</b>	<b>\$200,157</b>	<b>\$5,224,873</b>	<b>\$7,198,769</b>	<b>\$50,756,705</b>

# Holyoke Public Schools

## Fiscal Year 2023

*A Pathway for Every Student*

