



Holyoke Public Schools Operating Budget

Fiscal Year 2024



HOLYOKE PUBLIC SCHOOLS
57 Suffolk Street, Holyoke MA 01040



Central Office:
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HOLYOKE PUBLIC SCHOOLS

JUNTOS PODEMOS | TOGETHER WE CAN

July 1, 2023 - June 30, 2024

Fiscal Year 2024 Operating Budget

School Committee Members

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Mildred Lefebvre, Vice Chairperson, At Large
Erin Brunelle, At Large
Gustavo O. Romero, Ward 1
Rosealee Tensley Williams, Ward 2
Yadilette Rivera Colon, Ward 3
Irene Feliciano-Sims, Ward 4
John G. Whelihan, Ward 5
William R. Collamore, Ward 6
Ellie Wilson, Ward 7

Anthony W. Soto, Superintendent

Special thanks to:

Chief Financial Officer

Mickey Buhl

Incoming Chief Financial and Strategy Officer

Erin Linville

Director of Budgeting & Accounting

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Budget Team

Amanda Smith, Budget Manager

Elizabeth Simpson, Director of Grants and Philanthropy

Additional Team Members

Emily Beebe, Data Analyst

Jennie Oesterreicher, Director of Communications

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Samantha Garcia, Executive Assistant to the Superintendent

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



HOLYOKE PUBLIC SCHOOLS

JUNTOS PODEMOS | TOGETHER WE CAN

A Message from Superintendent Anthony Soto

As your Superintendent, I am exceptionally honored to share the Holyoke Public Schools (HPS) recommended budget for FY 2024. The recommended budget of \$122.2 million represents an increase of \$8.7 million (7.7%) from the FY 2023 final budget.

Last August, I released our strategic plan, *Moving Forward Together*, which built on the strengths of our past, while serving as a call to action to dramatically and urgently accelerate student learning. More than 1,500 staff, family members, students, and community members contributed to the development of the plan. Our vision is clear. We want to be a high-performing school system where students reach their full potential, educators inspire, families are partners, and the community thrives.

An effective strategic plan must be continuously revisited to ensure that we are living up to the promises of the vision and mission, executing the strategies, and achieving our goals. This school year, we solicited input from all stakeholders to make sure that we are on the right path and make course adjustments as needed.

The budget must be structured to allow us to achieve our strategic plan, and I am proud to say that this budget accomplishes just that. This budget invests in our five multiyear strategies in the following ways.

Early Literacy

- Continue to develop teachers' knowledge and expertise in early literacy practices.
- Provide sufficient coaching support and intervention resources to support our youngest learners.

Learning Experiences

- Invest in a new grades 3-5 English and Spanish Language Arts curriculum.
- Continue to expand dual language programming, including into high school.
- 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.

Whole Child

- Provide Art and Music in every school and additional enrichment opportunities that reflect reflects students' and families' interests.
- Continue to invest in social emotional learning and mental health supports.
- Ensure every school is allocated adequate counselors and student support teams to meet students' needs.

Inclusion

- Invest in leadership development training focused on inclusive practices, especially for students with disabilities and students who are English Learners.
- Develop staffing models in elementary and middle school with core content, special education, and English Learner teachers collaborating together.
- Offer the new middle school schedule to help promote collaboration, inclusion and expanded opportunities for students.

Educator Development

- Continue to strengthen teacher practice through the implementation of high quality, differentiated professional development aligned to HPS priorities.
- Invest in an Executive Director of Diversity, Equity, and Inclusion who will lead equity-driven professional development and also support our Family and Community Engagement Team.
- Revamp the Induction Program to provide more opportunities for new teachers to grow and develop.

Thank you for taking the time to learn more about the Holyoke Public Schools budget. Former President Barack Obama said, "a budget is more than just a series of numbers on a page; it is an embodiment of our values." I hope that, in this budget and in our work, you see our core beliefs lived out.

- 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 for themselves and each other.
- Trusting relationships lead to successful partnerships.
- Our equity commitments are enacted in our daily work.

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 2024.

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 2024 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 2024, the Superintendent will adopt a \$122.2 million general operating budget, representing a 7.7% increase over FY 2023. This is the second year of a large increase in our general fund budget due to the change in state education funding laws driven by the Student Opportunity Act (SOA). The SOA was passed in 2019 and increases funding for schools, especially schools who serve a higher proportion of students who are economically disadvantaged, students who are English learners, and/or students with disabilities. FY 2024 is the third year of a six-year implementation of SOA. Given that other factors stay consistent, we anticipate that SOA will continue to grow district budgets for fiscal years 2025, 2026, and 2027. After that, we should expect level funding in the annual revenue increases.

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 Senate 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 \$111.8 million, which represents an increase of \$8.5 million from the previous year.

HPS STRATEGIC PLAN

In August 2022, Superintendent Anthony Soto released a multiyear strategic plan, after engaging in an extensive and thorough entry plan and strategic plan process in his first year as Superintendent. More than 400 staff, family members, students, and community members have contributed to the development of the strategic plan, in addition to the 1,150+ people who contributed to the entry plan process. As one strategic planning steering committee member shared, this strategic plan was developed “by Holyokers, with Holyokers, for Holyokers.”

Our strategic plan, *Moving Forward Together*, builds on the strengths of our past, while serving as a call to action to dramatically and urgently accelerate student learning. This requires thinking differently about how we teach, how we work together, and how we support students’ well-being. In particular, the strategic plan seeks to:

- Ensure students are grade-level ready, especially by strengthening literacy instruction;
- Strengthen 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; and
- Create a positive learning environment for all, including developing a more comprehensive approach to addressing students’ social emotional and mental health needs.

In our strategic plan, our vision paints a picture for the future. The mission explains why we exist. And our core beliefs are the values that guide our work and influence how we make decisions.

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.






An important part of the strategic plan is the Learner Profile, which describes the most important attributes and skills a student develops throughout their educational career in HPS, whether they are a student in PreK, elementary, middle, or high school. Beyond the academic standards a student develops, the Learner Profile paints a picture of the type of person a Holyoke student is now and who they will be supported to become.

Holyoke Students

-  **R**eflect and persist
-  **E**mbrace empathy and kindness
-  **A**pply critical thinking
-  **C**ommunicate effectively
-  **H**elp ourselves and others

Estudiantes de Holyoke



-  **R**eflexionamos y persistimos
-  **E**stablecemos la empatía y amabilidad
-  **A**plicamos el pensamiento crítico
-  **C**omunicamos efectivamente
-  **H**acemos lo posible para ayudarnos a nosotros mismos y a otros

Importantly, the strategic plan outlines strategic priorities. All our work is centered around achieving these strategic priorities. Each strategic priority has individual multiyear strategies. And, each year, we develop benchmarks and project plans that articulate the critical work for that school year.

Priorities



- **Early Literacy:** Ensuring all students in grades PreK-3 read at grade-level.
- **Learning Experiences:** Ensuring schools provide rigorous, culturally responsive instruction in all content areas 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.

A strategic plan advisory committee member suggested our motto: ***Juntos Podemos! Together we can!***

Accomplishments

Our accomplishments are organized by our five strategic priorities. Our accomplishments reflect successes since the start of receivership in 2015, with a more significant emphasis on more recent accomplishments.

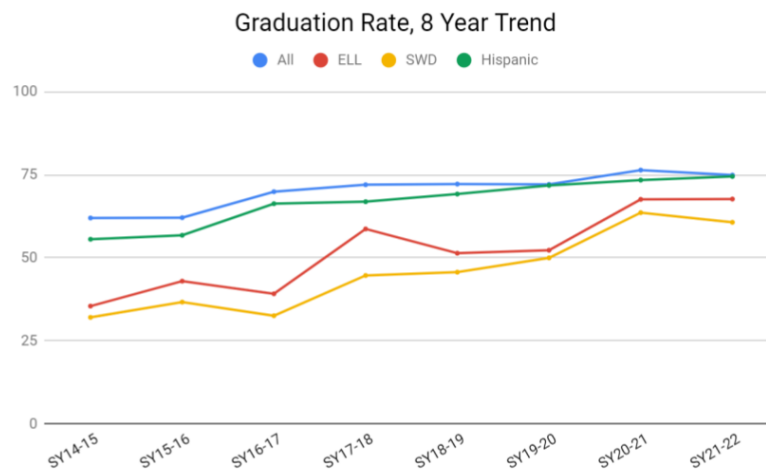
Early Literacy

- We have nearly doubled access to pre-kindergarten with approximately 500 seats now available. Nearly all the expansion was due to adding a full-day PreK option, which is the most sought-after opportunity for our families. Our data shows that students enrolled in full-day PreK have stronger attendance in PreK and are more successful in kindergarten.
- We are in the process of implementing an early literacy plan that includes a high-quality curriculum, effective teaching strategies, and development of deep early-literacy content knowledge, with support from Hill for Literacy.
- We are in the process of developing stronger data to support early literacy instruction. Teachers and interventionists use STARS and DIBELS to monitor progress and small-group interventions.

Learning Experiences

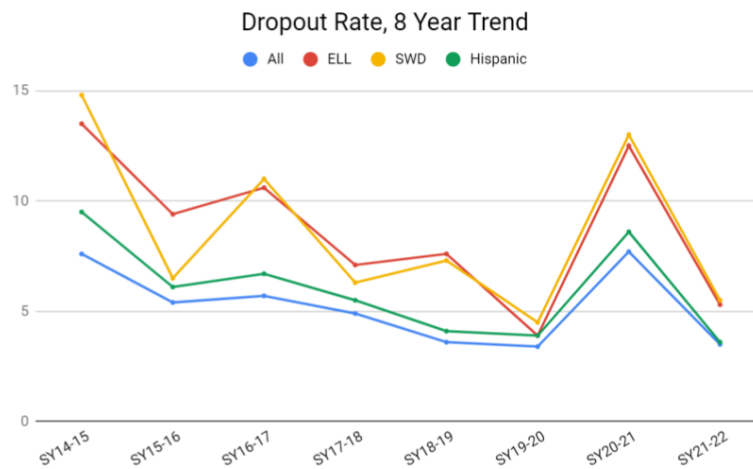
- We have improved our graduation rates, with a 16.3-point increase in the graduation rate to 76.4% in 2021 (and 74.9% in 2022, along with a reduction in the drop-out rate to an average of 5% during the time of receivership. Over the same period, we have seen a 32.2 point increase in graduation rates for EL students (67.7% in 2022) and 28.6 point increase for SWD (60.7%)

Graduation rates are increasing, especially for students who are MLLs and SWD



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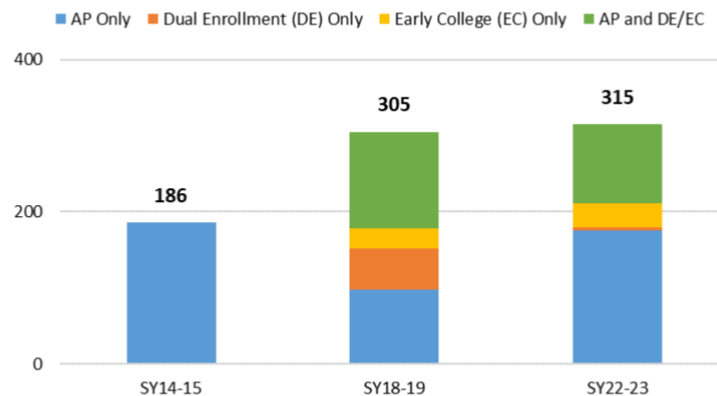
Drop-out rate has decreased



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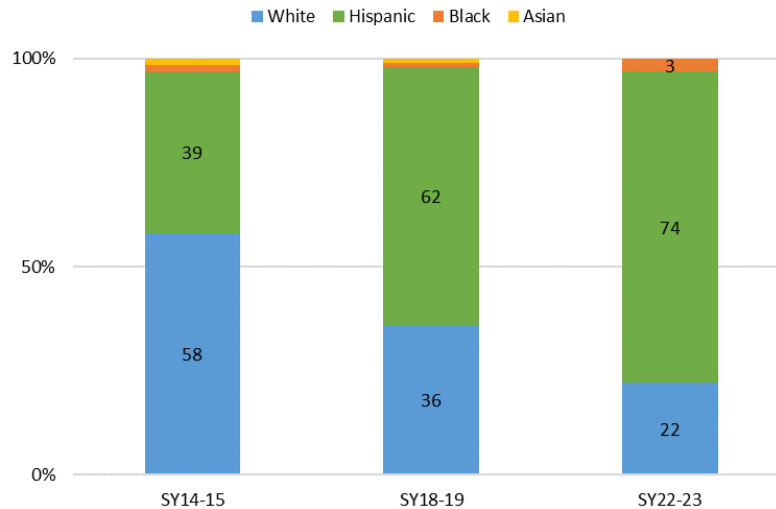
- We have seen improved access to advanced coursework, including dual enrollment and early college. Currently, 53% of our grade 11 and 12 students are enrolled in advanced coursework. Holyoke also opened access and actively recruited more students, especially students of color, to participate, so now 87% of students in advanced coursework are Latino/Latina.

Enrollment in Advanced Coursework has increased significantly...



8

...and more closely reflects our student demographics



9

- We have accelerated students' academic performance, as measured by HPS making "substantial progress" towards performance targets on the 2019 accountability system (the last year of pre-pandemic data).
- We are moving from a K-8 school system to separate elementary and middle schools by fall 2023 to customize the student learning experience, provide more support, and reduce inefficiencies. More than 2,000 people had a voice in the decision process.
- We are revitalizing the HHS Dean Campus, where students enroll in CVTE programming. Many students apply each year, and we have a waitlist. We are increasing access to work-based learning experiences, including co-op placements.
- We are increasing the relevance of learning, especially in high school, with the development of theme-based academies. Holyoke High School North offers linked-learning academies, allowing students to develop a personalized learning path toward college, career, or both. The academies provide a frame of reference for learning and field experiences that connect academics to the work of the world.
- In establishing our Opportunity Academy, HPS offers a set of alternative high school pathways that allow students to continue or restart on a pathway to a diploma if they are not succeeding at Holyoke High School. OA has greatly contributed to the decrease in our drop-out rate, from 7.2% in SY14-15 to 3.5% in SY21-22.

Inclusion

- We are continuing to champion biliteracy and biculturalism and a supportive learning environment for multilingual students through our dual language program. Almost 700 PreK-8 students, representing nearly 20% of students, are enrolled in the dual language program, which is now expanding to the high school. Eleven graduated last year with a Seal of Biliteracy on their diplomas, while this year eight graduating seniors have earned a Seal of Biliteracy.
- We are seeing a reduction in students with emotional/behavioral disabilities in sub-separate classrooms, with more of a focus on meeting their needs in the general education setting. (Data to support: 4 fewer TIP classrooms in SY23 than in SY17).
- Select schools (especially Donahue, Lawrence, and Opportunity Academy) have piloted more inclusionary practices, and the staff mindset around inclusion has shifted. For example, at Lawrence School, students with disabilities had significant growth in STAR this school year due to more time spent in core content.
- We are in the process of developing a plan for SY24 to strengthen inclusionary practices, which includes more than 70 HPS learners participating in a year-long Inclusive Schools Leadership Institute offered through our partner Relay Graduate School of Education.
- We are strengthening systems so that all students are in the classroom for core instruction and receive pull-out services during intervention blocks. Systems will continue to be strengthened in the middle school schedule next year, where students will have an intervention/acceleration period and two enrichment/essentials periods.
- During the COVID-19 pandemic, we prioritized in-person instruction for students with disabilities and multilingual learners.

Whole Child

- We maintained a thoughtful approach to managing the COVID-19 pandemic, prioritizing the health and well-being of students and staff.
- We supported strong family partnerships and communication through expanding our language access department, which provides interpretation and translation services for families and supports districtwide bilingual communication.
- We invested more \$20 million in improving the physical infrastructure of our schools, including new doors, windows, air conditioning, flooring, lighting, secure entrances, etc.
- We implemented Breakfast in the Classroom (BIC) PreK-12, with a participation rate of approximately 75%.
- Based on Panorama survey results, 83% of students reported there are adults in the school they can go to for help, and 52% of students report a sense of belonging at school (this increases to 78% if the category of “somewhat belonging) is included.
- We have expanded partnerships to meet students' needs, including early college partnerships (Holyoke Community College, Westfield State, UMass-Amherst), mental health partnerships (River Valley), and other community-based organizations that offer students academic support

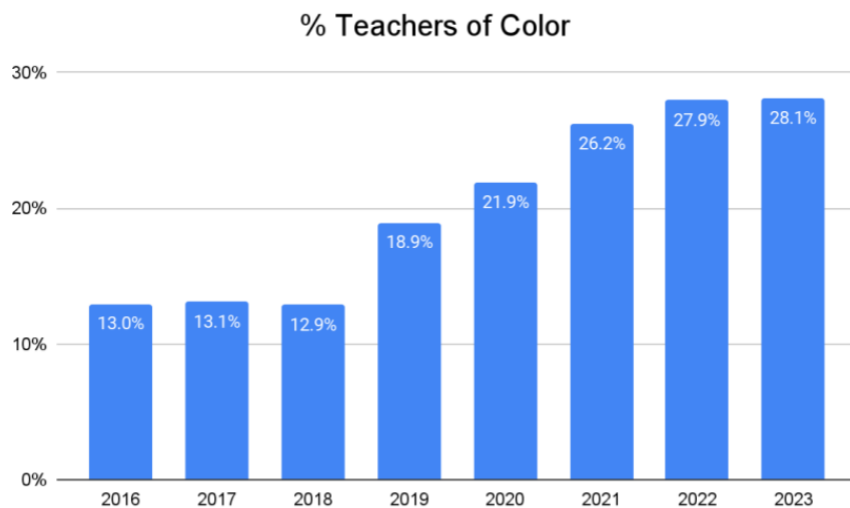
and enrichment opportunities (Boys and Girls Club, YMCA, Homework House, ENLACE, the South Holyoke Safe Neighborhood Initiative, Girls Inc, Play Ball, GEAR UP, Eagle Eye, and more)

- We are continuing to pursue a new middle school to serve 550 students at the Peck site location. The schematic design materials—which includes the building design and cost estimate—were submitted to the Massachusetts School Building Authority (MSBA) in April. The City Council and MSBA will each need to vote in June to approve funding for the new middle school building.
- We are providing more social-emotional learning (SEL) supports through explicit instruction and woven throughout the school day. In a recent visit, 100% of classrooms visited are using at least one SEL strategy effectively, with 69% of SEL strategies being used effectively when given the opportunity. The Trails SEL curriculum is implemented by elementary and middle school classroom teachers.

Educator Development

- We are better recruiting, developing, and retaining teachers of color, with a 15-point increase in the percentage of teachers of color, from 13% in 2015 to 28% in 2022.

