

# SUSTAINABILITY STUDY

**For The Mohawk Trail  
Regional School District  
School Committee**



**Superintendent of Schools:  
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**Submitted by**



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- The following reports were used as references:
  - District Strategic Plan
  - Jetzon Data Report
  - Best Report
  - White Paper Report

## Executive Summary

The District requested that the MARS consulting group collect information about current conditions within the District and prepare estimates and projections in the critical areas of enrollment, fiscal conditions, educational programming and building infrastructure. This information will help inform the development of a long-term sustainability plan.

Our experience at Mohawk Trail was a genuinely positive one. We met dedicated and talented educators, learned about the development of relevant and helpful programs, and toured facilities that reflect investment and excellent maintenance practices. The District has been proactive in identifying potential issues and developing remedies to address them. Mohawk Trail is a good school district and one that very much deserves to be sustained over time. It is a critically important organization for children and families in the member communities.

### Enrollment

The New England School Development Council (NESDEC) completed an enrollment study for the Mohawk Trail District. It provides updated historical and projected data. The District requested that this study be focused on each of Mohawk's schools and the respective communities they serve. A summary report and a report for each school can be accessed through a link in the appendix of this report.

Regarding Buckland Shelburne Elementary School, the population of Shelburne (1,884) has decreased over the last 30 years by 128 people and the population of Buckland (1,816) decreased by 112 people over the same period. The enrollment at the Buckland Shelburne Elementary School is reported to be 247 students in 2023 and is projected to decrease over the next ten years by 63 students which is a 25% change.

The Town of Colrain (1,606) has experienced a 9% decrease in population since 1990 – a decrease of 151 people. The town of Heath is included in this part of the NESDEC study, and an increase of seven people is reported over this time frame. Resulting in a population of 723 people. The Colrain Elementary School enrollment was 96 students in 2013 and is currently 88 students. Over the next ten years the projection calls for an enrollment of 84 students.

The population of towns serving the Sanderson Academy has been stable over time. The Plainfield population (633) has increased since 1990 by sixty-two people and the Ashfield population (1,695) has decreased by 20 people over the same period.

Historically the student enrollment at Sanderson has also been stable since 2012 with a decrease of 7 students over that time frame. Projected enrollment over the next ten years will decrease by 12 students.

The historical enrollment at the Regional School shows a decrease of 44% or 217 students since 2012, with current enrollment at 277 students. The enrollment up to 2033 is projected to be stable with a cumulative increase of 9 students resulting in an enrollment of 286 students. These numbers likely reflect changing patterns in school choice, charter school and vocational/technical school enrollment. While the District has experienced drastic declines in enrollment in previous years, the NESDEC reports indicate that Mohawk Trail will remain a small district with only minor changes in enrollment going forward.

### Facilities

In 2013, the Potomac Group provided the District with detailed assessments of every school building. The member communities and the District have done an excellent job of using these studies as the basis for assembling the Capital Working Group (which includes representatives of the member towns) and planning how to complete necessary maintenance and capital projects. There are individual reports on each school documenting work that has been completed as well as the required funding.

All of the schools are clean and well maintained and at one point or another, have been updated through projects completed with the help of state grants. This is important given that the original construction dates for these schools are often in the 1950's. There is a closing section in the report with comments on the current condition of assets, required maintenance, system deficiencies and current capacity and usage. The MARS group is not reporting on engineering or architectural factors, but the District could contract with such a group if an updated technical report on the schools is deemed necessary. This section of the report also describes several considerations that the District could evaluate should facility consolidation be studied or implemented.

### Finance

The MARS group contracted with the Abrahams Group to report historical financial information and to present a five-year model of future school finance circumstances, budgetary needs of the District and the challenges for member towns. The projection is based on preliminary Ch. 70 numbers for FY '24 and six year historical expenditures and revenues. The model uses foundation enrollment numbers.

Revenue for Mohawk budgets is primarily derived from assessments, and Ch. 70 aid. It is reported that assessments have been stable with the exception of FY '21. Local required contributions are projected to increase over the next four years ranging from 17% to 10%. Hawley and Charlemont required contributions will change minimally. Given enrollment patterns, the District will remain a minimum aid district through the projection period. This represents only a .004% increase, well below inflation. All of the member towns are projected to become “above target share” communities over the projection period. If District expenditures remain constant (as the model has assumed), increases in “above minimum” contributions will be necessary, leading to challenges for member towns approaching their levy limits. The model suggests that revenues will need to increase, or expenditures will need to decrease – or practically speaking, a combination of both will be necessary.

### Education

The report on education was based on a variety of interviews and meetings with: teachers, principals, program directors and central office administrators, and also considers a community survey, and a review of student achievement data. The report is structured according to system inputs and outputs.

District staff and leadership have implemented a new math curriculum and have introduced a new ELA curriculum. At the secondary level, the trail blazer model and the Barr Grant are resulting in positive changes to education in grades 7-12. The District offers social emotional programs to support students and to compensate for social and academic losses during the pandemic. Staff report that there are sufficient resources to address the work in front of them. The facilities are spacious and well maintained, and the level of staffing is adequate. Existing programs and initiatives should be supported over time.

The District offers a wide variety of educational and co-curricular programs for a small rural district. The before and after school programs, the number of advanced courses at the high school, and the athletic activities represent a commendable effort to be viable in the face of enrollment decline. The presence and work of the Mary Lyon Foundation is an excellent part of these efforts. Outgoing students at the secondary level are a concern that was frequently mentioned. The District is aware of this issue and these programs attempt to retain students.

Student achievement according to state data, is more advanced than some neighboring districts but still hovers around state averages. There is on-going work to improve these

results. It is reported that college bound graduates are accepted to a wide range of reputable colleges and universities.

Regarding special education, staff work diligently to comply with the regulatory requirements. Recommendations include a review of paraprofessional staffing, consideration of different scheduling and grouping practices for substantially separate programs and continued efforts to address social emotional learning. The report also recognizes that geographical distances are an ever-present factor for Mohawk Trail.

## Educational Programs

Educational programs are the core of the mission of the public schools; and the ability to maintain and sustain the delivery of educational program is the critical measure of the success of any district. MARS consultants (Jay Barry and George Frost) have interviewed multiple staff members to obtain input and perspectives on current educational programs in order to gain a sense of how these programs blend with the concept of district sustainability. All of the building principals were interviewed (Hayley Gilmore - Buckland-Shelburne Elementary (BSE) Amy Looman - Colrain Central School, Emma Liebowitz - Sanderson Academy and Chris Buckland - Mohawk Trail Regional) as well as Sarah Jetzon, Director of Curriculum and Instruction. In addition, a group interview was conducted with several teachers from the District (Bethany Basal - HS Social Studies, Travis Minnick - Middle School STEM and Reading, Carrie Wroblewski - Grade 1, BSE, Gwennan Ickes - Grade 5, Colrain and Bridget Lilly - Grade 6 Sanderson Academy). Consultants also interviewed Greg Lilly - Athletic Director, Alia Woofenden - Community Engagement and Enrichment Programs Director and Kristen Tillona-Baker, Executive Director of the Mary Lyon Foundation. Further, the Special Education Program was reviewed by another colleague, John Salavardos. The special education report is attached as a separate section of this report. The MARS Group also conducted a comprehensive survey of the educational community (staff, parents, community members, etc.). The results of the survey are included in the Appendix.