More teachers of color are serving our students



10

- We are investing in additional positions to support school leaders and teachers. We have two Executive Directors of School Leadership (EDSL) who develop and support principals in their instructional leadership and school operations. We have also added literacy and math coaching

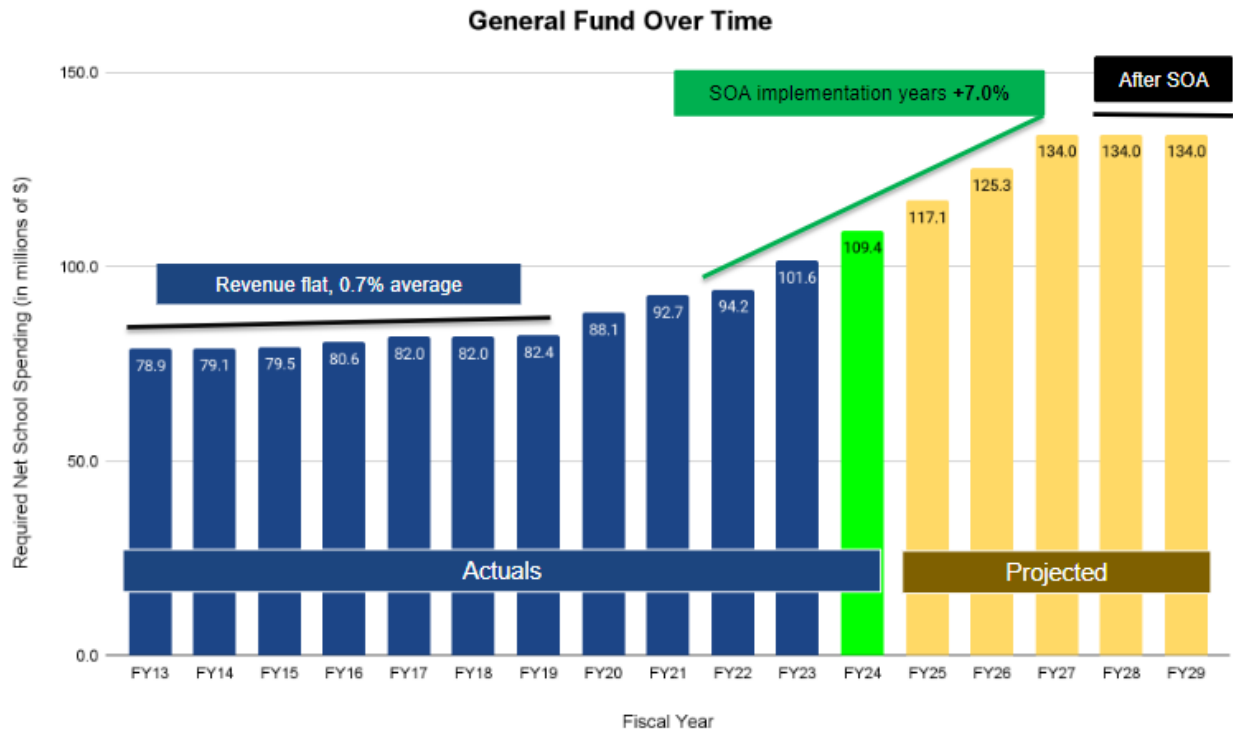
positions at each school, as well as coaches for inclusion. In addition, Advanced Teachers serve as model educators for their peers.

- We are developing and retaining a stable, diverse, and effective principal team, which allows for deeper connections with families and more effective leadership practices. At HPS, 31% of our principals identify as people of color, up from less than 10% in the first year of receivership. There were two principal openings this past year, and both positions were filled by internal candidates who are long-time Holyoke employees. Next year, all schools will be led by current HPS principals—we will have no turnover! And, 71% of teachers and staff believe that their leader communicates a clear vision for their school.
- We are working towards becoming a coherent school system rather than a system of schools. In partnership with Relay and the Barr Foundation, school leaders' professional development has provided a strong foundation for increased alignment. Leaders and educators believe that we are on the path to implementing strong instructional leadership practices, with a focus this year on lesson planning, weekly data meetings, and academic monitoring in response to feedback.

FISCAL YEAR 2023 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 2024 budget. The Student Opportunity Act and Federal COVID-relief funds referred to as ESSER (formally the Elementary and Secondary School Emergency Relief fund) provided significant financial contribution to Holyoke Public Schools and supported our mission. This section explains these funding sources in more detail.

The Student Opportunity Act (SOA) is a state law passed in 2019 to increase funding for schools within communities that have higher populations of students who are economically disadvantaged, students who are English learners, and/or students with disabilities. State and district leaders had known for years that the prior school funding laws did not provide adequate funding for certain. 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 the underlying funding formulas for those categories over seven years and other formulas 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 promising. In FY 2022, required net school spending increased by over \$6.6 million (6.6%). The increase in FY 2023, the second year of SOA, was \$5.2 million (4.9%). The increase for FY 2024 is \$8.7 million (7.7%). SOA should continue to grow the district budget for the next three fiscal years before we can anticipate relatively flat annual increases. The graph below shows the fundamental change that SOA has brought to the district budget. It shows how district revenue was almost flat for seven years, a steady, substantial increase each year during the SOA years, and then a projected leveling off.



SOA has literally bent the curve. Budget forecasting is fraught with risk as forecast 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 slowdown 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. 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.

FISCAL YEAR 2024 BUDGET PROCESS

Holyoke Public Schools' multiyear strategic plan and annual planning drives the budget process. Strategic planning, project planning, and budget planning work together to ensure that the district's priorities are clear and relevant and that resources are appropriately allocated to meet the priorities. By strategically aligning goals with financial and human resources, HPS makes a commitment to meet our vision, mission, and 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 2024 BUDGET CONTEXT AND OVERVIEW

Our work developing the FY 2024 budget builds on the positive trends from FY 2023. Our required net school spending amount set by the state went up by 7.7%, the second year of a significant increase. This is in large part due to the Student Opportunity Act.

Level services to start – To begin the development of our FY 2024 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 2023. (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 department leaders 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 2024, our calculations from level services showed that, as anticipated, we were able to absorb many of the new staffing positions created in FY 2022 and FY 2023 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 saw a shift from a “reductions list” to a “new investment” list – strategies that each leader would invest in if they had more funds available. FY 2024 saw the “new investments” phase of budget development for the third year in a row.

WHAT THIS BUDGET ACCOMPLISHES

We believe that the process we used to develop our FY 2024 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 investments include:

Early Literacy

- Continue to develop teachers' knowledge and expertise in early literacy practices.
- Provide sufficient coaching support and intervention resources to support our youngest learners.

Learning Experiences

- Invest in a new grades 3-5 English and Spanish Language Arts curriculum.
- Continue to expand dual language programming, including into high school.
- 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.

Whole Child

- Provide Art and Music in every school and additional enrichment opportunities that reflect reflects students' and families' interests.
- Continue to invest in social emotional learning and mental health supports.
- Ensure every school is allocated adequate counselors and student support teams to meet students' needs.

Inclusion

- Invest in leadership development training focused on inclusive practices, especially for students with disabilities and students who are English Learners
- Develop staffing models in elementary and middle school with core content, special education, and English Learner teachers collaborating together
- Offer the new middle school schedule to help promote collaboration, inclusion and expanded opportunities for students

Educator Development

- Continue to strengthen teacher practice through the implementation of high quality, differentiated professional development aligned to HPS priorities.
- Invest in an Executive Director of Diversity, Equity, and Inclusion who will lead equity-driven professional development and also support our Family and Community Engagement Team.
- Revamp the Induction Program to provide opportunities for new teachers to grow and develop.

Fiscal Dependency

FY24 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 2024 is \$122.2 million. Holyoke Public Schools is heavily fiscally dependent on the state as shown in the image above. Chapter 70 State aid is \$97.0M (88.6%) of the General Fund Budget. The City is required to contribute \$12.5 million (11.4%) to comprise the remainder of the General Fund Budget.

The FY 2024 general operating budget increased 7.7% when compared to the FY 2023 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 \$7.2 million when compared FY 2023.

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 8.7% over FY 2023, and supplies and service expenditures increased by 6.3%. The majority of the increase in salaries is due to the District's continued investment in teachers through our performance-based compensation model. In addition, staffing was added to support students who are English Learners, students with disabilities, and all students in social emotional and behavioral learning.

Overall expenditures increased by 7.8% when compared to the adopted budget.

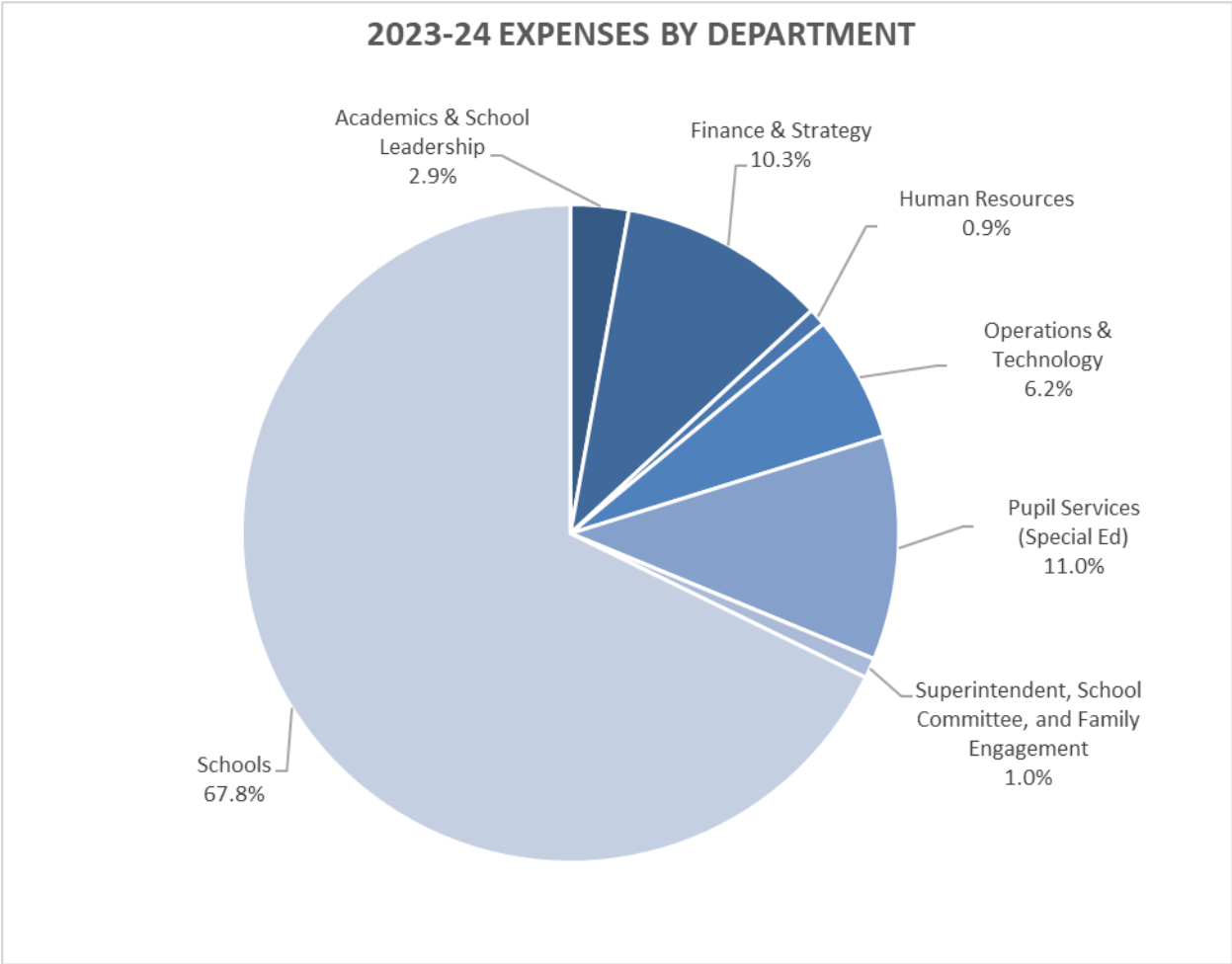
FY24 Projected Expenses



Personnel
Services
\$77.7M
63.5%

Supplies &
Services
\$44.5M
36.5%

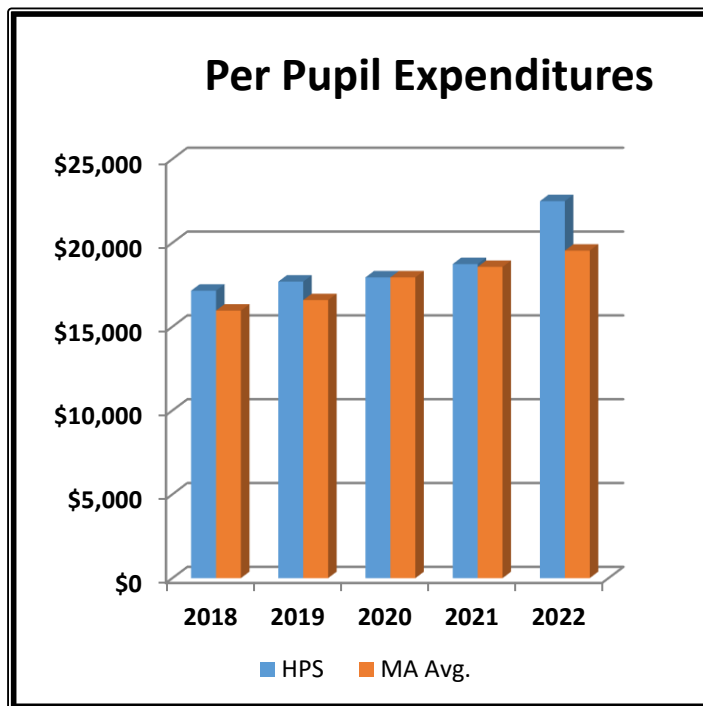
	2023 <u>Adopted</u>	2024 <u>Budget</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	\$71,493,217	\$77,705,249	\$6,212,032	8.7%
Supplies & Services	\$41,911,999	\$44,545,378	\$2,633,379	6.3%
TOTAL:	\$113,405,216	\$122,250,627	\$8,845,411	7.8%



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 67.8% 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 11.0% 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 Finance & Strategy, which captures 10.3% of expenses. The majority of this division is student 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.

Over the past five years, HPS has spent an average of \$19,719 per in-district student, while the state average for that same time is \$18,353. The larger increase in FY 2022 is due to Student Opportunity Act funding.

The District has a high proportion of students with disabilities, students who are English Learners and students who are economically disadvantaged 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.

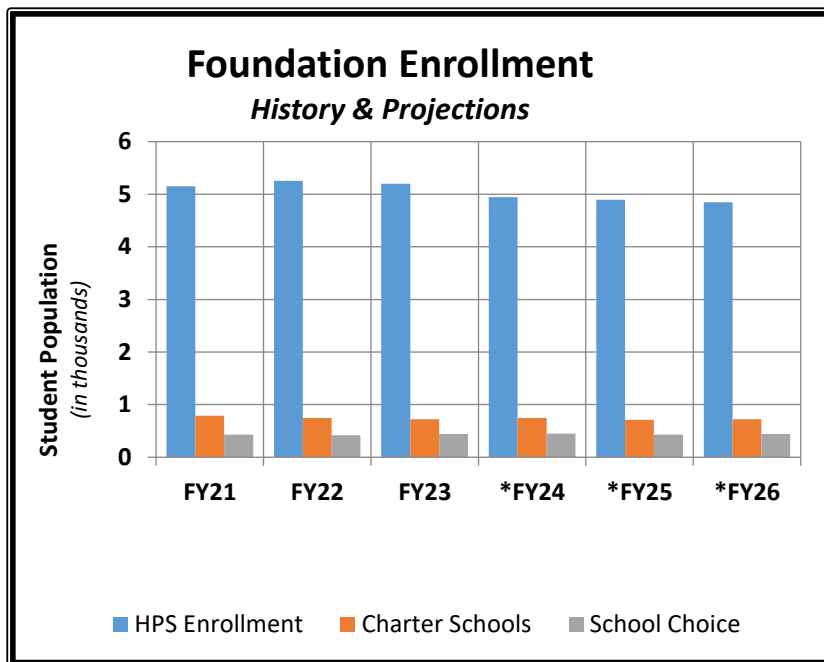
Holyoke Public Schools has a high transient population. This characteristic makes it quite difficult to accurately track and project student enrollment between schools. Although the task can be difficult, estimating student enrollment is a critical function necessary for the District to appropriately 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 1st 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 1st. Those who leave in September or arrive after October 1st are not counted. A student who happens to be absent on October 1st 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. 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	*FY24
Foundation Enrollment	6,478	6,463	6,330	6,330	6,357	6,159	6,033	5,926
Charter Schools	843	824	802	790	749	721	746	713
School Choice	374	390	424	433	421	445	449	417
Estimated In-district Enrollment	5,344	5,366	5,293	5,350	5,153	5,253	4,980	4,943
Foundation Budget Per Pupil	12,401	12,554	13,006	13,676	14,183	15,212	16,843	18,463

ACTUAL ENROLLMENT

Actual enrollment is a headcount of students attending Holyoke Public Schools on October 1st 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 2024, the District's foundation enrollment is 5,926, while actual enrollment in Holyoke Public Schools is estimated to be approximately 4,943. 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.

As enrollment decreases, HPS needs to be especially strategic in how services are delivered and resources are used. We strive to prioritize investment in the classroom, inclusive of high-quality instruction and a safe and welcoming learning environment. The way HPS uses all its resources—including the student opportunity act funding and ESSER funding—is critical to invest now and ensure the 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:

Erin Linville

Chief Financial and Strategy Officer

elinville@hps.holyoke.ma.us

Questions about Policies:

Superintendent's Office	Anthony W. Soto. <i>Superintendent</i>	413.534.2000 ext. 1300
Finance and Strategy	Erin Linville <i>Chief Financial and Strategy Officer</i>	elinville@hps.holyoke.ma.us
Academics and School Leadership	Stephen Mahoney <i>Assistant Superintendent</i>	413.534.2000 ext. 1420
Human Resources	Beth Gage <i>Chief Human Resources Officer</i>	413.534.2000 ext. 1500
Pupil Services	Marianne Currier <i>Chief of Pupil Services</i>	413.534.2000 ext. 1200
Technology and Operations	Christy Prosser <i>Executive Director of Technology & Operations</i>	413.534.2000 ext. 1701
DEI and Family Engagement	Steve Moguel <i>Executive Director of Diversity, Equity and Inclusion (as of 7/1/23)</i>	smoguel@hps.holyoke.ma.us



Organization and Financials

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Introduction to Holyoke Public Schools

Holyoke Public Schools is a PK-12 public school district serving nearly 5,000 students, of whom 80 percent are Latino/Latina, in 14 schools during the 2022-23 school year. We employ nearly 1,300 people who together educate and support a richly diverse community of learners. We've invested in recruiting and retaining top quality educators who inspire bold thinking, recognize student potential, and encourage all students to work towards their goals.

Our Equity Commitments are pledges we are making to address systemic equity challenges.

- We intentionally build a community that is **anti-racist, inclusive, and culturally responsive**.
- 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 create a culture of acceptance and empathy so that **everyone feels valued and is able to contribute** to our community's success.

HPS was placed into receivership by the State of Massachusetts in Spring 2015 because of struggling performance. We have since implemented a [Turnaround Plan](#) that has led to expanded opportunities for students to explore the arts, sports, sciences, local and world cultures, early college and work-based learning. Since 2015, HPS has experienced numerous accomplishments, including:

- A 14-point increase in the district's graduation rate;
- Doubling access to PreK programming;
- An 85 percent increase in access to early college programming; and
- A 15-point increase (to 28%) in teachers of color

About Holyoke

[The City of Holyoke](#), with a population of about 38,000 residents, is in Hampden County within the Pioneer Valley region of western Massachusetts. Holyoke is a densely populated city of approximately 23 square miles bordered by West Springfield on the south; Westfield, Southampton, 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.