The interviews of educational programs were framed along the lines of educational inputs and outputs. Inputs included areas associated with things provided by the District that influence program. For example, facilities, resources, staffing, professional development opportunities and current major program initiatives. The level of community support was also discussed given its importance to educational support felt by district staff. Those interviewed during this phase were also asked to share concerns they had for the District moving forward. Outputs include things that measure the District's success in providing students a solid education. The final segment of the interviews asked staff to share their thoughts and ideas regarding the matter of sustainability.

MTRSD has been proactive regarding the issue of sustainability for a number of years. Earlier reports have been undertaken and have received strong consideration in establishing a strategic perspective in the decision-making process. The Potomac Report from 2013 focused on facilities in the District and has had great influence on capital planning. The Best Report from 2015 produced a final summary of three phases of options to support the District in the future including school closure (Heath

Elementary), altered grade configuration (move Grade 6 to MTR ) and possible further consolidation of Grades K-5 to other sites. The interviews of the past few months have shown that District administrators are thoughtful in continuing these considerations. District administrators and teachers present a committed perspective which focuses on producing a high-quality educational experience for all students; both in the present but also moving forward into the future. Essentially, consultants have developed a respect for how well the District has been administered over time.

While there will be a detailed separate report on Facilities, MARS interviews suggest that the District has given credence to the earlier mentioned reports (Potomac and BEST) and has been thorough in the area of building maintenance and repair. Staff interviews support this view and they feel that current facilities are more than adequate to deliver and support current educational programs. There were some minor points made regarding building needs; the Sanderson Principal noted that there are storage space issues and teachers wished that smaller spaces better suited to small group instruction were available but none of these types of issues detracted from the ability to deliver quality program. BSE has been well maintained but is an older building which is stressed by operating two classes per grade with significant other space needs for Special Education and other programs. The District may need to determine if BSE should be studied for possible improvement projects in the future. On the other hand, the Middle/High School has ample space for all of its current programs and, in fact, has underutilized spaces that will need further thought and consideration in the sustainability options available to the District.

Another area of input relates to the availability of resources to support current programming. Again, all of those interviewed made note that current levels of resources were adequate to support programs. As an example, principals and teachers noted that major curriculum innovations in both Math and ELA have been instituted in recent years. Similarly, both groups commented that new technology devices have been funded and exist in ample numbers to support instructional purposes. Having said that, there were some comments about whether the District could maintain on-going funding capacity with future budgets. As an example, although technology has been supported, there is not enough tech support staff available to meet service needs. MARS will present a report that analyzes the financial outlook for MTRSD as part of our final report to the School Committee.

MARS consultants also asked about perspectives around staffing in the District. A general consensus emerged that the District is well staffed at all levels, preK-12. A similar sense emerged within the Special Education report, particularly relative to the employment and use of paraprofessionals. Mohawk Trail Regional School is currently



staffed with 55 teachers serving the needs of 330 students. Class size at the elementary level routinely falls in the 16 – 20 range while at the single section per grade schools (Colrain Central and Sanderson Academy) it is not unusual to find specific classes with fewer than 10 students at certain grade levels. Staffing in specialist areas (Physical Education, Art and Music) is adequate to meet District needs. The District also utilizes the services of instructional coaches and specialists on staff and they are viewed as performing valuable work for teachers and students in similar fashion. The work of the Director of Curriculum and Instruction is viewed in a positive light.

Administrators described teachers as being collaborators and innovators who are creative in their approach to teaching and learning. Elementary staff have embraced new curriculum in Math (Bridges Program) and more recently ELA. The use of the “Trail Blazer” model for an individualized student approach to learning at Mohawk Trail Regional has led to a number of new innovative programs. The Capstone Project, internships and an advisory program have taken hold and are viewed in a positive light. The Barr Foundation has endowed the Middle/High School with a substantial grant to support these “reimagined learning” efforts. Principals as a group commented that teachers and staff know their students and families and are proactive in meeting student needs.

All groups interviewed expressed that the post pandemic environment has created significant needs in the area of Social/Emotional Learning losses for all students. This is not unusual and has been noticed in schools regionally and across the country. This learning loss was also noted in the Special Education Report. Supporting students in the area of academic loss is a major undertaking in itself which is now impacted by the need for helping students cope and adjust to losses in socialization experiences. This has created a need for more staffing (counselors, psychologists) in the pupil services realm to implement SEL programming. Given that MTR is not alone in these needs, recruitment and hiring in this area is a real challenge.

Community support of education is another critical component or input for educational programs. There has been solid support in the communities for the Regional District budget over the years; and there is a sense of real community support for the schools and staff. There are multiple events and activities that are well supported by parents and others. There is also a feeling that District staff are engaged with and support these activities. Such a high level of community connection and support is not unusual at the elementary grades. As in many districts, the level of parent support at MTRSD diminishes as students advance to the Regional School. There have been a number of attempts to increase the level of parent and community involvement at the secondary

level and it is important to note that the teachers interviewed sensed a great deal of staff support and involvement for these endeavors.

Those interviewed often mentioned that a strong sense of the “grass is greener” exists for many families which needs to be confronted by increased opportunities for community connections to the Middle/High School.

The following is a summary of some earlier points regarding current programs in the District. At the elementary level, new academic programs have been initiated in Math (Bridges) and ELA. The Math program is clearly seen as working for students and has been strongly accepted and supported by staff. It has produced encouraging performance results through internal measures which many believe will soon translate into improved MCAS scores. The ELA program is newer and was described as in transition, but the District is committed to it. Also, Response to Intervention and Second Step have been implemented K-6 and represent programmatic efforts to address the growing concerns about the negative impact of the pandemic on student learning and socialization skills.

The Regional School has developed a number of program initiatives and continues to “make the most out of the least”. The Advisory program is taking root and will hopefully provide more support to all students in the learning process. The 9-12 program has engaged the Trail Blazer concept for students encouraging them to take greater leadership of their own learning and has implemented the Capstone Project and real-world internships to support this. The High School also offers a wide range of AP courses that have produced encouraging results. There is also a move to allow students to challenge themselves by accepting the opportunity to meet “honors level” requirements. The Barr Grant is providing the means to lead to a concept of a redesigned and reimaged High School and supporting the development of greater consistency in teaching methods which will improve instruction. These are large scale efforts that will affect learning, but there have also been smaller steps that may have great impact. For example, the High School is working toward a robust theatre program and has included student involvement that reaches down to Grade 5 students. This may create a greater connection to the secondary level among elementary families and students. In sum, the District has been proactive in the use of program inputs to sustain the student educational experience.

The matter of outputs relates to how successful the District is in producing a strong educational experience for its students. The outcomes are often tied to student performance on standardized tests. Those interviewed noted that district MCAS scores hover around the state average and that this is not where MTRSD should be. Whether

this is an outcome tied to the loss of learning due to the pandemic is unclear but the District has introduced new programs to raise achievement levels. There is a general feeling that MCAS analysis needs to become a more central part of the District culture moving forward with emphasis on a strong push to exceed state averages. On the other hand, HS student performance measures around SAT and AP scores are more solid than MCAS results. College acceptances also suggest that many students have been well served by their educational experiences. Those interviewed felt that the District did a good job with preparing students for the next level but that more could always be done to improve these transitions. Overall, MTRSD fares well when compared to other districts. Nonetheless, there was mention of a sentiment that the “grass is greener” in neighboring districts.

In comparison to the DART districts (districts determined by DESE that are approximately comparable, e.g., size, configuration, etc.), Mohawk student performance on MCAS assessments is comparable. In comparison to statewide MCAS data, Mohawk student performance is just below the state average. In comparison to neighboring districts that receive Mohawk School Choice students, the District scores exceed those of Greenfield and Franklin County Tech. The scores are comparable or somewhat below the test profile for Frontier Regional and the pandemic-related learning loss was more pronounced at Mohawk.

Comparisons to DART districts are similar. MCAS scores for ELA for Grades 3 – 10 are in the upper middle range; but, generally higher in Math. MTRSD does somewhat better when comparing Student Growth Percentiles within the DART grouping with ELA Student Growth Percentiles rates in the upper middle range; however, Math SGP is higher and is actually the top performing district at Grade 10.

In a presentation made to the regional school committee in the fall of 2022, Director of Curriculum and Instruction, Sarah Jetzon focused on high school trends in SAT, Advanced Placement and college acceptances for the graduating class of 2022. The performance in these areas are worthy of note. SAT scores in Reading are close to state average and above the state average in Math. Of equal importance, the results show that scores have recovered to pre-pandemic levels. Most districts (including MTR) showed declines during pandemic-impacted school years. The presentation also noted that MTR offers 13 AP courses to juniors and seniors which result in a student course completion rate of nearly 80% which is above the state average. AP exam scores for MTR students exhibited that 76% of its students scored 3+ which allows them college credit for the coursework.

College acceptance results are also impressive. MTR students were accepted at most major New England state universities (UMaine, URI, UVM, UMass Amherst, Lowell, Dartmouth). Students were also accepted at a number of prestigious colleges and universities such as: Tufts, Clark, Hartwick, Northeastern, Merrimack, WPI, Rochester Institute of Technology, Siena, Clarkson, Colby, Loyola, Pratt Institute, Mt. Holyoke, Dartmouth, Penn State, University of Michigan (a complete list is included in the appendix to this report).

Acknowledging that the District is trying to improve student outcomes, there were concerns expressed by those who were interviewed. All groups shared concerns about the strength of SEL issues; and, in fact, view SEL matters to be a greater need than educational programming. Principals, in particular, see the impact of the pandemic as having significant and palpable negative impact for many, if not most, students. There is a sense that some age groups (e.g., Grade 7) have been most affected. Teachers see that the loss of socialization to be the predominant issue for most students. There is a “good news”/“bad news” element to this. On the one hand, there is great hope that the Advisory Program will help Middle School students adjust but, on the other hand, there are concerns that the loss of ESSR funds may lead to the loss of needed positions (adjustment counselors as an example).

As mentioned earlier, there are concerns about MCAS scores. Results over time are fair to average. Most of those interviewed feel that the District needs to push for higher expectations for all students. There seem to be adequate supports for those students who are struggling and for students enrolled in AP courses and honors opportunities; but, there is real concern that students in the middle range are not being reached. Teachers noted, with emphasis, that more preparation and collaboration time is needed to provide enhanced differentiated instruction and better inclusion models to more effectively engage students in heterogeneously grouped classes. Having said that, teachers also expressed concerns that there have been too many initiatives and that all initiatives cannot be viewed as equal in importance producing “initiative fatigue”. This was coupled with some comments that perhaps the District should focus on a smaller number of high quality priorities rather than trying to do everything for everybody!

One other point that was mentioned by several people relates to the geographic issues within the District. MTRSD is the largest regional school district in the state by area. Distances between home and school and then between schools are significant and create challenges with travel times. The Special Education Report makes a point to mention that travel time between schools poses an issue for specialists who service students in multiple schools. Similarly, student travel time on buses is a major concern. Any discussion of possible options for the District will need to consider travel time.

The final question asked of the groups focused on ideas regarding sustainability for MTR. The responses to this question often centered on keeping more students in the District through high school graduation. The loss of students at the Grade 6 to 7 and Grade 8 to 9 transitions seems to be at the core of the matter. It is a major issue without question; however, it should be noted that even if all departing students remained enrolled in MTRSD (an unlikely scenario), it will still be a small district with a high school of fewer than 300 students. The following summarizes the responses:

- The major point appears to be that to promote sustainability, the attitude that other schools are better places for students needs to be addressed.
- Building relationships between the Middle/High School and K – 6 students and families is at the heart of retaining students. Increased connections in this realm could begin the process to overcome the “grass is greener” feeling. For example, the expansion of the High School musical to include Grade 5 students was mentioned as a step in this direction and there may be others in this strand of activity. Programs and activities associated with the Community Engagement and Enrichment Program office could also be important in this regard.
- Reconsideration of moving Grade 6 to the middle school was seen as a critical step to inject renewed vibrancy into the Regional School. This was a recommendation of the 2015 BEST report and was rejected at the time but this recommendation needs to be reconsidered.
- More and continued focus on creative programs (advisory, internships, dual college credit coursework and relationships with the community college) could create greater appeal for students and families to stay in the District. As noted earlier, MTR has taken many positive steps already!
- Getting the Middle and High School on the same schedule was seen as important. This has been previously discussed but has not been implemented.
- Consideration could be given to do fewer things with excellence as opposed to trying to “do it all” at the High School. Can a high school of fewer than 200 students really be “comprehensive”?

It is important to note that many of the points made previously in this report have been reflected in the current District Strategic Plan. The plan addresses initiatives to expand real-world learning opportunities in growing internship options and through the Trailblazer model to have students become leaders in developing their individual learning. The plan is committed to expanding SEL programs and supports for students as the District emerges from the pandemic. It also focuses on expanding communication and engagement within the communities to gather support for the

district budget and to create long-term sustainability for the regional schools. In sum, the Strategic Plan is aware of the challenges identified during our study and has articulated strategies to address them.

MARS consultants also interviewed those responsible for other programs that are important to the District and provided information that ought to be shared. Conversations with Greg Lilly, Athletic Director, Alia Woofenden, Community Engagement and Enrichment Coordinator and Kristen Tillona-Baker, Executive Director of the Mary Lyon Foundation provided excellent insights into the role of these programs in the health and sustainability of MTRSD. All of the programs are critical to creating connections between students, families and the District.