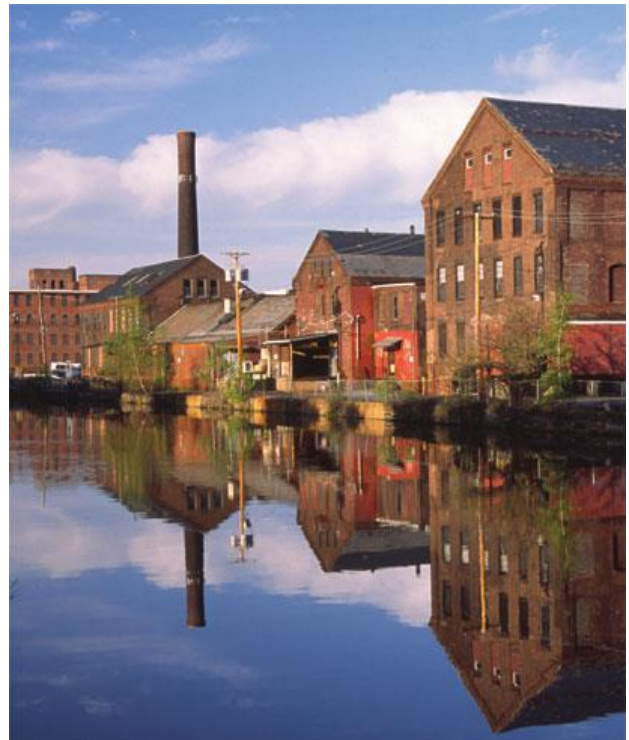
Holyoke is at the center of New England's Knowledge Corridor, which extends from the Vermont border to just below Hartford. There are [15 colleges and universities within 25 miles of Holyoke](#) that provide a wide range of educational opportunities. They also help provide skilled graduates to meet the hiring

needs of local employers, as does [Holyoke High School's Dean Campus](#), which partners with area businesses to train and supply skilled workers through customized technical training programs. Local organizations work together through [the Cooperating Colleges of Greater Springfield](#), an educational consortium of the eight public and private colleges in the Greater Springfield area. The organization was founded in 1971 to foster sharing of programs, talents, facilities, and educational resources while retaining the initiative and vitality of independent institutions. 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.

Holyoke's History

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.

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 three-level canal systems with 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 1900s, 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 conversions 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 other natural assets. Today more than 60 percent of the energy used in the city still comes from hydropower, now a state-of-the-art dam system on the river.

Because of the growth of industry, Holyoke's population grew by more than 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. Immigrants continued to move into the city, including significant populations of French Canadian, Polish, German, and most recently a wave of migrant population from Puerto Rico since the 1970s. In 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. Holyoke has the unique asset of the highest percentage of Puerto Rican population in any city outside of Puerto Rico itself.



Aerial View of Holyoke, MA

Photo by J. Guy Gaulin

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: [Veto](#)s

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 FY24 Budget

	Final State Budget	Governor's Budget	Level Service	Final Proposed FY24	\$ change	% change
	FY2023	FY2024	FY2024	FY2024	Change	
REVENUES						
Chapter 70 State Aid	89,770,485	96,959,371	96,959,371	96,959,371	7,188,886	8.0%
Holyoke Required Local Contribution	11,842,864	12,452,771	12,452,771	12,452,771	609,907	5.1%
Required Net School Spending	101,613,349	109,412,142	109,412,142	109,412,142	7,798,793	7.7%
City Admin NSS (Admin and Parks)	(148,000)	(148,000)	(148,000)	(148,000)	0	0.0%
Charter Tuition reimbursement	2,745,997	2,836,261	2,836,261	2,451,433	(294,564)	-10.7%
Adjusted Net School Spending	104,211,346	112,100,403	112,100,403	111,715,575	7,504,229	7.2%
Transportation - other than Charter	8,862,267	10,191,607	10,026,337	9,591,033	728,766	8.2%
Charter Tuition Transportation (Assessment)		465,117	465,117	465,117	465,117	
Crossing guards	137,700	141,831	141,831	141,831	4,131	3.0%
Medicaid	100,000	100,000	100,000	100,000	0	0.0%
Leases	237,071	250,585	250,585	237,071	0	0.0%
Non-NSS Revenue	9,337,038	11,149,140	10,983,870	10,535,052	1,198,014	12.8%
Total General Fund Budget	113,548,384	123,249,543	123,084,273	122,250,627	8,702,243	7.7%
SUPPLEMENTAL REVENUE						
TOTAL OPERATING REVENUE	113,548,384	123,249,543	123,084,273	122,250,627	8,702,243	7.7%
EXPENSES						
Salaries	56,890,044	61,248,950	61,814,680	62,606,030	5,715,986	10.0%
Supplies & Services	9,158,750	9,860,492	9,040,261	9,575,189	416,439	4.5%
Total Discretionary Expenses	66,048,794	71,109,442	70,854,941	72,181,219	6,132,425	9.3%
<i>Health & Life Insurance</i>	<i>8,008,164</i>	<i>8,219,609</i>	<i>8,219,609</i>	<i>8,008,164</i>	<i>(240,245)</i>	<i>-3.0%</i>
<i>Retirement non teachers</i>	<i>2,270,407</i>	<i>2,401,482</i>	<i>2,401,482</i>	<i>2,401,482</i>	<i>131,075</i>	<i>5.8%</i>
Retired Teachers Health assessment	3,806,731	3,968,571	3,968,571	3,968,571	161,840	4.3%
Charter Tuition/School Choice/SPED assess.	15,388,070	16,675,653	16,675,653	15,802,815	414,745	2.7%
Other Benefits	511,000	526,330	521,000	521,000	10,000	2.0%
Unemployment	300,000	300,000	300,000	200,000	(100,000)	-33.3%
Utilities	2,613,418	2,874,760	2,607,767	2,607,767	(5,651)	-0.2%
Out of District Tuition	4,899,645	6,124,556	6,124,556	6,124,556	1,224,911	25.0%
Total Non-Discretionary Expenses*	37,797,435	41,090,961	40,818,638	39,634,355	1,596,675	4.2%
Transportation - other than Charter	8,862,267	10,191,607	10,026,337	9,591,033	728,766	8.2%
Charter Tuition Transportation (Assessment)	465,117	465,117	465,117	465,117	0	0.0%
Crossing guards	137,700	141,831	141,831	141,831	4,131	3.0%
Leases	237,071	250,585	250,585	237,071	0	0.0%
Total Non-NSS Expenses	9,702,155	11,049,140	10,883,870	10,435,052	732,897	7.6%
Sub-Total Operating Budget Expenses	113,548,384	123,249,543	122,557,449	122,250,627	8,461,998	7.5%
TOTAL EXPENSES PROJECTED	113,548,384	123,249,543	122,557,449	122,250,627	8,461,998	7.5%

Operating Budget Calendar

DECEMBER 2022

- 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 2023

- Memo of FY 2024 budget instructions and budget reductions are sent out to all Chiefs and Principals.
- First meeting with cabinet is held to initiate the FY 2024 budget request.
- The Governor's FY 2024 (House I) proposed budget is announced and analyzed
- Bi-monthly meetings are held with school principals to review current year budget.

FEBRUARY 2023

- FY 2024 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 2023

- 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 2023

- 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.

MAY 2023

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

JUNE 2023

- 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 2023

- Send communication to all departments regarding their approved FY 2023 budget.
- Debriefing on the FY 2024 budget to be held.
- Meetings are held with school principals, school supervisors and Chiefs to review current year budget.

AUGUST 2023

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

SEPTEMBER 2023

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

OCTOBER 2023

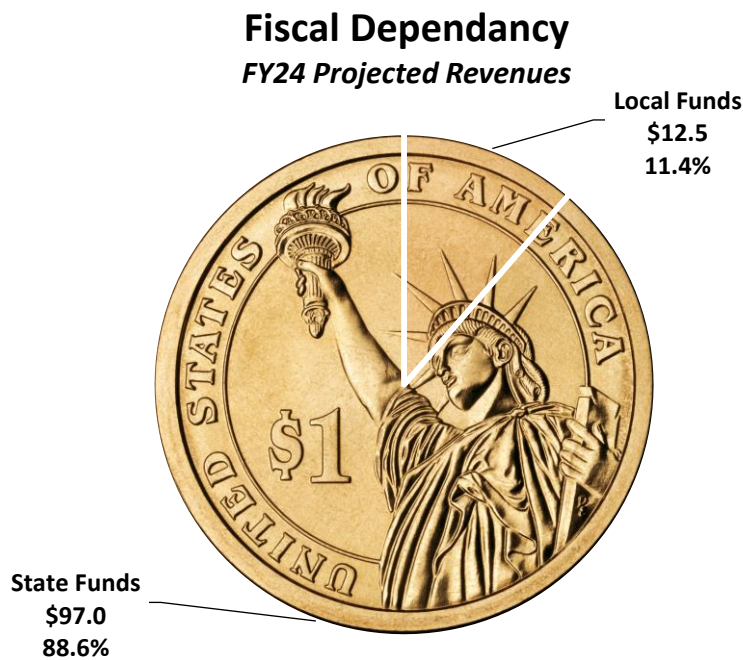
- October 1st student enrollment numbers posted by the Department of Elementary and Secondary Education.
- Preliminary FY 2025 school-based staffing allocation adjustments made.
- Regular meetings are held with Chiefs and department heads to review current year budget.

NOVEMBER 2023

- Preliminary FY 2025 budget projection completed.
- The Budget Team begins developing plans and communications for FY 2025 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 (88.6%), 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 12th 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 FY24, the local contribution is \$12.5 million. The State then funds the remaining amount with Chapter 70 Aid, which for FY24 is \$97.0 million. Below is a list of cities with the lowest local contribution in the state in FY24.

Cities with the Lowest Local Contribution in the State of MA					
District	Enrollment	Required Net School Spending	Local Contribution	State Aid	% Local Contribution
Lawrence	14,566	\$279,873,222	\$13,728,391	\$266,144,831	4.9%
Springfield	28,326	\$525,763,853	\$48,026,085	\$477,737,768	9.1%
Holyoke	5,926	\$109,412,142	\$12,452,771	\$96,959,371	11.4%
New Bedford	14,148	\$259,908,138	\$35,809,016	\$224,099,122	13.8%
Athol Royalston	1,746	\$27,758,996	\$4,374,330	\$23,384,666	15.8%
Chelsea	7,110	\$138,863,180	\$22,081,668	\$116,781,512	15.9%
Fall River	12,238	\$226,544,926	\$38,520,449	\$188,024,477	17.0%
Greater Lawrence	1,695	\$43,068,009	\$7,518,634	\$35,549,375	17.5%
Lynn	17,895	\$329,943,497	\$60,851,330	\$269,092,167	18.4%
Brockton	16,619	\$295,646,848	\$54,579,267	\$241,067,581	18.5%

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

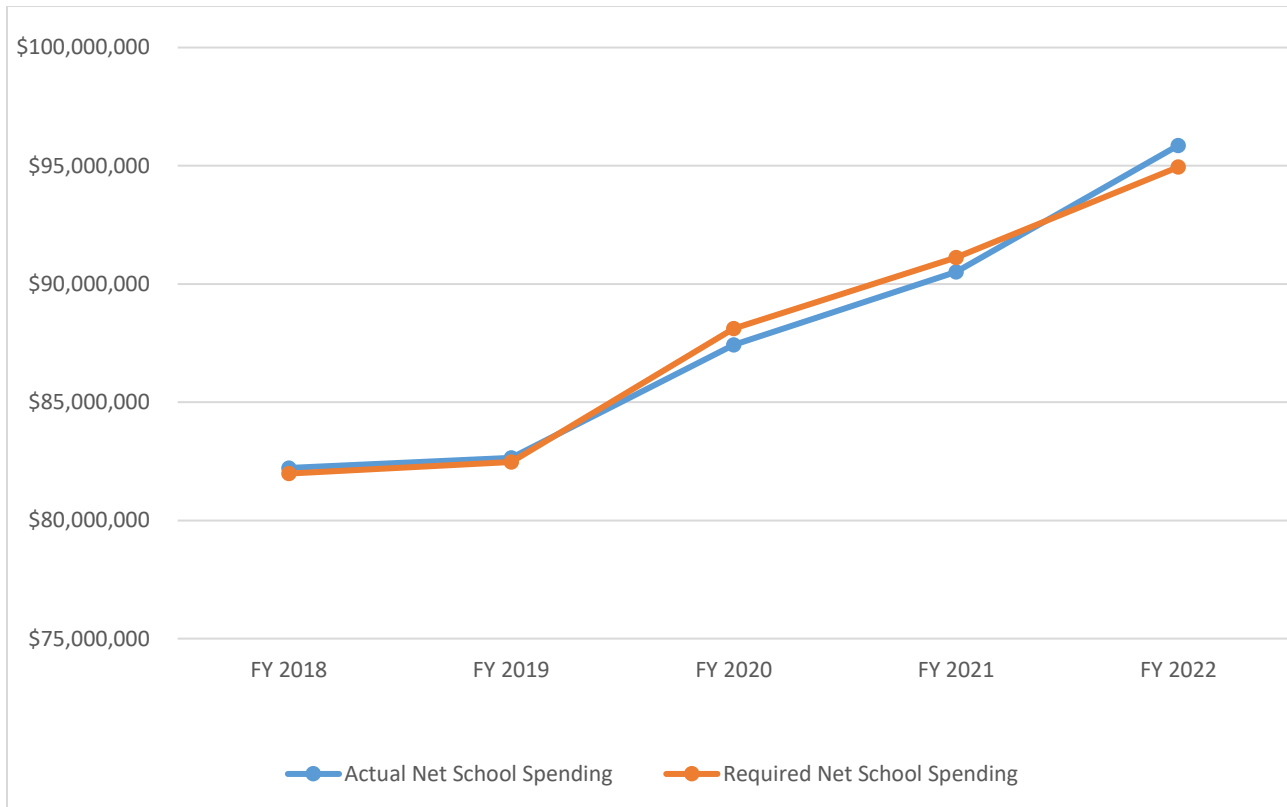
Also included in Chapter 70 is the calculation for meeting “net school spending,” or the minimum amount that a municipality and school district must spend on education during the fiscal year. Required net school spending is the sum of Chapter 70 aid and the required local contribution as determined by the Department of Elementary and Secondary Education (DESE). Below is the preliminary net school spending (NSS) requirement for FY 2024 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>FY24</u>	<u>FY2023</u>	<u>FY2022</u>	<u>FY2021</u>	<u>FY2020</u>
Enrollment	5926	6033	6159	6357	6330
Required District Contribution	\$ 12,452,771	\$ 11,842,864	\$ 11,380,266	\$ 11,207,668	\$ 11,074,770
Chapter 70 Aid	\$ 96,959,371	\$ 89,770,485	\$ 82,852,757	\$ 78,953,361	\$ 75,731,000
Required Net School Spending	\$ 109,412,142	\$ 101,613,349	\$ 94,233,023	\$ 90,161,029	\$ 86,805,770

Holyoke Public Schools - Actual Net School Spending

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, and the fact that charter assessments change throughout the year, this has allowed the schools to spend above the net school-spending amount in some years. The City always initially budgets at the minimum net school spending requirement but changes in the cherry sheet assessments affect whether it is met or not. In FY20 and FY21, our initial appropriation was at the NSS requirement but changes in the Cherry Sheet assessments put us below the minimum requirement. The FY24 appropriation is at the minimum amount required. Below is a trend of the Holyoke Public Schools net school spending requirement and actual net school spending based on information obtained on the DESE website:

	<u>FY 2018</u>	<u>FY 2019</u>	<u>FY 2020</u>	<u>FY 2021</u>	<u>FY 2022</u>
Actual Net School Spending	\$ 82,218,823	\$ 82,651,354	\$ 87,425,054	\$ 90,515,999	\$ 95,862,085
Required Net School Spending	\$ 81,981,181	\$ 82,476,862	\$ 88,111,146	\$ 91,113,919	\$ 94,945,262
Amount Over / (Under) NSS	\$237,642	\$174,492	(\$686,092)	(\$597,920)	\$916,823



BUDGETARY APPROPRIATION

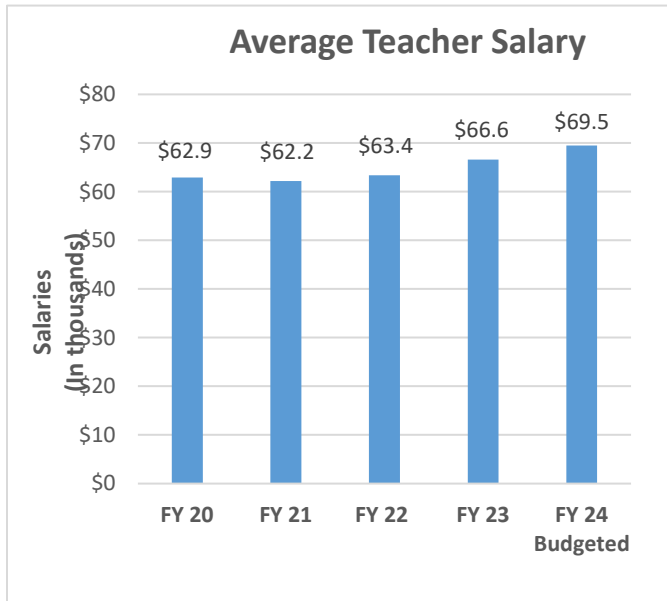
Holyoke Public Schools' general fund budget appropriation is based on the formula shown below. The process begins by taking the Department of Elementary and Secondary Educations (DESE) net school spending (NSS) requirement and reducing it by "Schedule 19," a DESE allowable charge for indirect costs of 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.

	Final State Budget FY2023	Final Proposed FY2024	\$ change	% change
Required Net School Spending	101,613,349	109,412,142	7,798,793	7.7%
Subtract Payment for City Admin.	(148,000)	(148,000)	0	0.0%
Add Charter Reimbursement	2,745,997	2,451,433	(294,564)	-10.7%
Adjusted NSS Subtotal	104,211,346	111,715,575	7,504,229	7.2%
Transportation (Local)	8,862,267	9,591,033	728,766	8.2%
Charter Transportation Assessment (state)		465,117	465,117	100.0%
Crossing Guards	137,700	141,831	4,131	3.0%
Medicaid processing	100,000	100,000	0	0.0%
Leases	237,071	237,071	0	0.0%
Total School Appropriation	113,548,384	122,250,627	8,702,243	7.7%
Supplemental Funding				
Total Operating Budget	113,548,384	122,250,627	8,702,243	7.7%
Below Expenses are NSS Eligible in Other City Budgets				
Insurance / Benefits	8,008,164	8,008,164	0	0.0%
Retirement	2,270,407	2,401,482	131,075	5.8%
Total Expenses in Other City Budgets	10,278,571	10,409,646	131,075	1.3%
Net School Budget Appropriation	103,269,813	111,840,981	8,571,168	8.3%

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. When adjusted, the overall school department appropriation was increased by \$8.6 million to \$111.8 million.

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



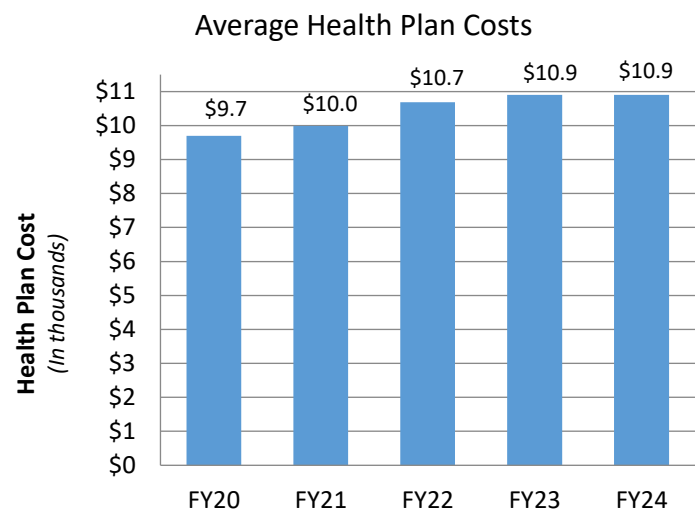
Often spoken about as major forces driving the District's budget increase each year are the areas of employee compensation, employee benefits (such as health insurance, retirement, accrued sick and vacation time, and retiree health benefits), charter tuition / school choice, and special education out-of-district 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 2024, we will continue our investment of a performance-based compensation system that rewards our most talented educators.

EMPLOYEE HEALTH INSURANCE

As shown on the graph, the average health insurance plan cost is \$10,900 per employee. Holyoke Public Schools covers up to 73% of the total cost of all full-time employee healthcare premiums. For the first time in recent history, the City was able to lower the premium amount paid by the employee. FY 2024, \$8.0 million has been budgeted in the general fund to contribute towards health care costs for current employee.