Mr. Lilly is new to his position but is not new to the District. He is a graduate of MTR and served on the MTRSD School Committee. He has also been very involved in youth programs within the communities serviced by MTRSD. When you visit the Athletics segment of the District website, you are greeted by an impressive listing of sports offered to middle and high school students. Cooperative opportunities (e.g., football is coop with Greenfield) exist as well. Some of the sports have experienced great success; e.g., Alpine and Nordic Ski teams are traditionally quite successful. Some sports have succeeded in attracting strong student participation, for example, Middle School football has had 25 student participants and this fall, the Girls Volleyball team counted 40 MS/HS members; the Cross Country program is historically quite strong. Other sports have not fared so well. The school was unable to field any gender or level of soccer this year; and boys basketball had to suspend its schedule midseason this winter. The Athletic Director understands the impact that athletics can have in a vital school environment and has been working hard to implement some changes that will hopefully bear future success. Mr. Lilly has fostered a philosophy geared to promote participation as its focus. In this regard, he has pushed to build affiliated viable feeder programs in local communities which should grow interest. As examples, this past fall, he supported youth soccer programs in the area, which had 187 participants after school with a Sunday game schedule. Similar efforts have been undertaken in youth basketball and baseball. It is currently a challenge to field a solid athletic program with current numbers of students and will continue to be so; but it does seem that the matter is being addressed.

Alia Woofenden serves as the Community Engagement and Enrichment Program Coordinator for the District. In this light, she has developed and managed summer programs which combine recreational and educational components for elementary and middle school students. The program offers five weeks of programming in one week segments at MTR and has often had waiting lists. School vacation week programs

(February and April) are also offered. In addition, Ms. Woofenden coordinates after-school activities and clubs for upper grade level elementary and middle school students. The program has no operational budget so is dependent on tuition, grants and partnerships with providers. Funding concerns may limit future operation after this coming summer. Before and after-school programs which are focused on childcare are administered at the elementary schools. As noted, students are offered access to enrichment programs after school at MTR. Similar to athletics, this type of program may be viewed as vital to creating long-term connections for families with the District and should be part of those considerations!

Our conversation with Kristen Tillona-Baker of the Mary Lyon Foundation was truly enlightening. MLF has the following vision, “for all students to be ready to learn; to succeed academically, socially, and emotionally; and to thrive in the world”. Much of its work provides relief and support to ease the burdens on families. It does so by providing grocery delivery to 150 people on a regular basis as well as providing clothing in the winter. Many other services are provided as well. The work of MLF stabilizes many families in the district. MLF fosters relationships with school adjustment counselors and has strong partnerships with the schools. Currently, discussion and consideration is occurring around establishing medical and dental services to students using the Middle/High School as a central location. The work of MLF is a critical piece to the sustainability of the District and its communities.

The final section of this report includes basic information regarding MCAS data for Mohawk Trail. The MARS group felt that the District is completely capable of conducting a deep analysis of MCAS scores and there was little need to do so in this report. The charts that follow provide a general overview of test data in comparison to DART districts and, in one instance, neighboring districts.

The first chart compares Mohawk 2022 data to the state.

The second and third charts show 2022 Mohawk MCAS data in comparison to DART districts. The Department of Elementary and Secondary Education estimates that these are similar districts in size.

The fourth chart is a bar graph showing 2022 grade 10 MCAS data in comparison to neighboring districts.

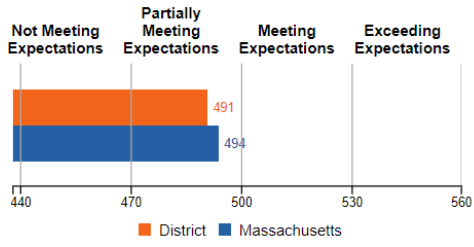
The last two charts show 2022 student growth percentages in comparison to DART districts.

There is some more detailed test data in the appendix of the report.

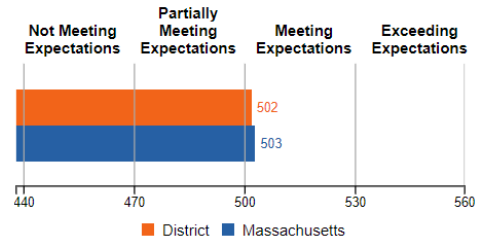
## 2022 Student Achievement

Next Generation MCAS (Average Scaled Score)

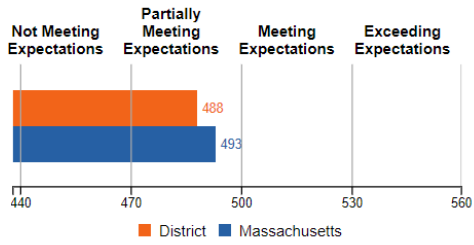
English Language Arts - Grades 3 - 8



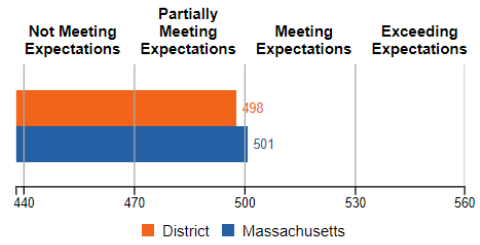
English Language Arts - Grade 10



Mathematics - Grades 3 - 8



Mathematics - Grade 10

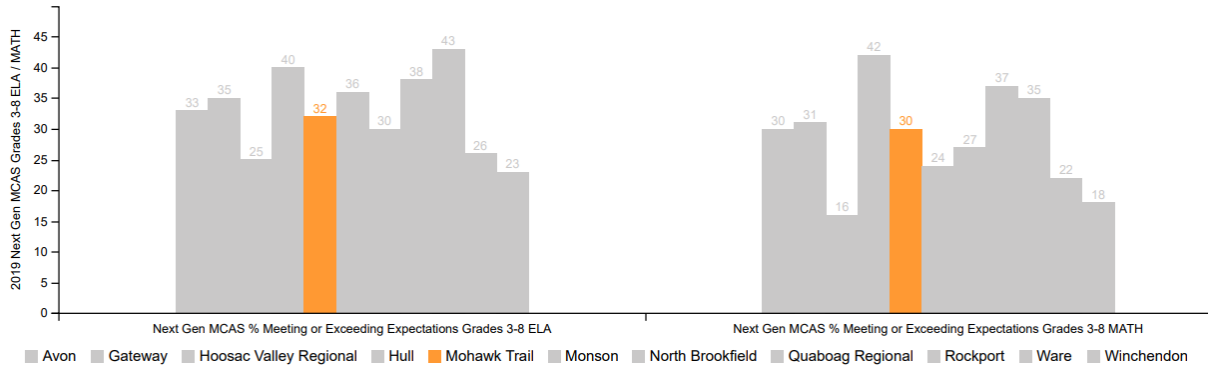




## 2022 MCAS 3-8 DART

3/14/23, 10:46 AM

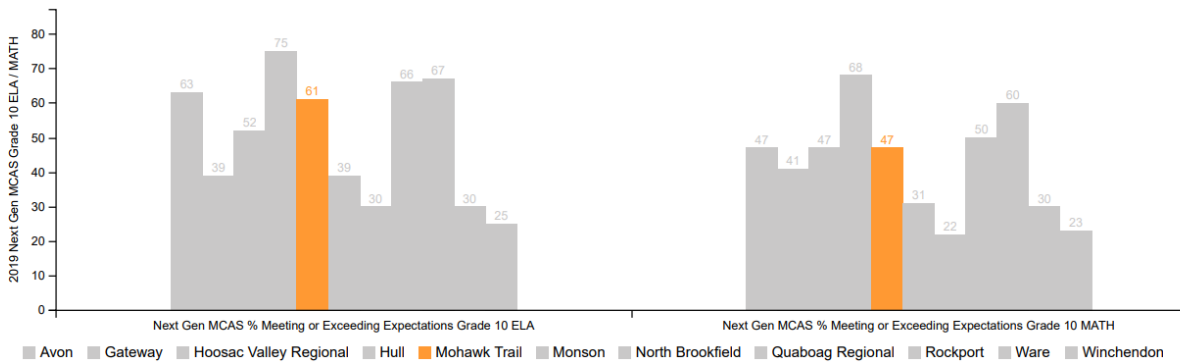
District Analysis and Review Tools (DARTs) - Overview - Mohawk Trail (07170000)



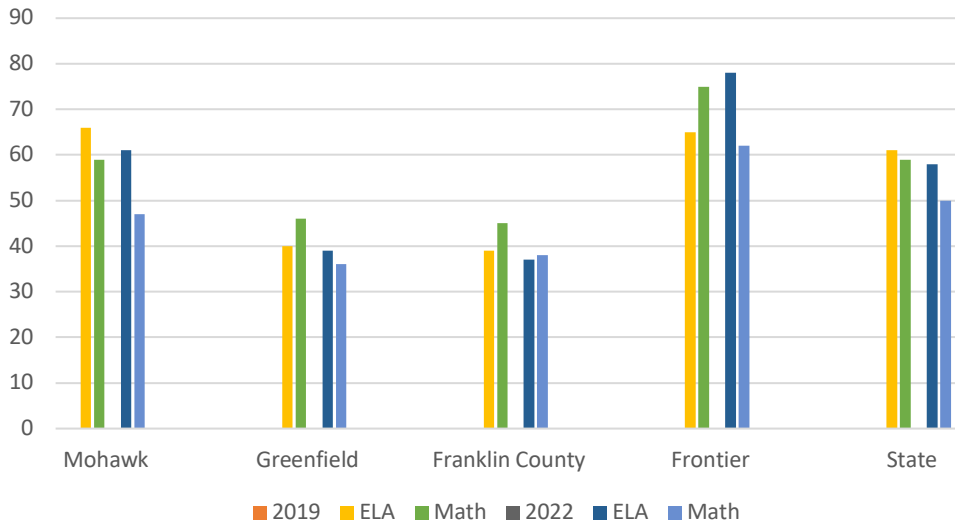
## 2022 MCAS Gr 10 DART

3/14/23, 10:44 AM

District Analysis and Review Tools (DARTs) - Overview - Mohawk Trail (07170000)

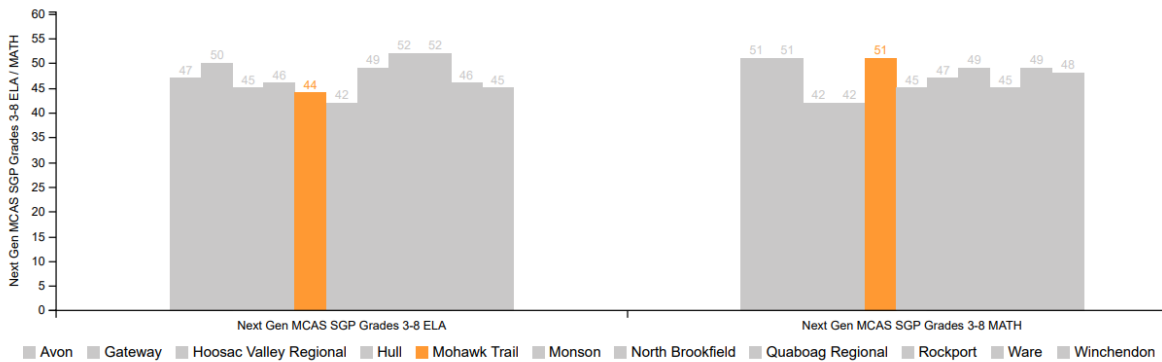


## MCAS Grade 10 Percentages Nearby Schools



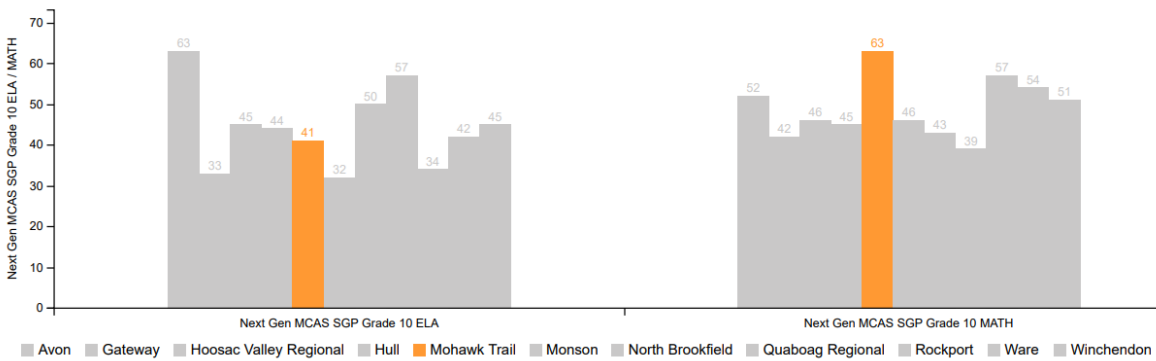
2/24/23, 10:53 AM

District Analysis and Review Tools (DARTs) - Overview - Mohawk Trail (07170000)



2/24/23, 10:54 AM

District Analysis and Review Tools (DARTs) - Overview - Mohawk Trail (07170000)



# **Special Education Review and Report on the Pupil Services Department**

## **The Review**

The Mohawk Regional School District asked for a special education report as part of a larger sustainability study. This process included an initial outreach of data collection followed by an on-site visit with interviews with administration and support staff. The endeavor then succeeded with contacts to the administration to collect additional data, clarify certain information, and verify the content in this report.

Fundamentally, information sought out for this report focused on how the District can sustain the structure of support services that include sub-separate classrooms, supports from outside vendors, and how these services can be maintained in the face of a declining student population in a district with a fairly large geographical footprint and limited regional collaboration. The emphasis on collecting data allowed us to explore alternatives to staffing patterns, balancing caseloads amongst disability types, scheduling inclusion classrooms, and exploring options for condensing services and active school sites in the District.

## **Purpose of the Program Review**

The District faces a declining enrollment, but like other districts is seeing increases in mental health-related services and supports. At the time of this report, the Pupil Services Department provides services to approximately 25% of the District's students.

One of the questions becomes, how does the District continue to support low to high needs students across a regional district without adding additional staff? The goal of the PreK-12 Pupil Services Department report is to explore alternatives in condensing or restructuring services.

## **Procedure and Process**

The process took place over the course of three months from October through December 2022 and yielded some very positive insights into how the Pupil Services Department operates. The following is a list of commendations that we felt were noteworthy to highlight the positive work in the District.

### **Commendations**

- School staff was welcoming and helpful during the review and interview process. Scheduling of meetings was efficient. Information shared was clear and was well organized and detailed. Site information and feedback was very helpful.
- Special thanks to those supporting the process which was helpful to the reviewer. And thank you to Mrs. Leann Loomis and her staff for their assistance compiling program information and for their consideration of pre-visit materials, organization, and for welcoming me during my time in the District.