RETIREE AND UNEMPLOYMENT COSTS

For FY 2024, there is expected to be an increase in retirement costs of \$131,075. Pension costs will climb as people live longer, healthier lives but the majority of the school department employees are in the Mass Teachers Retirement System. According to the [U.S. Census Bureau](#), the average life expectancy in 2015 was 79.4 years, which is up by almost 10 years from 69.7 years in 1960. On average, Holyoke Public Schools' pays over \$330,000



per month for retiree health insurance premiums, which equates to \$4 million per year. Unemployment costs are projected to decrease by \$100,000.

OUT OF DISTRICT TUITION

Thirty percent of enrolled HPS students are students with disabilities ([DESE profile](#)). Some students' needs are so significant that the District cannot meet their learning needs within our schools. When that is the case, the student will receive educational services through out of District placement.

Unfortunately, the funding that we receive from the state for these students is not adequate to cover the costs. In FY 2024, the District estimates spending \$12.2 million in out of district costs. The state has directly provided funding for \$4.9 million through Chapter 70 and Circuit Breaker revenue; the remaining \$7.3 million must be paid for through the district's other funding. The trend analysis below shows that the funding required by the district has more than doubled over the past six years.

	OOD LEGACY COSTS					
	FY17	FY20	FY21	FY22	FY23	FY24
Out of District Tuition	\$ 6,100,000	\$ 8,200,000	\$ 8,700,000	\$ 8,900,000	\$ 9,500,000	\$ 12,200,000
Ch 70 Revenue	\$ (1,584,196)	\$ (1,738,013)	\$ (1,831,112)	\$ (1,793,984)	\$ (1,886,004)	\$ (1,810,616)
Circuit Breaker Revenue	\$ (1,263,608)	\$ (2,063,000)	\$ (2,063,000)	\$ (2,365,374)	\$ (2,774,563)	\$ (3,104,750)
TOTAL NET OOD Unfunded	\$ 3,252,196	\$ 4,398,987	\$ 4,805,888	\$ 4,740,642	\$ 4,839,433	\$ 7,284,634

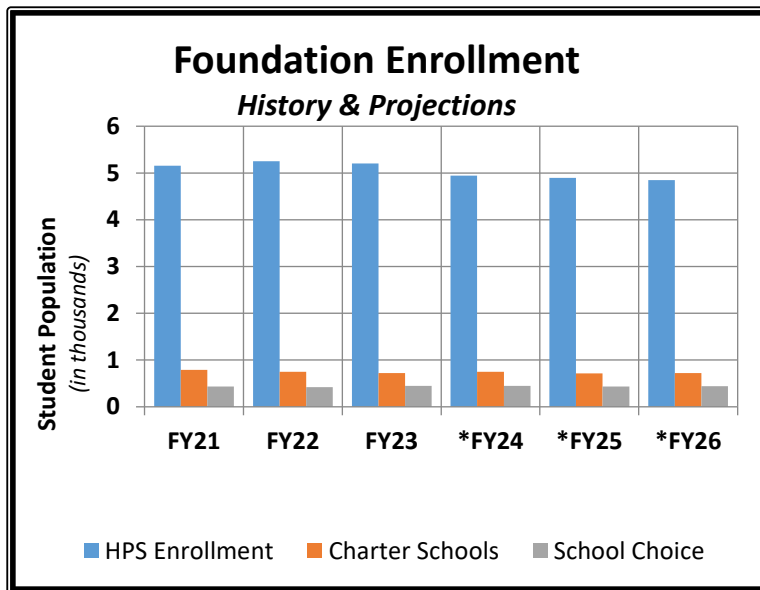
CHARTER SCHOOL TUITION / SCHOOL CHOICE

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 1st 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 1st. Those who leave in September or arrive after October 1st are not counted. A student who happens to be absent on October 1st 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. 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	*FY24
Foundation Enrollment	6,478	6,463	6,330	6,330	6,357	6,159	6,033	5,926
Charter Schools	843	824	802	790	749	721	746	713
School Choice	374	390	424	433	421	445	449	417
Estimated In-district Enrollment	5,344	5,366	5,293	5,350	5,153	5,253	5,200	4,943
Foundation Budget Per Pupil	12,401	12,554	13,006	13,676	14,183	15,212	16,843	18,463

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 2024, the District's foundation enrollment is 5,926, while actual enrollment in Holyoke Public Schools is estimated at 4,943. 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	2
HAMPDEN CS OF SCIENCE EAST	4
HAMPDEN CS OF SCIENCE WEST	69
HILLTOWN COOPERATIVE	2
HOLYOKE COMMUNITY	474
LIBERTAS ACADEMY	3
PAULO FREIRE SOCIAL JUSTICE	76
PHOENIX ACADEMY SPRINGFIELD	7
PIONEER VALLEY CHINESE IMMERSION	31
PIONEER VALLEY PERFORMING ARTS	33
SPRINGFIELD INTERNATIONAL	5
SPRINGFIELD PREPARATORY	5
VERITAS PREPARATORY	2
TOTAL	713

Choice Out by School

Receiving District

Agawam High	3
Amherst Regional High	4
Anne T. Dunphy School	1
Barry	1
Bridge Street	5
Chestnut Hill Community School	1
Chicopee Comprehensive High School	4
Cold Spring	1
Crocker Farm Elementary	3
Deerfield Elementary	1
East Meadow	8
Easthampton High	19
Fairview Elementary	1
Fort River Elementary	3
Franklin Ave	3
Frontier Regional	2
Gateway Regional Middle School	1
Gen John J Stefanik	1
German Gerena Community School	1
Granby Jr Sr High School	7
Greater Commonwealth Virtual School	22
Greenfield Middle	1
Hadley Elementary	7

Hampshire Regional High	54
Hatfield Elementary	18
Highland	2
Hopkins Academy	10
Jackson Street	1
John F Kennedy Middle School	8
Knox Trail Middle School	1
Lee Elementary	1
Leeds	1
Memorial	1
Michael E. Smith Middle School	8
Minnechaug Regional High	1
Mittineague	1
Mosier	1
Mountain View School	42
New Hingham Regional Elementary	1
Northampton High	21
Paper Mill	1
Pelham Elementary	2
Plains Elementary	1
R. K. Finn Ryan Road	8
Ralph C Mahar Regional	1
Robinson Park	1
Smith Academy	15
South Hadley High	28
Southampton Road	3
Southwick Regional School	1
Springfield Central High	1
Springfield High School	1
Swift River Elementary	2
TEC Connections Academy Commonwealth Virtual School	30
Van Sickle Academy	1
West Springfield Middle	1
Westfield High	5
Westfield Intermediate School	4
Westfield Middle School	7
Westhampton Elementary School	2
Wildwood Elementary	2
William E Norris	25
Woodland School	3
TOTAL	417

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 24</u> <u>Budget</u>
Tuition (Charter, Choice, OOD)	\$0.18	\$ 21,927,372
Salaries & Benefits	\$0.64	\$ 77,705,247
Supplies and Services	\$0.08	\$ 9,575,189
Transportation and Other	\$0.09	\$ 10,435,052
Utilities	\$0.02	\$ 2,607,767
TOTAL	\$1.00	\$122,250,627

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



HOLYOKE PUBLIC SCHOOLS
JUNTOS PODEMOS | TOGETHER WE CAN

Office of the Superintendent

**Superintendent
Anthony Soto**

Executive
Assistant to the
Superintendent

TBD

**Chief Human
Resource Officer**

Beth Gage

**Chief Pupil
Service Officer**

Marianne Currier

**Chief Financial &
Strategy Officer**

Erin Linville

**Assistant
Superintendent**

Stephen Mahoney

**Executive Director of
Technology &
Operations**

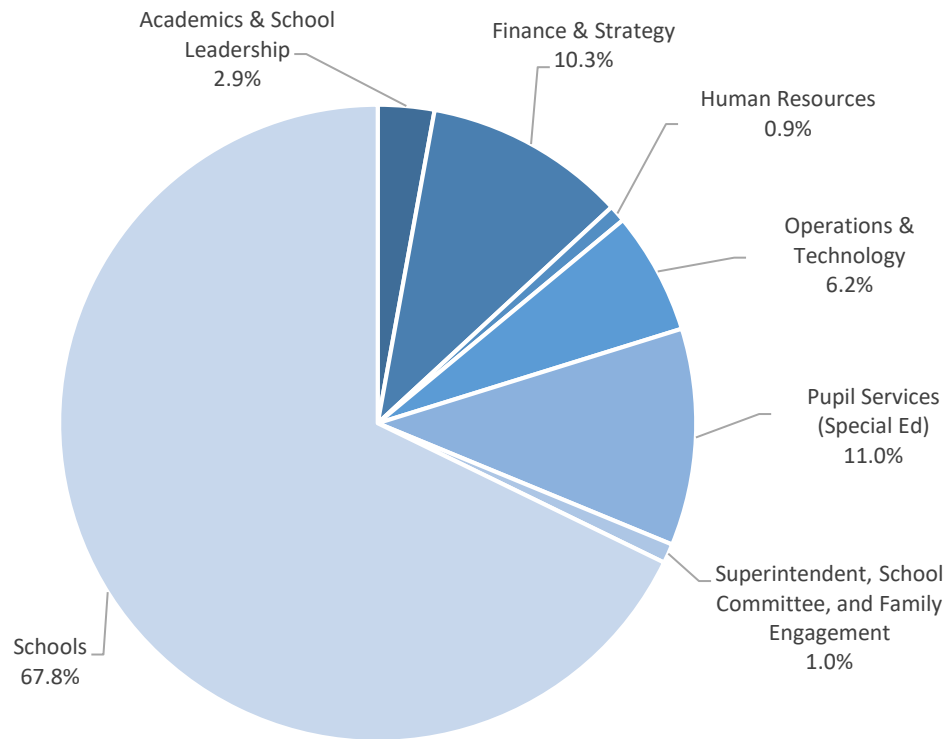
Christy Posser

**Executive
Director of DEI &
Engagement**

Steve Moquel

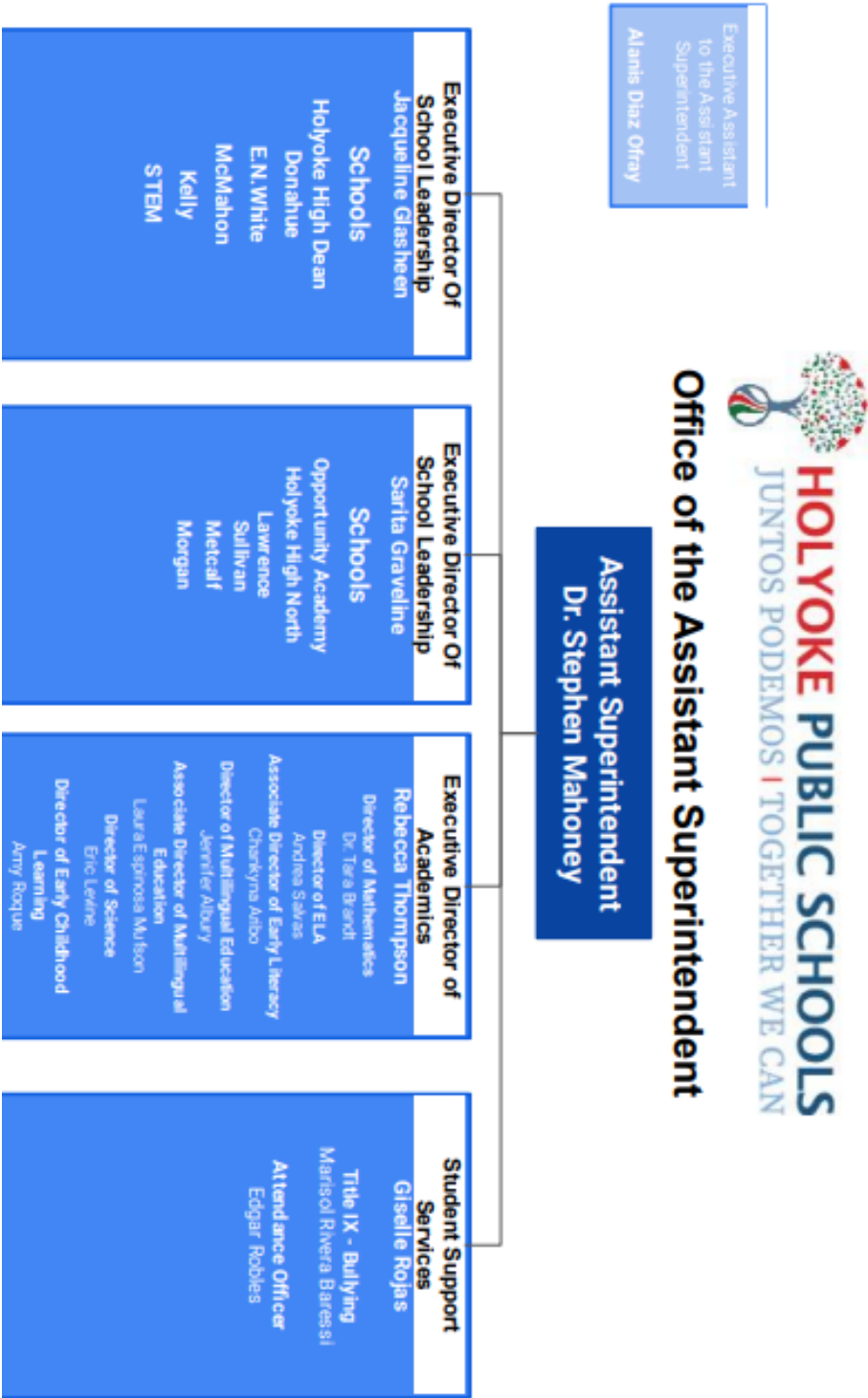
General Fund – Divisional Budget

2023-24 EXPENSES BY DEPARTMENT



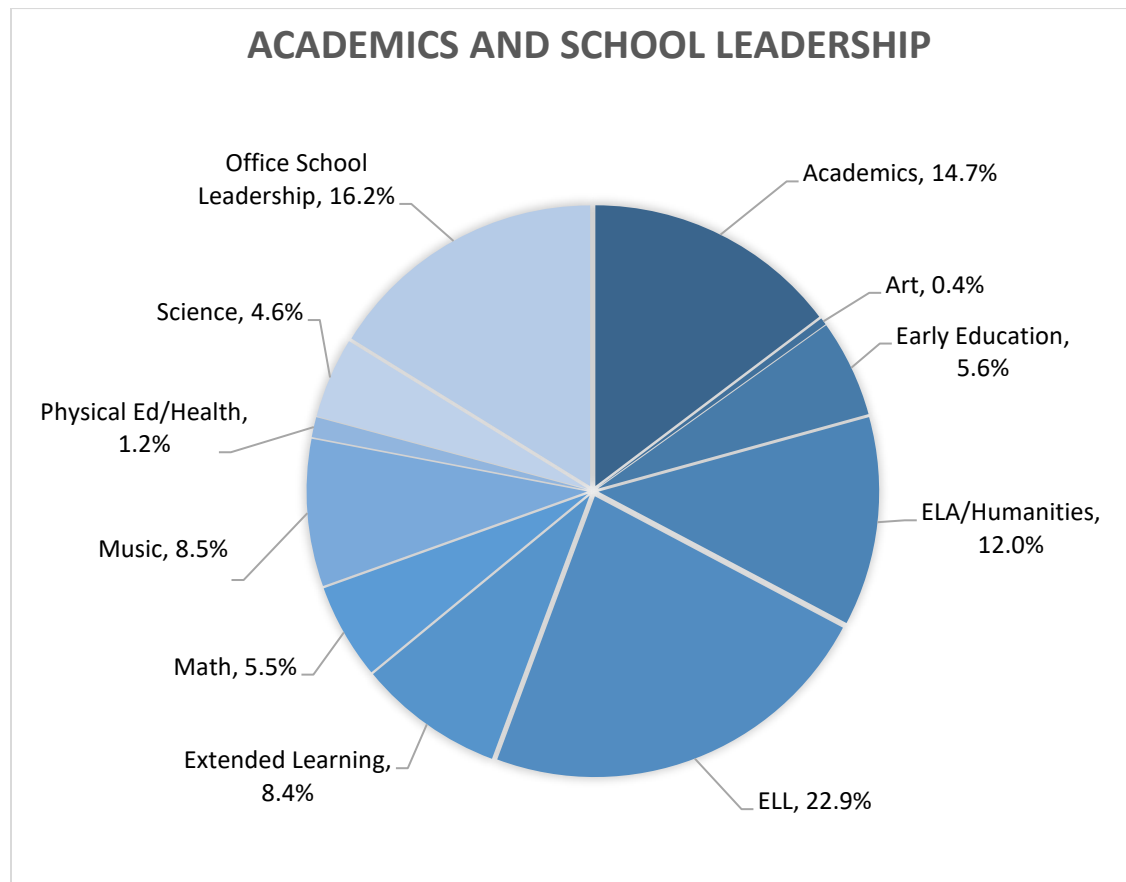
	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Academics & School Leadership	2,985,767	3,202,259	216,492	7.3%
Finance & Strategy	10,604,256	11,478,060	873,804	8.2%
Human Resources	874,486	965,466	90,980	10.4%
Operations & Technology	7,239,991	6,949,974	(290,017)	(4.0%)
Pupil Services (Special Ed)	10,597,656	12,321,598	1,723,942	16.3%
Superintendent, School Committee, and Family Engagement	1,029,453	1,104,497	75,044	7.3%
Schools	69,795,036	75,819,126	6,024,090	8.6%
Total General Fund	103,126,645	111,840,980	6,349,375	6.6%

Academics and School Leadership



MISSION

The Academics and School Leadership department sets and drives the PreK-12+ strategy for curriculum, instruction, assessment and school leadership as a school system. The Academics and School Leadership Office's mission is to ensure that curriculum, instructional practices, leader and teacher development are coordinated and aligned with the HPS Strategic Plan. The department is also responsible for overseeing Student Support Services to ensure that students and families have access to the resources and supports necessary to be successful and thrive in their educational experience. They work closely with the Pupil Services team to promote inclusive practices within our schools.



	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Academics	406,525	470,609	64,084	15.8%
Art	13,248	13,248	-	0.0%
Early Education	665,913	179,676	(486,237)	(73.0%)
ELA/Humanities	216,847	385,302	168,455	77.7%
ELL	425,601	733,432	307,831	72.3%
Extended Learning	239,160	268,176	29,016	12.1%
Math	141,364	176,162	34,798	24.6%
Music	272,754	271,467	(1,287)	(0.5%)
Physical Ed/Health	41,855	37,067	(4,788)	(11.4%)
Science	193,000	148,851	(44,149)	(22.9%)
Office School Leadership	369,500	518,269	148,769	40.3%
Total	2,985,767	3,202,259	216,492	7.3%

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	1,226,678	1,692,833	466,155	38.0%
Supplies & Services	1,758,059	1,509,426	(248,633)	(14.1%)
Total	2,984,737	3,202,259	217,522	7.3%

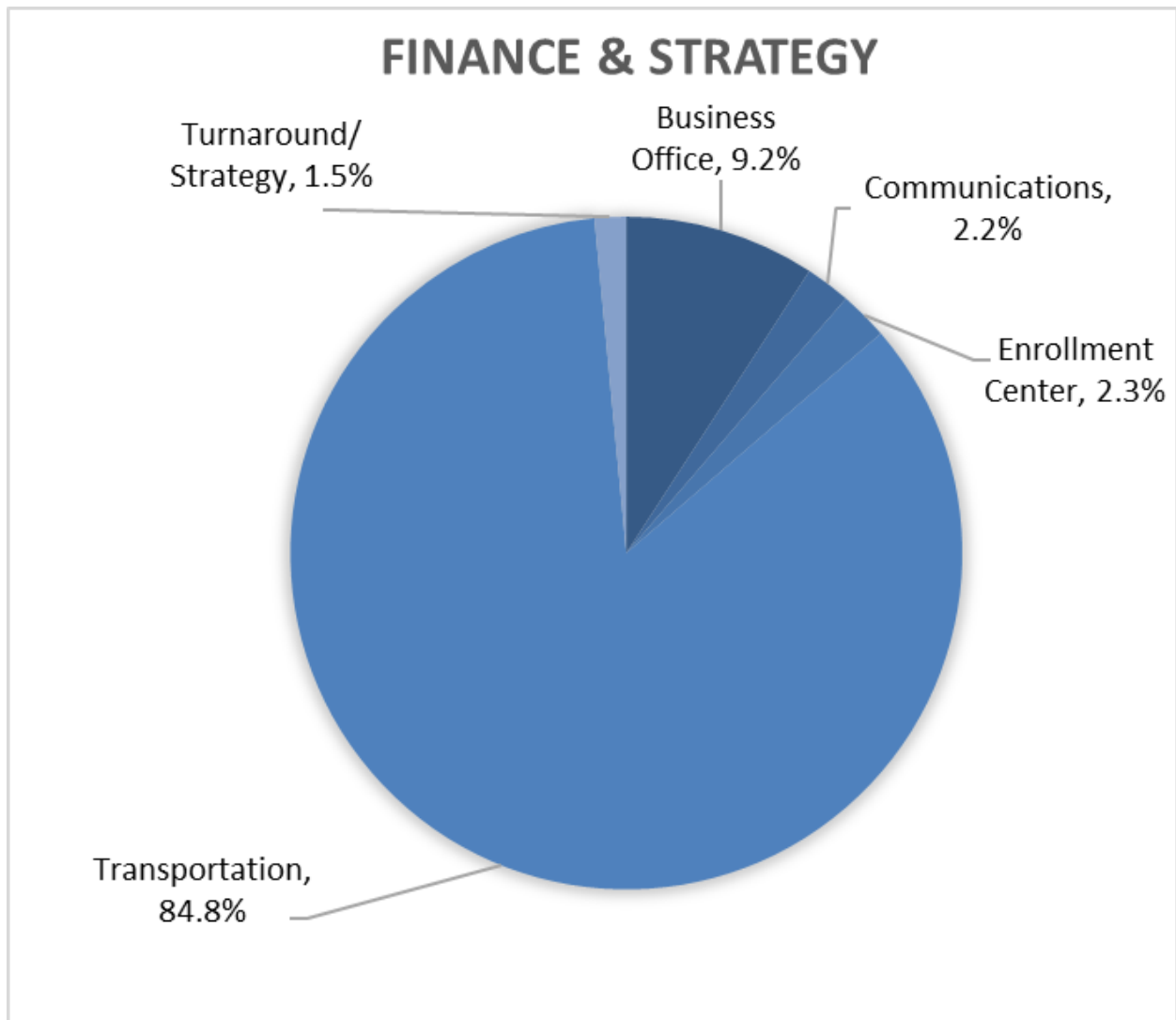
	<u>2023</u>	<u>2024</u>	<u>Change</u>	
FTE totals				-
Funded on General Fund	14.00	15.00	1.00	
Funded on Special Revenue	11.00	10.00	(1.00)	
Total	25.00	25.00	0.00	

Finance and Strategy



MISSION

In FY 2024, the Finance and Strategy departments are merged under one cabinet leader in order to more completely integrate strategy and finance in HPS. The department is responsible for ensuring effective, reflective, and urgent implementation of the district turnaround plan and overseeing a \$122 million budget. It includes the function of Capital Planning, Communications, Finance, Grants Management, Homeless Services, Strategy, and Transportation. It also includes oversight of high-priority initiatives and maintains fiscal compliance with federal, state, and local laws. The finance team works in collaboration with principals and cabinet leaders to develop school and department budgets.



	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Business Office	1,016,083	1,052,844	36,761	3.6%
Communications	170,746	249,070	78,324	45.9%
Enrollment Center	253,072	268,840	15,768	6.2%
Transportation	8,999,967	9,732,864	732,897	8.1%
Turnaround/ Strategy	164,388	174,442	10,054	6.1%
Total	10,604,256	11,478,060	873,804	8.2%

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	1,034,730	1,056,045	21,315	2.1%
Supplies & Services	9,569,526	10,422,015	852,489	8.9%
Total	10,604,256	11,478,060	873,804	8.2%

FTE totals	<u>2023</u>	<u>2024</u>	<u>Change</u>
Funded on General Fund	16.00	16.00	0.00
Funded on Special Revenue	8.50	7.00	(1.50)
Total	24.50	23.00	(1.50)



Office of Technology & Operations

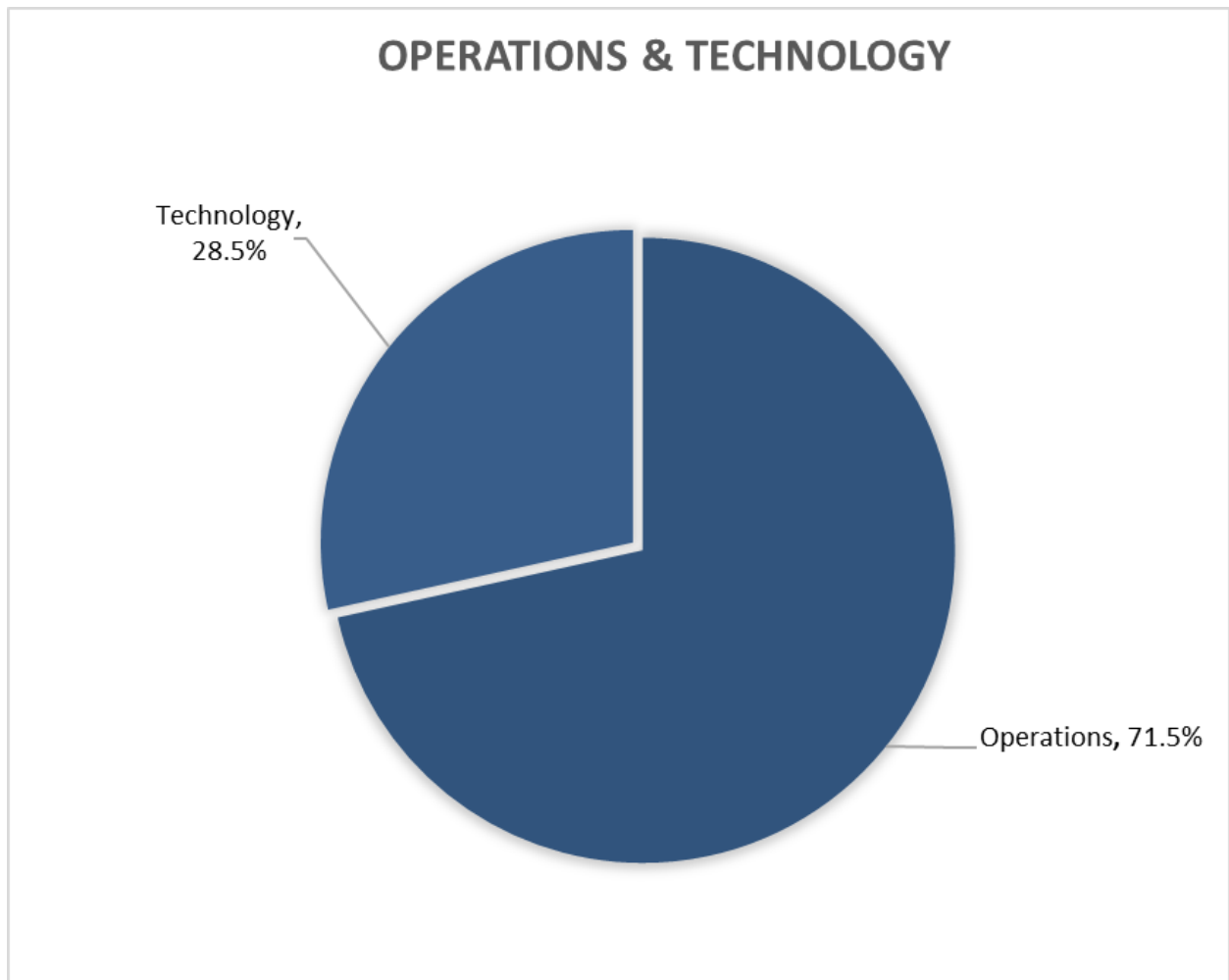
**Executive Director of
Technology & Operations**
Christy Posser



Operations and Technology

MISSION

The Operations and Technology Departments promote the operational health of the district, including overseeing facilities, custodial services, maintenance, security, food service, technology, and data information systems functions. The department's mission is to provide a safe, comfortable, and nurturing learning environment that will allow our students and staff to flourish.

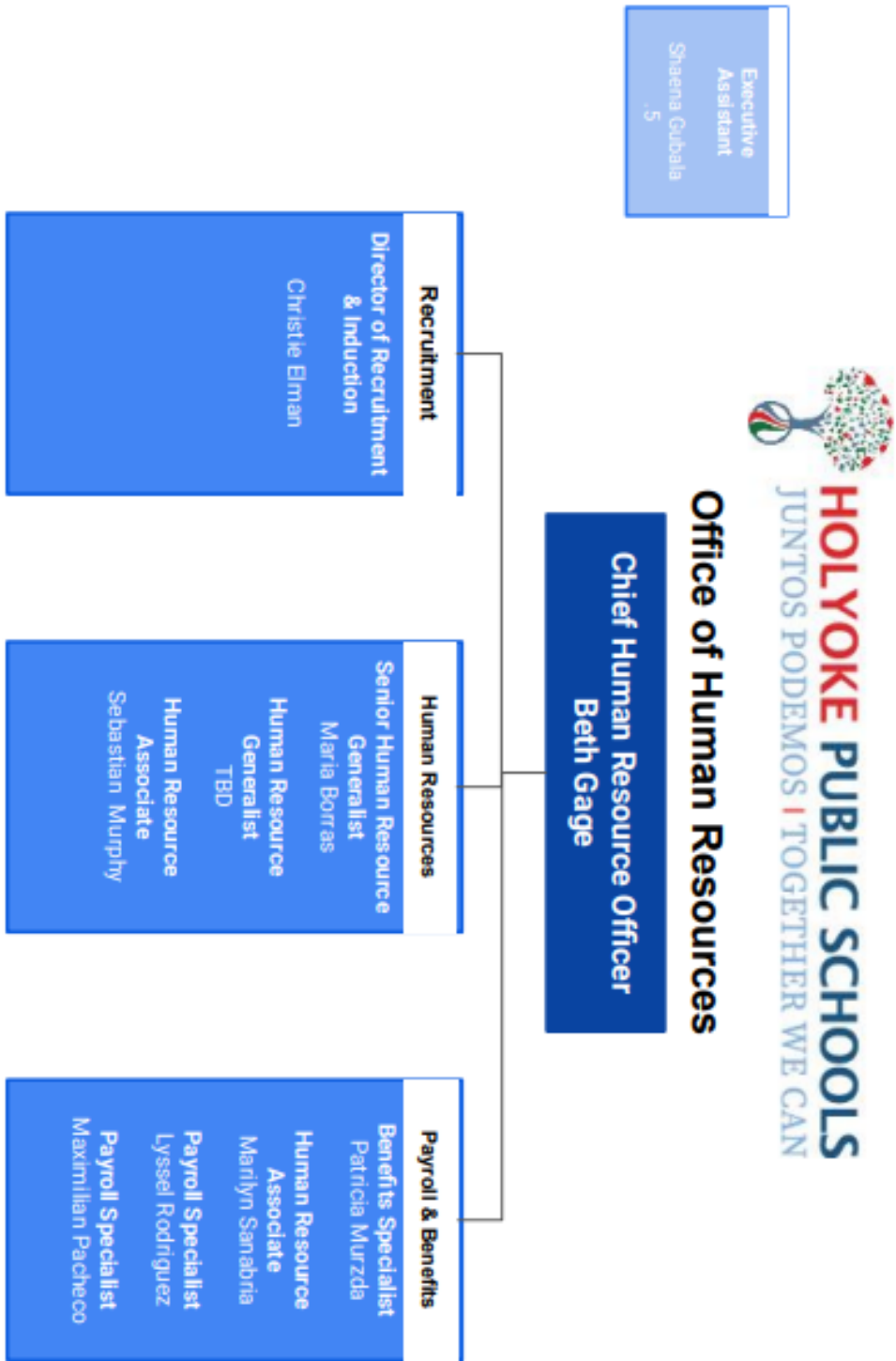


	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Operations	5,147,096	4,972,641	(174,455)	(3.4%)
Technology	2,092,895	1,977,333	(115,562)	(5.5%)
Total	7,239,991	6,949,974	(290,017)	(4.0%)

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	1,534,185	1,600,246	66,061	4.3%
Supplies/Services/Utilities	5,705,806	5,349,728	(356,078)	(6.2%)
Total	7,239,991	6,949,974	(290,017)	(4.0%)

FTE totals	<u>2023</u>	<u>2024</u>	<u>Change</u>
Funded on General Fund	23.00	23.00	0.00
Funded on Special Revenue	1.50	1.50	0.00
Total	24.50	24.50	0.00

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, payroll, employee relations, labor relations, organizational and employee development, risk management, performance management, compensation and benefits, Human Resource information management, and regulatory compliance.

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Human Resources	874,486	965,466	90,980	10.4%
	874,486	965,466	90,980	10.4%
HUMAN RESOURCES	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	640,959	746,307	105,348	16.4%
Supplies & Services	233,527	219,159	(14,368)	(6.2%)
Total	874,486	965,466	90,980	10.4%
FTE totals	<u>2023</u>	<u>2024</u>	<u>Change</u>	
Funded on General Fund	11.00	10.00	(1.00)	
Funded on Special Revenue	0.00	0.00	0.00	
Total	11.00	10.00	(1.00)	



Office of Pupil Services

Chief Pupil Services Officer
Marianne Currier

Admin Assistant
Jackie Escalera

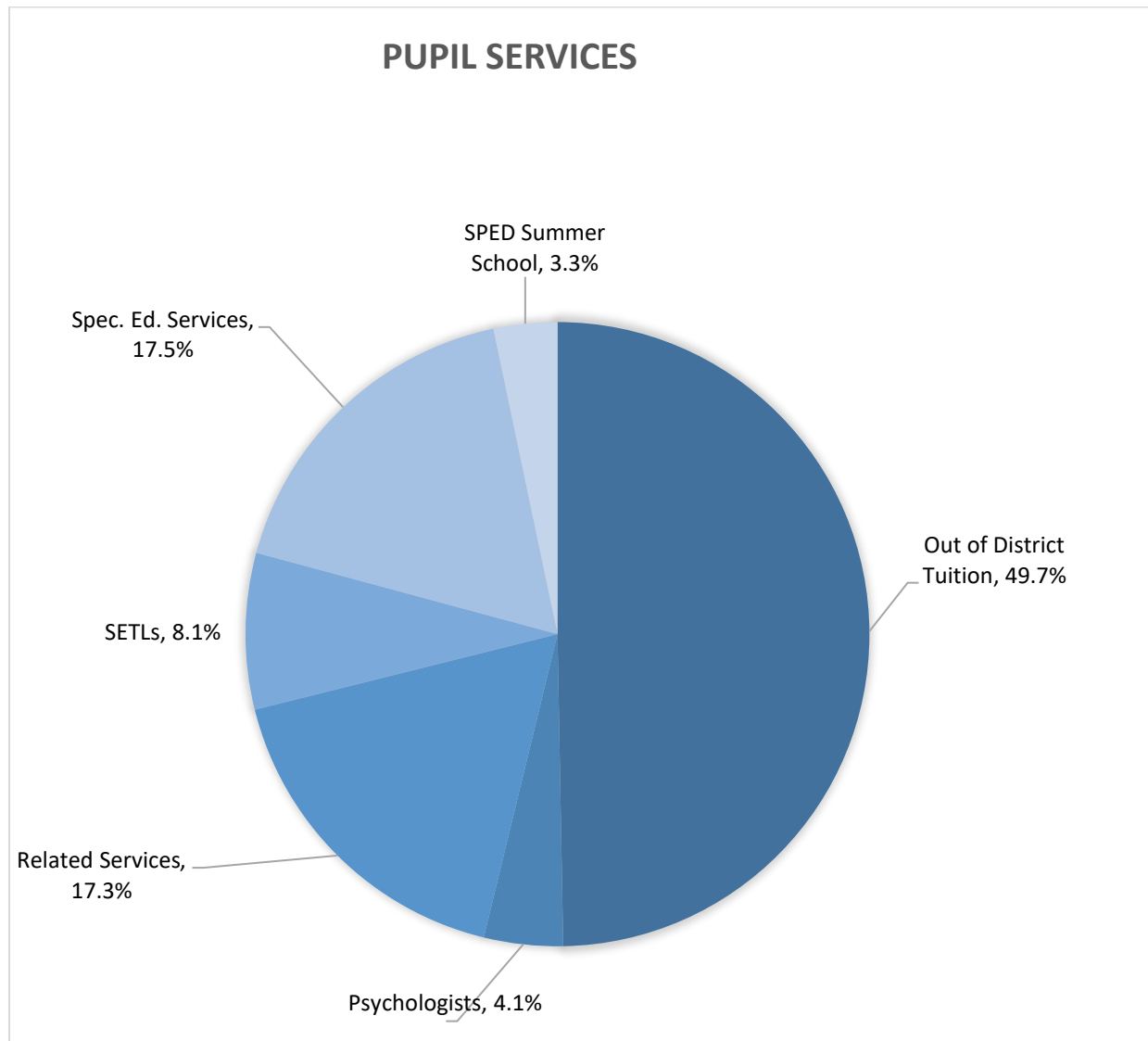
SPED Analyst
Lisa Monzon



Pupil Services

MISSION

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.