### **Pre-Visit Questionnaire**

A pre-visit questionnaire was distributed to the District prior to the October 20, 2022 visit. This document looked at two specific areas for data collection. These two primary focus areas included the overall supportive services of the Pupil Services Department and the current structure of educational support programs and services offered throughout the District.

### **Early Observations**

Many other districts in Massachusetts that have high overall numbers of students identified with special needs, but low volumes of low incidence services for special needs populations, are finding it challenging to implement focused initiatives. There have been shifts in the past two decades to provide an increase in specialized service delivery supports to small populations of students. This is based on these low-incidence diagnoses, or the low numbers of students meeting the criteria for a low incidence disability in the district.

Many districts provide disability-related supports through paraprofessionals to students. This forces a reactive solution that addresses an immediate need to get supports put into place rather than building program capacity that serves a wider range of students. This is common and is a result of the pressure of providing immediate services once a student's disability has been identified and the child is found eligible for services.

Districts often fall back to the practice of hiring support staff that are usually minimally trained to deal with the highest needs populations in districts. This practice is very common and sometimes necessary if a district does not have internal capacity to absorb challenging cases and is faced with providing support to a student in a short amount of time. Other options, however, do exist.

The specific problem is that Mohawk Regional relies heavily on support personnel to address student needs. As of the time of my visit in October, MRSD employed over sixty paraprofessional staff. This is a disproportionately large number of paras for a district of approximately 800 students.

### **The Report**

The report that follows attempts to outline the strengths as well as identify those areas where efforts could be made to explore alternate service models and options. For this, the options offered in part later in the report look at the District as a single entity made up of component schools.

The comments focus on some possible options that would require further consideration, discussion, and/or planning. These would be first steps that could be taken at the identified level(s) to work toward a focused restructuring that encourages extensive coordination of grouping and condensing programs by either moving grades into other buildings, and/or closing schools.

### **Essential Questions**

For each of the issues examined, options address the guiding questions, whenever possible, based on our interviews and review of materials. The following questions are considered major deliverables for the report and directly relevant to this independent review of the Pupil Services/Special Education Department.

These guiding questions include the following:

1. What is the extent and structure of supports for students with disabilities in the regional organization?
2. How can we sustain existing special education service with a decreasing population?
3. Are there ways to restructure services to enhance existing programs that can build internal capacity, expand opportunities for regionalization, and positively affect the financial viability of the district?
4. What are the evolving mental health and SEL supports needed in the district?
5. What other information is available that will help the reviewer get to know the District?

## **Procedure and Process**

Information obtained in the site visit and data collection efforts were compared to each other to see if there were trends in services or efforts that may have been explored by the District that had not yielded positive actions. The analysis is not a criticism of efforts or services, but rather a nonjudgmental neutral review that will examine possible options.

## **Regional Collaboration**

We commend the Administrators of the Mohawk Trail Regional School District teams for their dedication, cooperation, and support during this process. The review profiled highly credentialed school administrators and their programs in striving to provide access and modifications to existing programming and the general curriculum to a varied population of students and needs. Regional collaboration through vendors is somewhat limited due to distancing. The largest Collaborative program closest to the district is CES. CES has programs in the western region of Massachusetts, but their services are often a considerable distance away.

Other opportunities for shared regional programming may be possible with other districts in either combining specialized services, classrooms, or schools.

## **Examining the Breakdown of the District**

The Director of Pupil Personnel Services, like many of their counterparts, oversees several functions within the District. These include oversight as the special education director, 504 Coordinator, McKinney-Vento lead, homeschooling coordination, Title IX, facilitating the manifestation determination meetings, overseeing out-of-district placements, leading English Language Learning initiatives, restraint training, and other functions.

### **District Commendations:**

- The District has two team leaders that run IEP meetings and write much of the IEP. They also assist teachers as a general resource. This process allows for greater control over compliance timelines and ensuring consistency between decisions made in IEP meetings and general compliance when writing the IEP document.
- Caseload sizes appear reasonable for special education teachers and related

service providers.

- The Team facilitation process uses a strengths and challenges model in conducting Team meetings, which this writer considers to be a best practice.
- Staff reach out to parents to aid them in navigating the referral process which fosters rapport with families experiencing the special education evaluation process for the first time.
- The Pupil Services Department uses digital supports to track compliance timelines, coordinating efforts with evaluators during the assessment process, and most importantly to track IEPs as they are processed through their system at each building.
- The Team facilitator has created a checklist for staff to use to aid in collecting and addressing compliance data.
- The District utilizes an attorney to aid them in addressing legal issues of a special education nature when needed.
- All staff that were interviewed indicated a desire to work more pro-actively to meet the needs of ALL students.
- Administration in the Pupil Services Department is critically looking at ways to address novel problems in the District such as a dwindling number of students that fall into certain age ranges that attend a significantly separate program (i.e. High School Cognitive classroom supports for 18-22-year-old students).
- Facilities are welcoming, engaging, and appear to have adequate supports and resources to meet the needs of students.
- The HUB program at the elementary level is designed to provide services to students with an Autism Spectrum Disorder (ASD) diagnosis and has resources of BCBA staff to support them.
- As part of the District's improvement plan, they are focusing on reading/ELA for this year.
- The Pupil Personnel Services Director reported that she works with the Curriculum Coordinator and Superintendent on District planning.
- The District has a working relationship with the CES collaborative, but geographically realizes that programs offered by CES are not always within a reasonable travel span.

The Pupil Services Department currently reviews programs in the District on a yearly basis. The Director of Pupil Services meets with the program teams on a yearly basis to examine program needs for the coming year. An option in moving forward is to internally develop a department evaluation process that considers in part, the same type of format as mandated in SE 56 of the Tiered Focused Monitoring (TFM) compliance

guidance requiring that special education programs and services are evaluated every two years.

For the district's benefit, this internal review should include a review of staffing patterns relevant to disability type and trends in determining eligibility and how decisions are made to hire additional staff. A staffing pattern review should be done on a yearly basis to challenge perceptions of staffing patterns. This should be done as part of the budget development process.

### **Determining Eligibility**

School districts are mandated to have a child study process in place to identify students in need, develop plans for addressing their challenges in the general education setting, applying and monitoring those strategies for at least a six-week period, and making course corrections to assure that the students show growth. MTSS and the child study format is not a pre-referral process to special education services. A referral may be one of the outcomes of the child study process but should not be the predetermined outcome.

The District has a child study process that exists at each of their buildings with data collection and review processes in place that looks at the effectiveness of those interventions. However, the District needs to look at how it may be overidentifying students for special needs services as the total number of students on IEPs is approximately a quarter of the entire District population.

Even though other districts have fallen into this same trapping since the pandemic, high numbers in special education should not be considered the norm. As part of the continued effort and review process, the District should be mindful of identifying trends that they may see during the child study process. This continued process could help in identifying areas of need that can be addressed through individual and group professional development opportunities linking the Massachusetts Tiered System of Supports (MTSS) to interventions that should be used in the child study process and found in the District's "District Curriculum Accommodation Plan" (DCAP). The goal here would be to see if the services in the general education setting could reduce the number of referrals to the Pupil Services Department.

Additionally, the District should also examine other data collection and review strategies to consider alternative ways of distributing services throughout the District. These options include the following:



- The District operates a bridge-like program referred to as the Break Program. This program is used as a supportive measure for students before being referred for a special education evaluation. If it is at all possible to expand or create a component of this program to include a higher level of community support so that the program functions as a community support and family center, this may be helpful in aiding families to connect with supports in the community and region that are not available through the District.
- It was reported that the District has a long-term plan for examining SEL in greater depth in the future. Currently, the District uses the Second Step program for K-8, while using an advisory program for grades 9-12. Addressing integrated social emotional learning tenets using the Collaborative for Academic, Social, and Emotional Learning (CASEL) model of Social Emotional Learning (SEL) may be helpful in addressing some of the mental health and behavioral issues sometimes seen in the District. A K-12 program helps to develop and use a consistent curriculum that has a common language across the District.

In reviewing available IEP data, a review was conducted to identify the services utilized to the highest degree in the District outside of the Specific Learning Disabilities (SLD) categories. These groups include the supports provided by some of the related service providers and other professional personnel. Information is taken from data collection within the District. A breakdown and explanation is provided for each disability group identifying the top five most utilized services in the District outside of the SLD category. The four areas are as follows:

## Communication Disability

In reviewing the available data, a student was felt to be receiving speech and language services if the student was identified with a communication disorder. The following table (1.1) represents a review of the total number of students by school that receive speech and language services in the District. The information is then broken down by grade for each building in the same table.

**Communication Table 1.1**

School	Total	PreK	K	1	2	3	4	5	6	7	8	9	10	11	12
MTRS	3									1	2				
Buckland-Shelburne	24	5	4	2	6	4	1	2							
Colrain	6	2	1	1				1	1						
Hawlemont	6	1	1	1	1	1			1						
Sanderson	4				1	1	1	1							

### Commendation:

Early identification of students with language and/or communication disorders can often lead to the student reaching age level expectations within a few years. The table represents an overall trend where a large number of students are identified early on with the total numbers decreasing into the higher grades. This is not an unusual trend in schools. It should be noted that speech and language staff serve students in all of the main school buildings in the district.

### Options:

Even though the trends suggest a decline in services as students get older, the total number of students receiving speech and language support on their service delivery grids equal approximately 21% of the total number of students on IEPs in the district. The table should be viewed with the following qualifiers. It should be noted that PreK can be a multi-year program for students. Considering this, the numbers of active speech and language services stays constant through grade two with one grade acting as an outlier up until grade four when we see numbers decrease more consistently. Secondly, the table does not include the number of students with communication disorders that are served outside of the district.

The department may wish to explore options to integrate speech and language supports into the general education classrooms to enhance the intensity of their model in the

early elementary grades. The end goal of this would be to promote accelerated growth in speech and language development for those students in need of supports prior to grade four.

By report, SLPs work in all PreK classrooms with services being provided as both a push-in or pull-out model. This may be enhanced by considering a distributed practice model. In distributed practice it is important for students with communication disorders to be grouped in classes together. Currently, Buckland-Shelburne Elementary has the HUB program that services a significant number of students with an Autism diagnosis requiring speech and language supports. Even though the structure of the IEP does not support the distributed practice model due to the rigidity of the Service Delivery grid, districts can work around this by placing clear qualifying language within the document in the goals and additional information that allow related service providers flexibility in how they provide services in different settings.

Distributed practice allows related service providers the option of choosing the best environment to work in with students. For instance, if the provider of speech and language services feels that it is best to work with the child individually, they do so. However, if they feel that the child could benefit from working with peers with like disabilities, or typical peers within the classroom, they can make that choice without violating the services outlined in the Service Delivery Grid of the IEP. The goal of this model is to allow professional staff to use their judgment to best determine the setting in which skills are delivered. One of the best ways to implement this is to discuss it within the IEP team meeting process and assure that parents are involved in knowing where services are being provided through service logs sent home to parents with which the District currently engages.

Another option would be to look to combine PreK classrooms in one location. The advantages would be that the related services providers could work with the PreK classes at one site. There might also be a way to condense classes and staff if supports for like purposes are brought closer together. This will aid in decreasing travel time between buildings and allow for related services staff to have a greater number of students in one building that can meet in small groups. If this is a path that the District would consider, they would need to look at how to inform the community of the proposed change and examine how transportation would be addressed.

## Autism Disability

The information in this section correlates with students who have Autism identified as a disability in their IEP. Over the past 20-25 years, districts have seen large increases in the number of students identified with Autism-related diagnoses. Mohawk Regional has seen this shift and currently addresses it within their classroom supports. This shift in services has led to trends in training and hiring staff to work with various Autism-relevant treatment models and supports. Table 1.2 shows a breakdown of that information across the schools in the District. According to a review of electronic databases, approximately 19 students as of December 20, 2022, received a specific Autism-based service according to their IEPs. This is approximately 10% of students on IEPs that receive specialized services. This number is not an issue but can most likely be used to focus on the needs of students and discuss the locations of supports and services in the district.

**Autism Table 1.2**

School	Total	PreK	K	1	2	3	4	5	6	7	8	9	10	11	12
MTRS	7									1	1	1	1		1
Buckland-Shelburne	7	1			1		3	1	1						
Colrain	4	1	1		1				1						
Hawlemont	1		1												
Sanderson	0														

### Commendation:

The District provides support services to students with an Autism-related disability across three elementary schools in the District. The District utilizes a BCBA to aid in addressing support in this area.

### Options:

The numbers of students identified in this disability category is low at two of the elementary schools. This is another area where services might be condensed in location. The District should consider options of centralizing their services for students with an Autism diagnosis into a central location, or collapsing elementary services into a single location.

Also, it may be valuable to have more of a multi-modal focus on significantly separate classes where students with secondary characteristics receive Autism-based supports if they also have cognitive challenges. For students that have both an identified intellectual

disability and an Autism diagnosis/disability, IEP Teams will most likely consider the best environment in which to provide supports. Staff that are versed in behavioral techniques and understand student’s needs that have cognitive challenges will most likely offer a more effective model for learning that benefits the student.

### **Intellectual Disability**

This area looks at identifying students that are determined to have an intellectual disability. This disability category usually focuses on cognitive skills, such as global deficits in an individual’s cognitive profile that usually involves significant deficits in one’s ability to use, retain, and process information. Challenges in this area are usually seen in multiple areas, such as verbal comprehension, visual spatial abilities, short-term memory, processing speed, and organizing information internally. Students in high school may receive services in a significantly separate cognitive-based program until they turn 22 years of age. Table 1.3 shows a breakdown of the number of students across the district that are identified with an intellectual challenge. (Two of the students listed under grade twelve are in the 18-22 age category at this time.)

**Intellectual Table 1.3**

School	Total	PreK	K	1	2	3	4	5	6	7	8	9	10	11	12
MTRS	4									1		1			2
Buckland-Shelburne	0														
Colrain	1								1						
Hawlemont	2					1		1							
Sanderson	0														

**Options:**

The District is currently aware that two of the students identified as having intellectual disabilities are in the 18-22-year-old age range. Being mindful of this as they are, the District will continue to identify needs in the high school program as students move forward, and how it will affect staffing patterns.