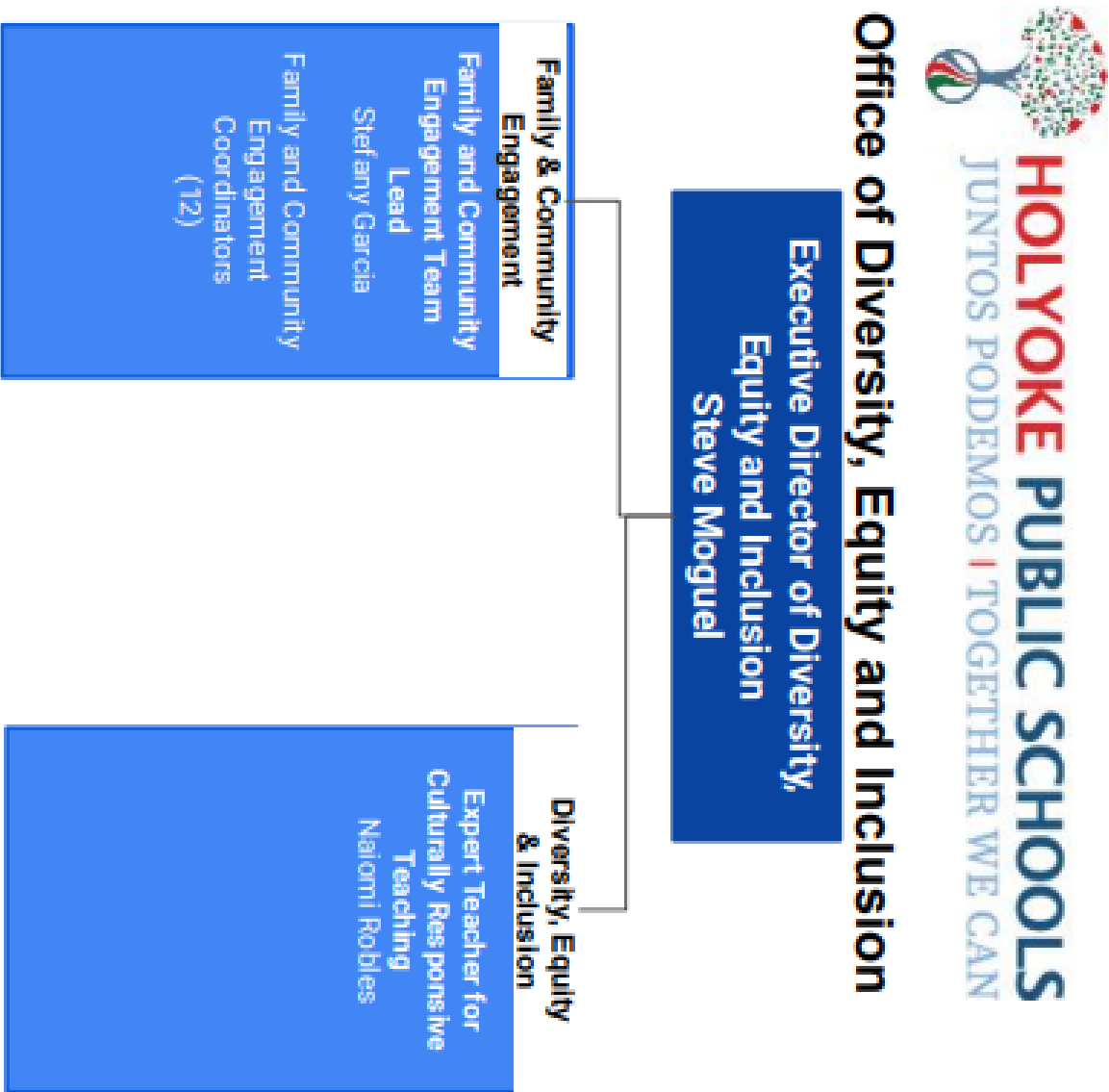


	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Out of District Tuition	4,899,645	6,124,556	1,224,911	25.0%
Psychologists	402,568	504,120	101,552	25.2%
Related Services	1,860,960	2,132,758	271,798	14.6%
SETLs	936,754	996,717	59,963	6.4%
Spec. Ed. Services	2,129,249	2,157,092	27,843	1.3%
SPED Summer School	368,480	406,355	37,875	10.3%
Total	10,597,656	12,321,598	1,723,942	16.3%

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	4,381,274	4,784,994	403,720	9.2%
Supplies & Services	6,216,382	7,536,604	1,320,222	21.2%
Total	10,597,656	12,321,598	1,723,942	16.3%

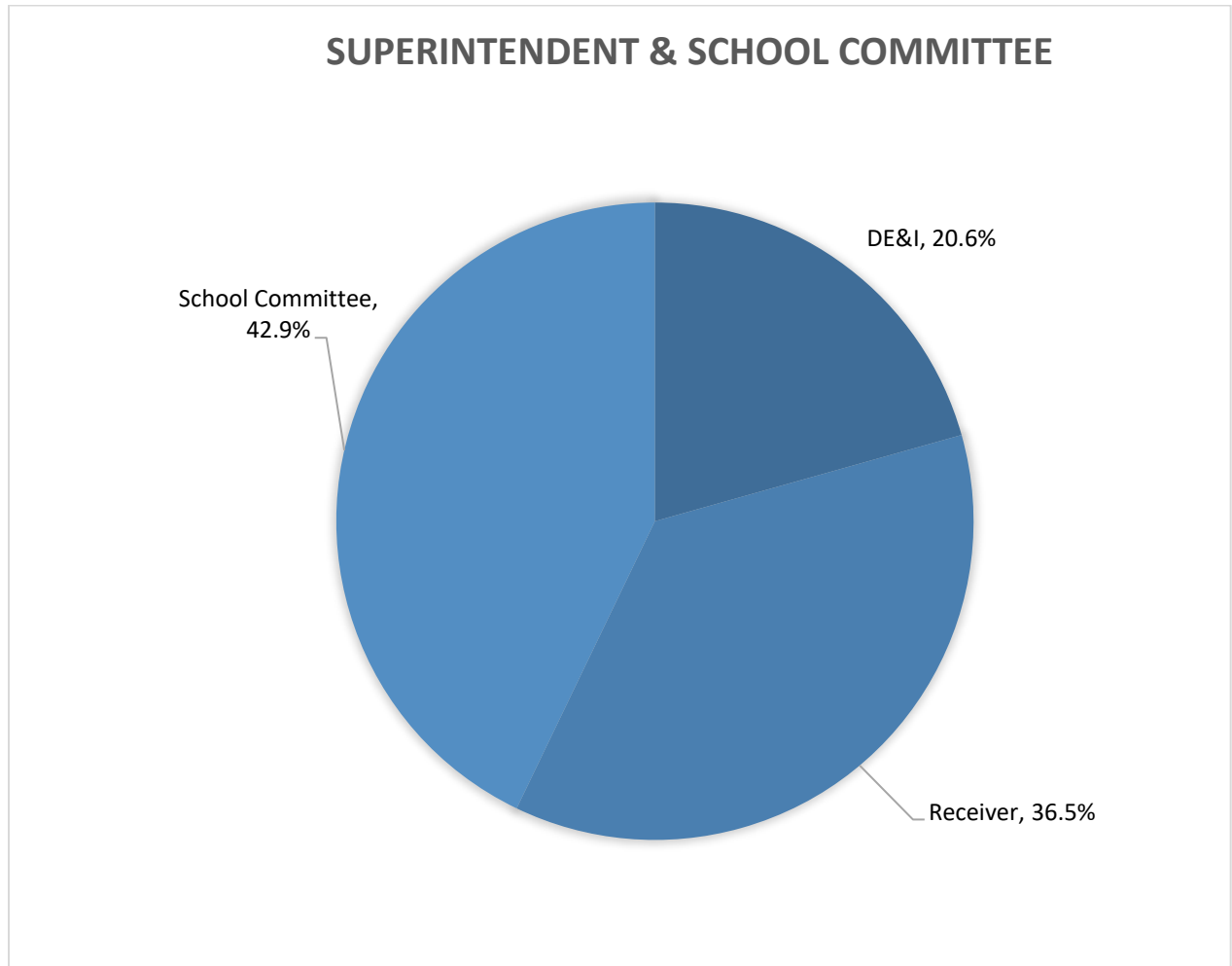
FTE totals	<u>2023</u>	<u>2024</u>	<u>Change</u>
Funded on General Fund	90.50	91.50	1.00
Funded on Special Revenue	12.75	12.75	0.00
Total	103.25	104.25	1.00

Superintendent, School Committee and Family Engagement



MISSION

The Superintendent's office provides leadership and oversight over all functions of the district. The School Committee serves as an advisory board to the Superintendent and liaises with the community. Diversity, Equity and Inclusion provides equity training for staff, champions the implementation of the district equity commitments in all aspects of our work, and leads and supports strong relationships with families and the community.



	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
DE&I	82,989	227,936	144,947	174.7%
Receiver	398,356	403,224	4,868	1.2%
School Committee	548,108	473,337	(74,771)	(13.6%)
Total	1,029,453	1,104,497	75,044	7.3%

	<u>2023</u>	<u>2024</u>	<u>Change</u>	<u>% Chg</u>
Personnel Services	252,888	387,536	134,648	53.2%
Supplies & Services	776,565	716,961	(59,604)	(7.7%)
Total	1,029,453	1,104,497	75,044	7.3%

	<u>2023</u>	<u>2024</u>	<u>Change</u>	
FTE totals				-
Funded on General Fund	1.00	2.00	1.00	
Funded on Special Revenue	14.00	12.00	(2.00)	
Total	15.00	14.00	(1.00)	

Special Revenues

SPECIAL REVENUE DETAIL

	FY 2020 Budget	FY 2021 Budget	FY 2022 Budget	FY 2023 Budget	FY 2024 Estimate
FEDERAL GRANTS					
Title I	4,829,057	5,178,147	4,810,872	4,478,130	4,343,786
Title I - School Support	1,200,000	1,087,550	685,000	191,455	
Education Emergency Relief fund (ESSER)	-	4,251,035	10,786,974	20,069,043	22,812,461
IDEA - Special Education Entitlement	1,800,282	1,961,136	2,486,499	2,071,749	1,998,474
Title IIA - Improving Educator Equality	452,362	464,605	345,562	380,787	369,363
Title III - English Language Acquisition	176,467	167,254	180,544	153,096	145,000
Title IV-A Student Support & Academic Enrichment	364,045	341,575	355,176	344,232	344,919
Perkins	174,947	182,379	152,521	184,334	184,334
McKinney Homeless	30,000	105,000	120,000	120,000	120,000
McKinney Homeless Emergency Support	26,505	-	281,133	296,503	250,000
21st Century Community Learning	826,810	593,441	467,404	372,484	352,889
Miscellaneous Federal Grants	1,668,078	451,077	465,087	360,000	350,000
TOTAL FEDERAL GRANTS	11,548,554	14,783,199	21,136,772	29,021,813	31,271,226
STATE GRANTS					
Adult Education Learning Center	201,308	118,480	128,941	128,855	129,000
Comprehensive School Health Services	188,000	188,000	170,000	170,000	170,000
Bi-lingual Programming	-	138,180	143,827	243,683	180,000
EEC Pre-K CPPI	-	625,000	665,000	478,000	478,000
Extended learning support	74,095	56,012	147,608	150,000	150,000
Support Underperforming Districts/Intervention	150,000	150,000	210,000	204,399	
Miscellaneous State Grants	741,626	560,000	354,653	336,894	350,000
TOTAL STATE GRANTS	1,355,029	1,835,672	1,820,029	1,711,831	1,457,000
Private Grants	655,030	890,000	848,455	847,775	520,000
TOTAL PRIVATE GRANTS	655,030	890,000	848,455	847,775	520,000
REVOLVING FUNDS					
Food Service Program (Ch. 548 Acts 1948)	4,600,000	4,950,000	5,200,000	5,200,000	5,200,000
Circuit Breaker (Ch. 139 Acts 2006)	2,063,466	2,524,774	2,774,563	2,571,069	2,700,000
Tuition (Ch. 71 Sec. 71F)	694,796	985,144	968,025	1,055,938	968,025
Athletics	35,000	35,000	35,000	35,000	35,000
Peg Access	110,000	81,000	70,000	70,000	70,000
Sped Tuition/Summer School	50,000	46,000	46,000	46,000	46,000
Works and Products	9,000	24,000	24,000	24,000	24,000
Rentals	40,000	10,000	8,000	8,000	8,000
Theft Damage Restitution	1,500	1,500	1,500	1,500	1,500
School Gifts and Contributions	30,000	30,000	30,000	30,000	30,000
TOTAL REVOLVING FUNDS	7,633,762	8,687,418	9,157,088	9,041,507	9,082,525
TOTAL GRANTS & SPECIAL REVENUE	21,192,375	26,196,289	32,962,344	40,622,926	42,330,751

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

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, which was fully spent before the due date of 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
Grand Total	\$57,883,378

Title I: \$4.3M

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: \$369k

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: \$2.0M

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: \$145k

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.

Title IV: \$345k

Title IVA, also referred to as the Student Support and Academic Enrichment (SSAE) program, is intended to provide all students with access to a well-rounded education, improve school conditions for student learning, and improve the use of technology in order to improve the academic achievement and digital literacy of all students. The amount of funds available to provide services in each school is determined by dividing the public-school district Title IV allocation by the district enrollment and participating private school enrollment.

Perkins: \$184k

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.

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 2024 Budget.

REVENUE

- Final State revenues will be equal to the Senate 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 2023.
- Personnel salary lost time and attrition will be \$2 million.
- Final State assessments will be equal to the Senate Ways and Means budget.
- Special education out-of-district tuition costs are increasing.
- 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.

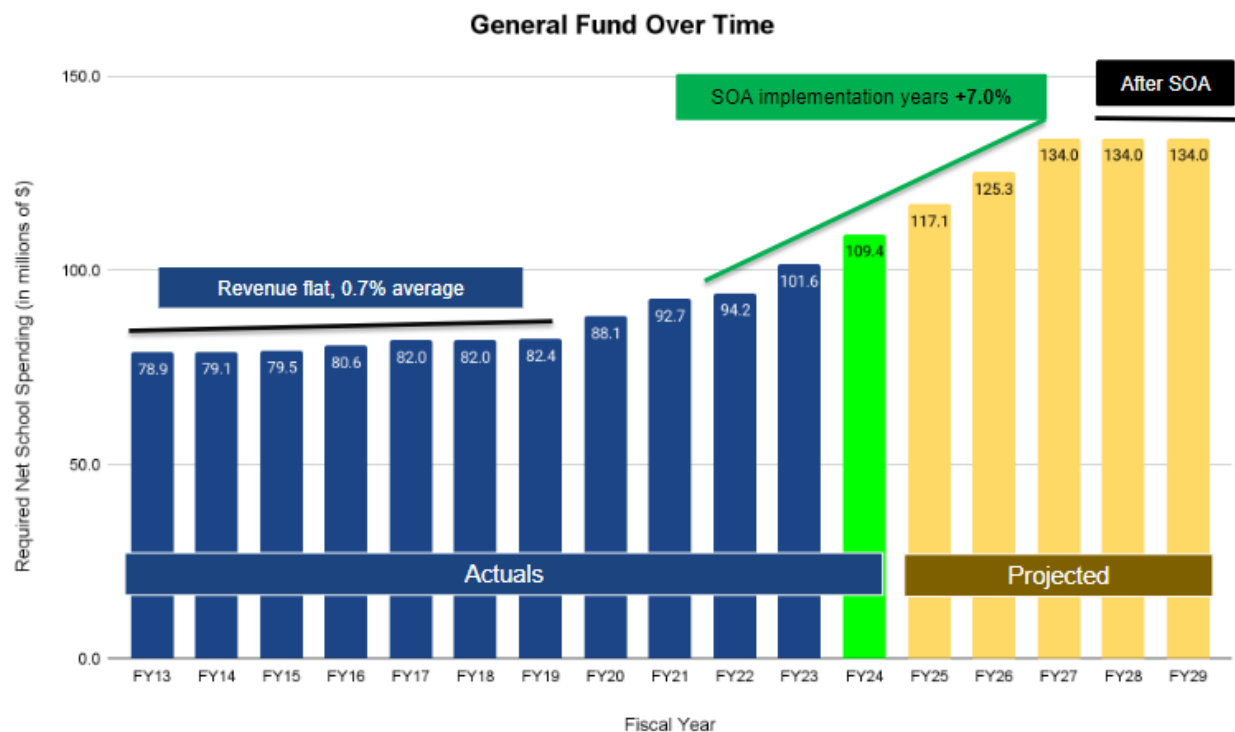
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Information

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 6th year of SOA's implementation. 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 of student learning. In future years we project more revenue than expenses but need to consider items that are funded on ESSER currently.



Projected Budgets

	<u>Final State</u> <u>Budget</u>	<u>Final Proposed</u> <u>Budget</u>	<u>Projected</u>	<u>Projected</u>	<u>Projected</u>
	FY2023	FY2024	FY2025	FY2026	FY2027
REVENUES					
Chapter 70 State Aid	89,770,485	96,959,371	102,059,646	108,183,225	114,674,218
Holyoke Required Local Contribution	11,842,864	12,452,771	13,917,224	14,752,258	15,637,393
Required Net School Spending	101,613,349	109,412,142	115,976,871	122,935,483	130,311,612
City Admin NSS (Admin and Parks)	-148,000	-148,000	(148,400)	(650,000)	(650,000)
Charter Tuition/Other Revenues	2,745,997	2,451,433	2,206,290	1,985,661	1,787,095
Adjusted Net School Spending	104,211,346	111,715,575	118,034,760	124,271,143	131,448,706
Transportation - other than Charter	8,862,267	9,591,033	10,022,629	10,473,648	10,944,962
Charter Tuition Transportation (Assessment)		465,117	483,722	503,071	523,193
Crossing guards	137,700	141,831	146,086	150,469	154,983
Medicaid	100,000	100,000	100,000	100,000	100,000
Leases not eligible for NSS	237,071	237,071	237,071	50,000	50,000
Total General Fund Budget	113,548,384	122,250,627	129,024,268	135,548,330	143,221,844
Supplemental Funding	0	0	0	0	0
TOTAL OPERATING REVENUE	113,548,384	122,250,627	129,024,268	135,548,330	143,221,844
EXPENSES					
Salaries	56,890,044	62,606,031	65,423,302	67,713,118	70,083,077
Supplies & Services	9,158,750	9,575,189	9,862,445	10,158,318	10,463,068
Total Discretionary Expenses	66,048,794	72,181,220	75,285,747	77,871,436	80,546,145
<i>Health Insurance</i>	<i>8,008,164</i>	<i>8,008,164</i>	<i>8,328,491</i>	<i>8,661,630</i>	<i>9,008,095</i>
<i>Retirement non teachers</i>	<i>2,270,407</i>	<i>2,401,482</i>	<i>2,497,541</i>	<i>2,597,443</i>	<i>2,701,341</i>
Retired Teachers Health	3,806,731	3,968,571	4,167,000	4,375,350	4,594,117
Charter Tuition/School Choice/SPED assess.	15,388,070	15,802,815	16,592,956	17,422,604	18,293,734
Other Benefits	511,000	521,000	511,000	511,000	511,000
Unemployment	300,000	200,000	300,000	300,000	300,000
Utilities	2,613,418	2,607,767	2,686,000	2,766,580	2,849,577
Out of District Tuition	4,899,645	6,124,556	6,492,029	6,881,551	7,294,444
Total Non-Discretionary Expenses *	37,797,435	39,634,355	41,575,017	43,516,157	45,552,308
One Time Funding Expiring	0	0			0
Transportation, Adult Ed, Leases (Non-NSS)	9,702,155	10,435,052	10,989,508	11,277,187	11,773,138
Sub-Total Operating Budget Expenses	113,548,384	122,250,627	127,850,272	132,664,780	137,871,591
TOTAL EXPENSES PROJECTED	113,548,384	122,250,627	127,850,272	132,664,780	137,871,591
Total Anticipated Budget Gap/Surplus	0	0	1,173,997	2,883,550	5,350,253



Schools



HOLYOKE HIGH SCHOOL

Principals: Lori McKenna, North Campus

Alan Gates, Principal Dean Campus

Geoffrey Schmidt, Principal Opportunity Academy

MESSAGE FROM THE PRINCIPALS

The Holyoke Public Schools are transforming the high school experience to ensure that every student has a high-quality educational option, with a focus on college and careers for all students. Released in SY2016-17, our innovative [High School Redesign Plan](#) creates high interest pathways for students that result in a competitive advantage after high school. The plan was developed by nearly 100 educators, students, community members and national experts with support from the Barr Foundation.

Across the North, Dean, and Opportunity campuses, every pathway:

- Prepares students for career and college success
- Has applied learning opportunities in the classroom and the community
- Is aligned to 21st century education and industry-based standards
- Provides opportunities for students to earn stackable credentials

At [North Campus](#), students select to participate in one of three theme-based academies (Performing and Media Arts, Community and Global Studies, and Engineering and Life Science). At [Dean Campus](#), students select one of the nine career, vocational and technical education (CVTE) programs. At [Opportunity Academy](#), students select between a set of alternative high school pathways that allow them to continue or restart on a pathway to a diploma if they are not succeeding in a traditional high school setting.

FY 2024 STAFFING & BUDGET SUMMARY

Holyoke High School North and Dean Campus

500 Beech Street

(413) 534-2020

Grades Served:	9-12	FY 2024 Est. Enrollment:	1,369	
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Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	115.5	127.4	128.5	147.5	146
Paraprofessionals	26	34	37	36	28
Principals/Administrators	7	7	7	9	10
Clerks	7.5	8	8	8	8
Counselors	9	11	12	16	15
Nurses	4	5	5	6	4
Custodians	14.5	14	14	14	14
Other	30.5	34	28.5	29	13
All Funds Staffing Total	214	240.4	240	265.5	238

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$9,178,621	\$10,921,524	\$10,084,189	\$11,574,189	\$12,407,794
Supplies & Services	\$216,432	\$220,137	\$371,000	\$261,827	\$236,247
Total General Fund	\$9,395,053	\$11,141,661	\$10,455,189	\$11,836,016	\$12,644,0416

FY 2024 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.

Accountability Percentile

3

Progress n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA CPI/SS	94.2	93.6	95.4	88.7	n/a	n/a	n/a	489.1	492.2	489
Math CPI/SS	80.1	78.5	81.1	69.3	n/a	n/a	n/a	478.5	480.7	480
Science CPI/SS	79.7	76.5	79	66.2	n/a	n/a	n/a	n/a	68.4	479
ELA SGP	50	42.7	50	40.3	n/a	n/a	50	48.1	50	47
Math SGP	50	38.5	50	34.5	n/a	n/a	50	26.4	50	39

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

Student Data				Teacher Data	
Attendance Rate	83	% Limited English Proficient	21.3	% of Teachers Licensed	94.7
Enrollment	1,508	% Special Education	25.5		
Graduation Rate	75	% First Language not English	43.9	% of teachers without waiver or provisional license	87.5
Dropout Rate	3.4	High Needs	86.5		
In-School Suspension Rate	3.3	% African American	3.4		
Out-of-School Suspension Rate	12	% Asian	0.5	Student / Teacher Ratio	11.4 to 1
Retention Rate	3.6	% Hispanic	80.2		
Unexcused Absences >9	55.4	% White	14.5		

WELCOME TO STEM

Holyoke STEM Academy is a Science, Technology, Engineering, and Mathematics school for around 280 students in grades 6-8. Our school is co-located on the Holyoke High School Dean Campus. STEM Academy is a pipeline into our Engineering and Life Sciences Academy (ELS) learning academy at Holyoke High School..

ABOUT STEM

STEM learning is hands-on and highly engaging for students. It promotes strong problem solving and communication skills, which are needed in all occupations. Most of the fastest growing and best paying occupations are in the STEM fields, according to the U.S. Labor Department.

OUR VISION

The STEM vision is the same as the district's: HPS is a high-performing school system where students reach their full potential, educators inspire, families are partners, and the community thrives.

STEM R.E.A.C.H.!

We **R**eflect, **E**mbrace Empathy, **A**pply Critical Thinking, **C**ommunicate Effectively, and Students **H**elp Themselves and Others.

Holyoke STEM Academy
1045 Main Street / (413) 535-0345
School hours: 7:45 a.m. - 2:30 p.m.
www.hps.holyoke.ma.us/o/STEM



Korin Hall
Principal



Alex Saldana
FACE Team
Member



James Desautels
Special Education
Team Leader

FUN FACTS ABOUT HOLYOKE STEM ACADEMY!

- **Mascot:** Rockets
- **School colors:** Navy blue, maroon, and white
- **Uniforms:** None
- **Cell phones:** Not permitted for students. Yondr bags will be provided to store student cell phones during the day.
- **Enrichment/specials:** Music, heritage language, STEM, gym
- **Special programs:** Functional, SIP, and ABL
- **More offerings:** STEM BEATS music, PBIS, Site Council, ST Math and ELA (Lexia) Interventions
- **After school:** Table tennis
- **Sports:** Volleyball, flag football, basketball
- **Class Dojo:** We use Class Dojo to communicate with families about their children, school news, and events



FY 2024 STAFFING & BUDGET SUMMARY	
Holyoke STEM Academy	
1045 Main Street	
(413) 535-0345	

Grades Served:	6-8	FY 2024 Est. Enrollment:	287	
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Staffing Summary					
Staffing Totals	2020	2021	2022	2023	2024
Teachers	18	24	26.5	30	30
Paraprofessionals	5	14	15	17	16
Principals/Administrators	1	2	2	4	4
Clerks	1	1	1	1.5	2
Counselors	1	1	1.5	2	3
Nurses	0	0	0	0	1
Custodians	0	0	0	0	0
Other	2	2	3	2	3
All Funds Staffing Total	28	44	49	56.5	59

School Budget					
General Fund	2020	2021	2022	2023	2024
Personnel Services	\$1,339,182	\$1,948,106	\$1,821,197	\$2,367,639	\$3,006,100
Supplies & Services	\$31,873	\$12,600	\$6,053	\$79,413	\$60,663
Total General Fund	\$1,371,055	\$1,960,706	\$1,827,250	\$2,447,052	\$3,066,763

FY 2024 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.

Accountability Percentile

1

Progress

n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	n/a	n/a	n/a	472.1	n/a	n/a	n/a	470.7	472.9	471
Math SS	n/a	n/a	n/a	470.4	n/a	n/a	n/a	466.7	469.1	469
Science SS	n/a	n/a	n/a	475.2	n/a	n/a	n/a	473.4	476.5	472
ELA SGP	n/a	n/a	n/a	34.9	n/a	n/a	50	29	50	42
Math SGP	n/a	n/a	n/a	28.7	n/a	n/a	50	23	50	37

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

Student Data				Teacher Data	
Attendance Rate	85.1	% Limited English Proficient	22.7	% of Teachers Licensed	90.8
Enrollment	256	% Special Education	32.4		
Graduation Rate	--	% First Language not English	39.5	% of teachers without waiver or provisional license	90.8
Dropout Rate	--	High Needs	94.1		
In-School Suspension Rate	2.2	% African American	3.5		
Out-of-School Suspension Rate	17.7	% Asian	0	Student / Teacher Ratio	11.8 to 1
Retention Rate	0.4	% Hispanic	81.3		
Unexcused Absences >9	57.4	% White	13.3		

WELCOME TO DONAHUE

Maurice A. Donahue School serves around 440 students in grades PreK-5 from across the City of Holyoke. We provide intentional, specialized support to create an environment for all students to learn and grow.

OUR CULTURE

We put students first by creating an inclusive learning community. We believe in all of our students and the inherent value they bring to every learning space. We celebrate the success and growth of all students.

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 prepared for life, career, and college.

AFTER SCHOOL

We offer a variety of after school activities including the Connections program, an award-winning table tennis club, and a mentoring program.

Maurice A. Donahue School

210 Whiting Farms Road | (413) 534-2069

School hours: 8:45 a.m. - 3:30 p.m.

(Doors open at 8:30 a.m. for breakfast in the classroom)

www.hps.holyoke.ma.us/o/Donahue



Marc Swygert
Principal



Stefany Garcia
FACE Team
Member



Dan Cavanaugh
Special Education
Team Leader



Launa Kazeroid
Special Education
Team Leader

FUN FACTS ABOUT DONAHUE!

- **Mascot:** Dolphins
- **School colors:** Royal blue
- **Uniforms:** Royal blue or black polos, and black or khaki pants
- **Electives:** Physical education, health, music, library/media, art
- **Special programs:** Before-school care (registration required), February Academy, April Academy, Saturday School (five sessions in spring)
- **For families:** Volunteering opportunities in PTO, Site Council, classroom activities, book fairs, cafeteria support, and family school events.



FY 2024 STAFFING & BUDGET SUMMARY	
Donahue School	
Whiting Farm Road	
(413) 534-2069	

Grades Served:	PK-5	FY 2024 Est. Enrollment:	445	
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Staffing Summary					
Staffing Totals	2020	2021	2022	2023	2024
Teachers	40	38	38	42	49
Paraprofessionals	47	53	53	62	55
Principals/Administrators	3	3	3	4	4
Clerks	1	1	1	1	2
Counselors	2	2	2	2	3
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	6.5	6	6	7	4
All Funds Staffing Total	104.5	108	108	123	121

School Budget					
General Fund	2020	2021	2022	2023	2024
Personnel Services	\$4,113,620	\$4,148,488	\$3,630,171	\$4,230,139	\$5,578,591
Supplies & Services	\$7,517	\$16,136	\$38,913	\$32,381	\$45,009
Total General Fund	\$4,121,137	\$4,164,624	\$3,669,084	\$4,262,520	\$5,623,600

FY 2024 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 n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	481.8	477.3	479.2	481.4	n/a	n/a	n/a	475.9	478.6	474
Math SS	475.2	472	473.6	474.5	n/a	n/a	n/a	463.7	466.6	463
Science CPI/SS	49.3	41.8	44.9	45.6	n/a	n/a	n/a	475	477.7	473
ELA SGP	50	37.9	50	49.4	n/a	n/a	50	30.3	50	45
Math SGP	50	40.7	50	49.6	n/a	n/a	50	30.8	50	36

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

Student Data				Teacher Data	
Attendance Rate	88.3	% Limited English Proficient	15.9	% of Teachers Licensed	91.7
Enrollment	391	% Special Education	39.6		
Graduation Rate	--	% First Language not English	27.4	% of teachers without waiver or provisional license	88.9
Dropout Rate	--	High Needs	96.9		
In-School Suspension Rate	0.9	% African American	4.3		
Out-of-School Suspension Rate	8	% Asian	0.5	Student / Teacher Ratio	10.9 to 1
Retention Rate	0.6	% Hispanic	82.1		
Unexcused Absences >9	52.5	% White	11.5		

WELCOME TO KELLY

Kelly School serves around 470 students in grades PreK-5—and their families—in the Flats neighborhood of Holyoke.

OUR CULTURE

Relationships are at the heart of what we do. We are a safe, supportive, respectful community where students achieve, parents are partners, teachers are leaders, and all languages and cultures are valued and built upon.

DUAL LANGUAGE

Kelly School has a growing Dual Language program for students in grades K-2. This is a comprehensive two-way Immersion Model of Dual Language instruction that promotes academic excellence in two languages: English and Spanish.

OUR MISSION

Through a focus on developing trusting relationships and providing high-quality instruction, Kelly School students see themselves as achievers who can think critically to overcome any challenges on their way to success.

Dr. Marcella R. Kelly School
216 West Street / (413) 534-2078
School hours: 8:45 a.m. - 3:30 p.m.



Aaron Morris
Principal



Lisa Rosario
FACE Team
Member

Tricia Ruell

Special Education
Team Leader

FUN FACTS ABOUT KELLY!

- **Mascot:** Eagles
- **School colors:** Blue and yellow
- **Uniforms:** Light blue or navy blue tops; navy blue or khaki bottoms
- **Electives:** Art, music, and physical education
- **Special programs:** Enrichment opportunities with Enchanted Circle and HBGC



FY 2024 STAFFING & BUDGET SUMMARY

Kelly School

216 West Street

(413) 534-2078

Grades Served: PK-5

FY 2024 Est. Enrollment: 487

Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	32	28	30.5	38.5	45.5
Paraprofessionals	11	9	11	11	24
Principals/Administrators	2	2	4	4	4
Clerks	1.5	2	2	2	2
Counselors	2	2	2	2	3
Nurses	1	1	1	1	3
Custodians	4.5	4.5	4.5	4.5	4.5
Other	1.8	4	3.5	3	3
All Funds Staffing Total	61.5	55.8	58.5	66	89

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$2,534,962	\$2,352,720	\$2,047,275	\$2,513,208	\$3,995,425
Supplies & Services	\$31,738	\$69,059	\$870	\$16,529	\$55,937
Total General Fund	\$2,566,700	\$2,421,779	\$2,048,145	\$2,529,737	\$4,051,362

FY 2024 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 n/a*
*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.			

Accountability Targets & Actual										
CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	473.7	473.1	475	474.2	n/a	n/a	n/a	472.8	474.7	468
Math SS	473.5	467.5	469.1	470.3	n/a	n/a	n/a	460.1	461.5	459
Science CPI/SS	35.2	38.6	41.7	39.6	n/a	n/a	n/a	469.3	472.6	n/a
ELA SGP	50	43.5	50	51.1	n/a	n/a	50	39.1	50	37
Math SGP	50	34.1	50	43.5	n/a	n/a	50	31.8	50	25
<p>*Refer to http://www.doe.mass.edu for additional information as these results reflect peer groups in MA.</p>										

Student Data				Teacher Data	
Attendance Rate	86.3	% Limited English Proficient	19.8	% of Teachers Licensed	93.2
Enrollment	303	% Special Education	21.1		
Graduation Rate	--	% First Language not English	38.0	% of teachers without waiver or provisional license	100
Dropout Rate	--	High Needs	97.0		
In-School Suspension Rate	8.1	% African American	3.6		
Out-of-School Suspension Rate	3.3	% Asian	0.0	Student / Teacher Ratio	13.8 to 1
Retention Rate	0	% Hispanic	91.4		
Unexcused Absences >9	60.3	% White	4.3		

WELCOME TO MCMAHON

McMahon School serves around 320 students in grades PreK-5 in the lower Rock Valley neighborhood of the City of Holyoke. In partnership with families and community, we pride ourselves on our efforts to ensure we support the whole child, both academically and socially.

OUR CULTURE

Our work is grounded in equity and our belief that all students have the ability to do high-quality work and reach or exceed grade-level expectations in a supportive, safe environment.

OUR MISSION

Through culturally responsive instruction, high expectations for students and staff, and targeted, individualized support, Lt. Elmer J. McMahon School ensures all learners develop the academic and social-emotional foundation necessary to succeed in high school and beyond.

OUR VISION

Our school's vision is to support our learners to be curious, critical thinkers connected to our school community while fostering a positive sense of self and a drive to achieve at high levels academically and in life.

Lt. Elmer J. McMahon School Elementary School

75 Kane Road / (413) 534-2062/63
School hours: 7:45 a.m. - 2:30 p.m.
www.hps.holyoke.ma.us/o/McMahon



**Karyn
McDermott**
Principal

To Be Announced

FACE Team
Member

Heather Messier

Special Education
Team Leader

FUN FACTS ABOUT McMAHON

- **Mascot:** Cheetah
- **School colors:** Navy blue, light blue, and white
- **Uniforms:** TBD
- **Student supports:** McMahon After School Program K-1, Connections 2-5
- **Enrichment/specials:** Art, physical education, health, music
- **For families:** Back to School Event, Literacy Night, Math Night, Bingo for Books, Holiday Festival, Spring Showcase



FY 2024 STAFFING & BUDGET SUMMARY	
McMahon School	
75 Kane Road	
(413) 534-2062	

Grades Served:	PK-5	FY 2024 Est. Enrollment:	338	
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Staffing Summary					
Staffing Totals	2020	2021	2022	2023	2024
Teachers	31	31	34.5	37	38
Paraprofessionals	15	21	20	21	18
Principals/Administrators	2	2	2	3	4
Clerks	1	1	1	1	2
Counselors	2	2	2	2	3
Nurses	1	1	1	2	1
Custodians	3	3	3	3	3
Other	4	2	4	5	1
All Funds Staffing Total	59	63	67.5	74	73

School Budget					
General Fund	2020	2021	2022	2023	2024
Personnel Services	\$2,681,132	\$2,793,677	\$2,795,670	\$3,037,289	\$3,681,944
Supplies & Services	\$6,000	\$14,663	\$24,510	\$60,024	\$62,500
Total General Fund	\$2,687,132	\$2,808,340	\$2,820,180	\$3,097,313	\$3,744,444

FY 2024 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

8

Progress

n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	488.6	488.5	490.4	489.4	n/a	n/a	n/a	481.3	483.2	479
Math SS	480.3	480.2	481.8	479.8	n/a	n/a	n/a	470.6	472	476
Science CPI/SS	52.1	50.5	53.6	58.8	n/a	n/a	n/a	475.6	478.9	481
ELA SGP	50	45.7	50	52.5	n/a	n/a	50	36.5	50	43
Math SGP	50	40.5	50	44	n/a	n/a	50	33.6	50	48

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

Student Data				Teacher Data	
Attendance Rate	90	% Limited English Proficient	10.5	% of Teachers Licensed	100.0
Enrollment	344	% Special Education	31.1		
Graduation Rate	--	% First Language not English	21.5	% of teachers without waiver or provisional license	96.6
Dropout Rate	--	High Needs	83.1		
In-School Suspension Rate	2.4	% African American	2.6		
Out-of-School Suspension Rate	6.1	% Asian	2	Student / Teacher Ratio	11.7 to 1
Retention Rate	0.7	% Hispanic	62.5		
Unexcused Absences >9	42.4	% White	29.7		

WELCOME TO LAWRENCE

Located across from the Holyoke Public Library, H.B. Lawrence Elementary School serves around 350 students in grades preK-5 in the Churchill neighborhood of Holyoke.

OUR SCHOOL CULTURE

We strive to create an inclusive and welcoming learning environment for all of our students and families. In partnership with families and community, we meet students where they are and provide them with the supports they need to grow and meet their full potential.

OUR MISSION AND VALUES

Lawrence students engage in critical thinking and problem solving, and demonstrate their thinking and understanding orally and in writing in all content areas. Our values inform our work and reflect our commitment to lifelong learning.

OUR STAFF AND STUDENTS

- Reflect and persist
- Embrace empathy and kindness
- Apply critical thinking
- Communicate effectively
- Help ourselves and others

H.B. Lawrence Elementary School

156 Cabot Street / (413) 534-2075

School hours: 8:45 a.m. - 3:30 p.m.

www.hps.holyoke.ma.us/o/Lawrence



Catherine Hourihan

Principal



Sadie Cora

Assistant Principal



Myriam Rodriguez

FACE Team Member



Katie Vitorino

Special Education Team Leader

FUN FACTS ABOUT LAWRENCE

- **Mascot:** Lancers
- **School colors:** Navy blue and white
- **Uniforms:** TBD
- **Afterschool programs/opportunities** through community partners Boys and Girls Club, Homework House, and YMCA
- **Enrichment/specials:** Art, music, physical education, STEAM (science, technology, art, and mathematics), library, social-emotional learning
- **For families:** Monthly family coffee hour, monthly all-school rallies, annual math & literacy night



FY 2024 STAFFING & BUDGET SUMMARY

Lawrence School

156 Cabot Street

(413) 534-2075

Grades Served: PK-5

FY 2024 Est. Enrollment: 362

Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	19	18.5	23.2	22.5	39
Paraprofessionals	4	6	10	7	14
Principals/Administrators	2	2	3	3	4
Clerks	1.5	1.5	1.5	2	2
Counselors	2	2	3	3	3
Nurses	1	1	1	1	1
Custodians	3.5	3.5	3.5	3.5	3.5
Other	11	11	7	9	2
All Funds Staffing Total	44	45.5	52.2	51	68.5

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$1,619,136	\$1,705,006	\$1,509,204	\$1,749,488	\$3,248,213
Supplies & Services	\$61,581	\$10,000	\$2,411	\$8,732	\$96,144
Total General Fund	\$1,821,693	\$1,680,717	\$1,715,006	\$1,758,220	\$3,344,357

FY 2024 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

--

Progress

n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	479.7	477.5	n/a	481.7	n/a	n/a	n/a	477	478.5	476
Math SS	474.5	465.8	n/a	476.6	n/a	n/a	n/a	464.4	465.8	468
Science CPI/SS	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a		n/a
ELA SGP	n/a	n/a	n/a	n/a	n/a	n/a	50	n/a	50	N/A
Math SGP	n/a	n/a	n/a	n/a	n/a	n/a	50	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	84.5	% Limited English Proficient	12.4	% of Teachers Licensed	97.2
Enrollment	186	% Special Education	16.1		
Graduation Rate	--	% First Language not English	25.3	% of teachers without waiver or provisional license	96.7
Dropout Rate	--	High Needs	97.8		
In-School Suspension Rate	0.0	% African American	4.8		
Out-of-School Suspension Rate	5.5	% Asian	0.5	Student / Teacher Ratio	10.3 to 1
Retention Rate	0.7	% Hispanic	86.6		
Unexcused Absences >9	51.9	% White	6.5		

WELCOME TO METCALF

Metcalf School serves around 225 students in Grades 6-8. We encourage a strong middle school experience with four choices for student electives. We house a SIP program, as well as RISE and SIP Functional programs for middle school students. We encourage students to maintain good attendance and to be on time and ready to learn each morning.

OUR CULTURE

We are committed to a safe and culturally responsive approach to teaching and learning. Everyone at Metcalf has a voice and is welcome.

OUR MISSION

To provide a challenging and rigorous education to students in a safe environment.

WHAT WE OFFER

Students take four core classes (Math, Science, English Language Arts, and History/Ethnic studies). They also take Physical Education/Health, STEM, Art, and Music for electives.

Joseph Metcalf School

2019 Northampton Street / (413) 534-2104
School hours: 7:45 a.m. - 2:30 p.m.
www.hps.holyoke.ma.us/o/Metcalf



Kate Ritchie
Principal

Eric Rodriguez

FACE Team
Member

Ybelka Medina

Special Education
Team Leader

FUN FACTS ABOUT METCALF!

- **Mascot:** Wildcats
- **School colors:** Aqua blue, black
- **Uniforms:** TBD
- **Cell phones:** Not permitted for students. Yondr bags will be provided to store student cell phones during the day.
- **Electives:** Physical Education and Health, STEM, Art, Music
- **Special programs:** SIP, Rise Functional
- **For families:** Back to School events and bi-monthly celebration nights for families, attendance celebrations, and school-wide PBIS



FY 2024 STAFFING & BUDGET SUMMARY

Metcalfe School

2019 Northampton Street

(413) 534-2104

Grades Served:

6-8

FY 2024 Est. Enrollment:

224

Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	18.3	24	30.5	40	33
Paraprofessionals	7	8	8	12	14
Principals/Administrators	1	2	2	4	4
Clerks	1.5	1.5	1.5	2	2
Counselors	1	1	1.5	2	3
Nurses	1	1	2	2	1
Custodians	2	2	3	3	3
Other	1	0	1	1	3
All Funds Staffing Total	32.8	39.5	49.5	66	63

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$1,595,421	\$2,024,488	\$2,133,135	\$3,036,488	\$3,210,122
Supplies & Services	\$61,580	\$11,450	\$9,652	\$47,943	\$50,420
Total General Fund	\$1,657,001	\$2,035,938	\$2,142,787	\$3,084,431	\$3,260,542

FY 2024 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

10

Progress

n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	n/a	495.3	496.3	499.3	n/a	n/a	n/a	475.9	490	481
Math SS	n/a	490.8	492.4	495.7	n/a	n/a	n/a	463.7	475.4	479
Science CPI/SS	n/a	n/a	n/a	n/a	n/a	n/a	n/a	475	483.6	477
ELA SGP	n/a	n/a	50	35.5	n/a	n/a	50	30.3	50	43
Math SGP	n/a	n/a	50	32.3	n/a	n/a	50	30.8	50	46

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

Student Data				Teacher Data	
Attendance Rate	90.3	% Limited English Proficient	28.9	% of Teachers Licensed	73.4
Enrollment	343	% Special Education	21		
Graduation Rate	--	% First Language not English	46.1	% of teachers without waiver or provisional license	86.9
Dropout Rate	--	High Needs	77.6		
In-School Suspension Rate	4.3	% African American	1.7		
Out-of-School Suspension Rate	5.3	% Asian	0.0	Student / Teacher Ratio	12.2 to 1
Retention Rate	1.1	% Hispanic	74.9		
Unexcused Absences >9	38.3	% White	21.3		

WELCOME TO MORGAN

Morgan Elementary serves around 300 students in grades PreK-5 in the South Holyoke neighborhood of Holyoke. We offer three program options for pre-kindergarten students, all staffed by Morgan employees.

OUR CULTURE

Anti-racist and equity work is difficult and ongoing, but at Morgan, we understand and know it is essential. We view effective differentiation as our road map to success, along with our unwavering belief that all students will achieve daily and year-long learning goals.

OUR MISSION

Our work is grounded in equity and race. We recognize that Holyoke is an amazing community with a vibrant Latinx/o/a student population. We are committed to dismantling structural and institutional racism that impacts our students' experiences inside and outside the classroom.

OUR VISION

With support from educators, our students have the confidence, perseverance, and persistence to tackle the challenges of doing high-quality, grade-level work to be successful and become independent learners.

William G. Morgan Elementary School
596 South Bridge Street / (413) 534-2083/84
School hours: 8:45 a.m. - 3:30 p.m.
www.hps.holyoke.ma.us/o/Morgan



Sacha Garcia-Mailloux
Principal



Rey Figueroa
FACE Team Member



Tara Bronner
Special Education Team Leader

FUN FACTS ABOUT MORGAN!

- **Mascot:** Jaguar
- **School colors:** Purple, black and white
- **Uniforms:** TBD
- **Student supports:** Tutoring in ELA, Math, and Science
- **Afterschool:** Connections, Ubuntu Program, Project Coach, Art, Jewelry-Making, Dance, Girls Inc., BOKs
- **For families:** Back to School Event, Family Night, Math Night Literacy Night, Bingo for Books, Fall Family Festival



FY 2024 STAFFING & BUDGET SUMMARY

Morgan School

596 South Bridge Street

(413) 534-2083

Grades Served:

PK-5

FY 2024 Est. Enrollment:

313

Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	24.6	24.1	29	32	41
Paraprofessionals	21	23	20	21	29
Principals/Administrators	2	2	3	3	4
Clerks	2	2	2	2	2
Counselors	1	2	2	2	3
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	4	5	5	6	2
All Funds Staffing Total	48	59.6	66	71	86

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$2,504,116	\$2,556,184	\$2,544,522	\$2,963,823	\$4,290,252
Supplies & Services	\$68,225	\$52,306	\$57,038	\$20,669	\$57,961
Total General Fund	\$2,572,341	\$2,608,490	\$2,601,560	\$2,984,492	\$4,348,213

FY 2024 SCHOOL REPORT CARD

Morgan School

596 South Bridge Street

(413) 534-2083

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 n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	483.1	482.1	489.1	491	n/a	n/a	n/a	478.2	480.1	474
Math SS	479.7	479	481.3	479	n/a	n/a	n/a	457.7	459.1	466
Science CPI/SS	47	48.4	n/a	n/a	n/a	n/a	n/a	n/a		n/a
ELA SGP	50	44.8	50	30.3	n/a	n/a	n/a	n/a	50	44
Math SGP	50	43.4	50	44.7	n/a	n/a	n/a	n/a	50	43

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

Student Data				Teacher Data	
Attendance Rate	85.2	% Limited English Proficient	11	% of Teachers Licensed	100.0
Enrollment	283	% Special Education	20.1		
Graduation Rate	--	% First Language not English	30.4	% of teachers without waiver or provisional license	90.5
Dropout Rate	--	High Needs	98.9		
In-School Suspension Rate		% African American	5.3		
Out-of-School Suspension Rate		% Asian	0	Student / Teacher Ratio	13.5 to 1
Retention Rate	0	% Hispanic	90.8		
Unexcused Absences >9	58.5	% White	3.2		

WELCOME TO SULLIVAN

Sullivan Middle School serves around 530 students in grades 6-8 and provides a rigorous curriculum to all students with the expectation that all of our students can succeed and thrive in their classrooms. Our school is the home for middle school Dual Language students and also the home for students in SHINE and the TIP program.

OUR VALUES

Sullivan Middle School shares the same core values as all other Holyoke schools, which reflect the key qualities in the district's Profile of a Learner that spell out **REACH** as an acronym:

- **Reach** and persist
- **Embrace** empathy and kindness
- **Apply** critical thinking
- **Communicate** effectively
- **Help** ourselves and others.

OUR SUPPORTS

We believe students who receive services via IEPs and students who are English learners bring tremendous assets to their education. Our goal is to see and honor those assets while providing supports in an inclusive environment.

OUR MISSION AND VISION

In our first year as a middle school, we will work with family members, students, and staff to develop a mission and vision that conveys our shared commitment to the success of the students we serve.

Sullivan School

400 Jarvis Avenue / (413) 534-2060
School hours: 8:45 a.m. - 3:30 p.m.
www.hps.holyoke.ma.us/o/Sullivan



Rue Ratray
Principal



Adriana Colon
FACE Team Member



Lizzy Swoboda
Special Education Team Leader

FUN FACTS ABOUT SULLIVAN!

- **Mascot:** Stallions
- **School colors:** Green and white
- **Dress code:** TBD
- **Cell phones:** Not permitted for students. Yondr bags will be provided to store student cell phones during the day.
- **After-school activities:** Art club, basketball, track and cross country, music club, GSA
- **Enrichment:** Fitness, art, music, world language, heritage language
- **Special programs:** We are home to the Teen Clinic and support River Valley services in our building



FY 2024 STAFFING & BUDGET SUMMARY

Sullivan School

400 Jarvis Avenue

(413) 534-2060

Grades Served: 6-8

FY 2024 Est. Enrollment: 538

Staffing Summary

Staffing Totals	2020	2021	2022	2023	2024
Teachers	37	37	40.3	45	54.5
Paraprofessionals	20	21	21	26.5	11
Principals/Administrators	3	2	3	4	7
Clerks	1.5	1.5	2	2	3
Counselors	2	3	3	3	7
Nurses	3	3	3	3	3
Custodians	5	5	5	5	5
Other	5.5	7	5	5	5
All Funds Staffing Total	76.5	77	79.5	93.5	95.5

School Budget

General Fund	2020	2021	2022	2023	2024
Personnel Services	\$3,177,868	\$3,223,616	\$3,152,756	\$3,558,063	\$5,039,241
Supplies & Services	\$49,928	\$33,347	\$7,266	\$18,236	\$84,624
Total General Fund	\$3,306,754	\$3,227,796	\$3,256,963	\$3,576,299	\$5,123,865

FY 2024 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

3

Progress n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	492.1	489.9	491.8	488.4	n/a	n/a	n/a	475.6	477.1	474
Math SS	490.7	485.9	487.5	485.4	n/a	n/a	n/a	470.5	471.5	472
Science CPI/SS	61.2	58.3	61.4	54.2	n/a	n/a	n/a	469.6	472	478
ELA SGP	50	43.8	50	42.9	n/a	n/a	50	22.2	50	41
Math SGP	50	41.8	50	50.8	n/a	n/a	50	28.9	50	44

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

Student Data				Teacher Data	
Attendance Rate	88.3	% Limited English Proficient	15.5	% of Teachers Licensed	97.3
Enrollment	444	% Special Education	25.2		
Graduation Rate	--	% First Language not English	33.6	% of teachers without waiver or provisional license	87.9
Dropout Rate	--	High Needs	90.1		
In-School Suspension Rate	0.8	% African American	2		
Out-of-School Suspension Rate	3.1	% Asian	1.1	Student / Teacher Ratio	12.2 to 1
Retention Rate	0	% Hispanic	85.8		
Unexcused Absences >9	48.4	% White	9.5		

WELCOME TO E.N. WHITE

We serve around 450 students in grades PreK-5 in the Highlands of Holyoke. We strive to create an inclusive and welcoming learning environment for all. In partnership with families and community, we meet students where they are and provide them the supports they need to grow and meet their full potential.

OUR MISSION

At E.N. White, our mission is that all scholars will be prepared for college and career options through a focus on building strong language skills, multiculturalism, and accomplishing high levels of academic achievement.

OUR VISION

We envision being a community of learning in which all decision-making focuses on students' academic and social growth. Every adult and child is valued, respected, and challenged to live out the principles of dual language learning: attaining bilingualism, biliteracy, and cross cultural competence.

OUR PROGRAMS

E.N. White School proudly offers a Two Way Dual Language Immersion Program for grades Pre-K-5. Our programmatic model encompasses the three pillars of dual language education:

- Bilingualism and biliteracy
- Grade-level academic achievement
- Cross-cultural competence

E.N. White School

1 Jefferson Street / (413) 534-2057
School hours: 8:45 a.m. - 3:30 p.m.
www.hps.holyoke.ma.us/o/ENWhite



Amy Burke
Principal



Daisy Rentas
FACE Team
Member



Kelly Grasso
Special Education
Team Leader

Amy Piedra
Assistant Principal

Bryan Bracey
Dean of Students

Abby Serrano
Dean of Management & Operations

Militza Semidei
ELA Coach

Prospere
Math Coach

FUN FACTS ABOUT E.N WHITE!

- **Mascot:** Tigers
- **School colors:** Orange and navy blue
- **Uniforms:** None
- **Special programs:** Physical education, music, art, health and STEAM

FY 2024 STAFFING & BUDGET SUMMARY	
E. N. White School	
1 Jefferson Street	
(413) 534-2058	

Grades Served:	PK-5	FY 2024 Est. Enrollment:	460	
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Staffing Summary					
Staffing Totals	2020	2021	2022	2023	2024
Teachers	30	30	34.5	38.5	44
Paraprofessionals	27	32	34	40	10
Principals/Administrators	3	3	3	4	4
Clerks	1	1	1	1	2
Counselors	1	1	2	2	3
Nurses	1	1	1	1	1
Custodians	4	4	4	4	4
Other	4.5	5	5	5	4
All Funds Staffing Total	71.5	77	84.5	95.5	72

School Budget					
General Fund	2020	2021	2022	2023	2024
Personnel Services	\$2,876,422	\$2,968,391	3,052,997	\$3,583,019	\$4,028,334
Supplies & Services	\$8,147	\$12,238	\$31,951	\$39,064	\$99,362
Total General Fund	\$2,884,569	\$2,980,629	\$3,084,948	\$3,622,083	\$4,127,696

FY 2024 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

8

Progress

n/a*

*DESE did not issue accountability determinations in 2021, so progress metrics are not available for 2022.

Accountability Targets & Actual

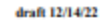
CPI & Growth by Subject	2018 Target	2018 Actual	2019 Target	2019 Actual	2020 Target	2020 Actual	2021 Target	2021 Actual	2022 Target	2022 Actual
ELA SS	475.9	475.9	483.2	486.5	n/a	n/a	n/a	475.6	485.6	478
Math SS	473.5	473.9	477.7	480.1	n/a	n/a	n/a	470.5	470.5	470
Science CPI/SS	37.7	44.1	51.9	52.8	n/a	n/a	n/a	469.6	473.6	471
ELA SGP	50	39.3	50	59.5	n/a	n/a	50	22.2	50	38
Math SGP	50	49	50	60.1	n/a	n/a	50	28.9	50	32

*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	8.3	% of Teachers Licensed	93.8
Enrollment	411	% Special Education	24.1		
Graduation Rate	--	% First Language not English	18.5	% of teachers without waiver or provisional license	90.8
Dropout Rate	--	High Needs	79.6		
In-School Suspension Rate	0	% African American	3.4		
Out-of-School Suspension Rate	2.9	% Asian	0.5	Student / Teacher Ratio	12.6 to 1
Retention Rate	0.3	% Hispanic	68.4		
Unexcused Absences >9	45.9	% White	24.8		



Appendices



Juntos Podemos | Together We Can

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
Dean Tech						
Bleacher replacement						
Bleachers are original to the building with many worn features and some mechanical difficulties		\$ 87,550				\$ 87,550
Boiler Replacement						\$ -
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
Gym floor replacement						\$ -
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
HVAC rooftop unit replacement						\$ -
Rooftop HVAC units are at the end of useful life and require frequent repairs to keep functioning					\$ 1,545,000	\$ 1,545,000
Interior Stair Tread Replacement						\$ -
Stair treads and risers are original to the building and are worn and in need of replacement.		\$ 72,100				\$ 72,100
Parking lot repaving,						\$ -
Parking lot has numerous potholes and cracks and needs repaving		\$ 123,600				\$ 123,600
Plumbing shut off valve replacement						\$ -
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
Shops LED Lighting upgrade						\$ -
Needed to save 60% compared to the inefficient metal halide bulbs	\$ 206,000					\$ 206,000
Donahue						\$ -
Clock/Phone/Intercom replacement						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 103,000	\$ 103,000
HVAC rooftop unit replacement and conversion to gas add A/C						\$ -
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
Lighting Upgrade						\$ -
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
Replace old wing plumbing fixtures and replace shut						\$ -
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
Roof replacement						\$ -
1989 Addition eligible in 2019	\$ 1,648,000					\$ 1,648,000
Smoke Detector replacement						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 30,900					\$ 30,900
Water heater replacement and conversion to gas fired						\$ -
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
Window replacement						\$ -
Windows in original wing are 46 years old, drafty and energy inefficient		\$ 4,120,000				\$ 4,120,000

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

	2020	2021	2022	2023	2024	Totals
McMahon						\$ -
Ceiling Tile replacement						\$ -
Ceiling tiles are damaged and unsightly		\$ 123,600				\$ 123,600
Classroom door/hardware replacement						\$ -
Classroom doors and hardware are not ADA compliant and need replacement				\$ 82,400		\$ 82,400
Clock/Phone/Intercom replacement						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 92,700	\$ 92,700
Electrical upgrade						\$ -
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
Gym floor replacement						\$ -
Asbestos flooring needs to be removed and replaced with a suitable gym flooring material				\$ 154,500		\$ 154,500
HVAC replacement						\$ -
removal and replacement of steam system with new energy efficient hot water system		\$ 1,442,000				\$ 1,442,000
Lighting Upgrade						\$ -
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.	\$ 82,400					\$ 82,400
Roof replacement						\$ -
Eligible in 2026					\$ 875,500	\$ 875,500
Window replacement						\$ -
Existing windows are drafty, non-operable and energy	\$ 2,163,000					\$ 2,163,000
Morgan						\$ -
HVAC rooftop unit gym, air handler replacement A/C						\$ -
Many rooftop units are original to the building and repair parts are obsolete		\$ 1,751,000				\$ 1,751,000
Lighting Upgrade						\$ -
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.	\$ 133,900					\$ 133,900
Replace gym floor						\$ -
The existing wood flooring has been sanded numerous times and is worn and damaged in numerous areas				\$ 154,500		\$ 154,500
Roof replacement						\$ -
1989 Addition eligible for roof replacement in 2019		\$ 1,545,000				\$ 1,545,000
Smoke Detector replacement						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 25,750					\$ 25,750
Window replacement						\$ -
Summer 2019	\$ 3,605,000					\$ 3,605,000

	2020	2021	2022	2023	2024	Totals
System wide Schools						\$ -
Install Upgrade Servers						\$ -
Ensure servers are up to date for technology	\$ 412,000					\$ 412,000
Replace 1998 Ford Explorer (#16)						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations					\$ 47,316	\$ 47,316
Replace 1998 Intem'l Dump (#12)						\$ -
Truck is at the end of its useful life			\$ 101,391			\$ 101,391
Replace 2002 Ford Escape						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations	\$ 40,556					\$ 40,556
Replace 2004 Ford Explorer (#14)						\$ -
Vehicle is at the end of its useful life and still used for school day to day operations					\$ 43,531	\$ 43,531
Security Cameras	\$ 244,007					\$ 244,007
Sullivan						\$ -
Clock/Phone/Intercom replacement						\$ -
Existing system is antiquated, difficult to repair and in need of replacement.					\$ 103,000	\$ 103,000
Door replacement- interior/exterior						\$ -
Classroom doors and hardware are not ADA compliant and need replacement					\$ 164,800	\$ 164,800
Gym floor replacement						\$ -
Asbestos flooring needs to be removed and replaced with a suitable gym flooring material					\$ 154,500	\$ 154,500
HVAC replacement- classroom univents, A/C chiller addition rooftop unit replacement						\$ -
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
Lighting Upgrade						\$ -
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
Plum bing fixture replacement shut off valve replacement, old/middle wing						\$ -
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
Roof replacement						\$ -
1989 Addition eligible in 2019	\$ 2,575,000					\$ 2,575,000
Smoke Detector replacement						\$ -
Current detectors were installed in 1989 renovation and are in need of replacement	\$ 30,900					\$ 30,900
Window replacement						\$ -
Summer 2019	\$ 6,386,000					\$ 6,386,000
Grand Total	\$23,618,722	\$14,544,513	\$200,157	\$5,224,873	\$7,198,769	\$50,756,705

Holyoke Public Schools

Fiscal Year 2024

Juntos Podemos, Together we can!