## Emotional

Services in this area focus on providing emotional and/or behavioral supports to students. Services can range from counseling support to significantly separate classrooms to accommodate the student's needs. These numbers are based on data as of December 20, 2022.

**Emotional Disability Table 1.4**

School	Total	PreK	K	1	2	3	4	5	6	7	8	9	10	11	12
MTRS	10									2	1		2		5
Buckland-Shelburne	1								1						
Colrain	0														
Hawlemont	0														
Sanderson	0														

### Commendations:

The District utilizes significantly separate programs to support some of their higher needs students but assures that these classrooms operate as partial pull-out programs to keep students as connected as possible to the general education setting depending on their level of services. It should be noted that all students should be considered as general education students. Some of them simply receive services through the Pupil Services Department.

### Options:

Alternative programs that address behavior and emotional issues operate differently than typical classes. Ideally, behavior and emotional issues should be considered as two very different groups but usually have areas of overlap in the classroom. Constraints such as small numbers and not being able to build separate programs often lead to these students utilizing the same classroom space and operating under one model. The District takes active measures to assure that this is not the case and allows for separate space for the needs of each group.

The District does a good job in recognizing these issues. Continued consistency with supports and services will aid in realizing more positive outcomes for students. Continue to be mindful of linking your communication to outpatient supports and that these efforts continue to take place as part of your efforts. Continuation of assuring that any outpatient services are part of the shared communication process between home, school, and outside providers will continue to promote collaboration between

sources. Continued sharing information with parents/guardians so that strategies can be reinforced at home, as well as coordinating and sharing information through the release of information process with outside providers, such as therapists, home support agencies, primary care physicians, etc. can aid in providing coordinated treatment and services to students.

For students that may spend a majority of their time in the program, continue to provide a great deal of modeling that looks at coaching communication and coping skills and how these will be beneficial to students. By report, the District considers and works on using behavior plans that are measurable with goals that are achievable in small increments to aid in reinforcing and coaching alternative behaviors and ways of coping to be effective ways to reinforce progress to students. Continuation of the practice of critically challenging the content of behavior plans to assure that goals and strategies are not out of reach will continue to yield positive results.

### **Interviews with Department Administrators**

Interviews with the Director and other staff were conducted during the review process. The purpose of the interviews was to clarify information obtained during the data collection time period, but also to gain greater understanding of the structure of the current service delivery models, get to know the leadership structure in the district, and also to gather information on changes to District trends in services over the past several years.

In the interviews, trends or themes presented themselves as Administration responded to queries, and data was reviewed, which included the following information.

- The District is currently gearing up for a Tiered Focused Monitoring review (TFM).
- The District has several district-wide staff that include team facilitators, behavioral, and related services providers including a BCBA.
- The District contracts with vendors to supply contracted services for vision as well as orientation and mobility specialists.
- The District has seen an increase in mental health related needs since the pandemic.
- Services through the regional collaborative school has limited space for extended evaluations with some programs being too far in distance from the District.
- Filling some positions has been difficult due to the small pool of applicants.
- Each school reviews the child's connections to the general education setting

before making any changes. The mindset that was shared with me is that the District reinforces that students with disabilities can be integrated into general education settings at all times.

- The District primarily uses the regional Collaborative for part of their out-of-district placed students.
- The District has significantly separate classrooms to accommodate specific disability groups.
- The District has a goal of full inclusion for students. Some families advocate for full program supports throughout the day, but the majority of the inclusion model appropriately operates to integrate students into the traditional general education classroom setting with supports.

### **Conclusion and Final Options**

1. Geographically, the distance between schools within Mohawk Regional varies to a point where staff travel can result in a considerable amount of time between sites. Consolidation of elementary school sites should be discussed as an option moving forward. Travel between schools displaces service hours and limits some of the group work that can be done with students that have like abilities.
2. Build internal capacity to avoid the over usage of paraprofessionals. A district of approximately 800 students that relies on more than 60 paraprofessionals is relying on the least qualified staff to work with the students with the highest needs. An option would be to consider increasing special education teachers in the inclusion model by collapsing some of the paraprofessional positions.
3. Scheduling and grouping should be done at this time for the following year. This should be a yearly practice to group students together who have like disabilities and to balance placement in inclusion supported general education classrooms with special education teacher support.
4. Are there options to work with neighboring districts to combine high level support services? An option to regionalize some efforts by combining significantly separate classrooms between districts may be a way to share financial support and work with larger numbers of students.
5. Another primary option of this report would be to focus on the adoption of an expanded K-12 SEL program. The five tenets of CASEL have been formally recognized in schools since the early 1990s, but the research into SEL as a formal focus started back in the late 1960s. Investing in a student model that promotes responsible decision-making, social awareness, relationship skills, self-awareness and self-management will aid students to self-regulate their behaviors and interact more effectively within the curriculum.



## Infrastructure/Facility Report

### Buckland-Shelburne Elementary School

The school was built in 1958 with additions or renovations in 1965 and 1999. The school has 63,000 square feet. There was also an MSBA green repair project completed in 2011. The school is owned by the Mohawk Trail Regional District and is served by public water supply and public sewer. The school has approximately 29 classrooms and a current enrollment of 278 students. The Potomac Report describes the school as well maintained and in good/fair condition.

All schools were reviewed by the Potomac Group and their capital and maintenance recommendations were used by the Building Committee and the Capital Working Group to plan for funding and completion of recommended corrections. The list below represents the status of that work.

Observation/Issue/Recommended  
Correction

	<b>TYPE</b>	
Replace missing insulation on kitchen hot water circulating pipe	Maintain	Complete
Repair 25% of bituminous sidewalks at front of school	Capital	Complete
Replace concrete sidewalks at front of school	Capital	Complete
Annual maintenance for PVC and standing seam metal roofs	Maintain	ongoing
Repaint Red Shed vertical wood ship lap siding	Maintain	Complete
Repaint exterior doors and frames	Maint	Complete
Repaint exterior windows at mechanical/storage room north end of second addition	Maint	Complete
Repair weather-stripping at exterior double doors	Maint	Complete
Remove, repair, replace exterior sill at door to Art Room	Maint	Complete

Replace carpet in 4 classrooms in second addition	Maint	Not Complete
Replace carpet in library	Capital	Not Complete
Replace damaged 2' x 4' acoustic tile in gymnasium ceiling	Maint	ongoing
Allowance to replace 1' x 1' concealed spline tile	Maint	ongoing
Allowance to replace 2' x 4' concealed spline tile	Maint	ongoing
Replace walk off mats at both connector halls	Maint	Complete
Repair damaged glazed block walls at boys' and girls' rooms in original school	Maint	Complete
Repair gymnasium air handling unit controls to work on thermostat no return air	Maint	Complete
Replace damaged and missing insulation on gymnasium air handling unit ductwork	Maint	Complete
Recommission unit ventilators	Capital	Complete
Allowance to repair/rebuild unit ventilators	Maint	ongoing
Rebuild hot water circulating pump #2	Maint	Complete
Rebuild hot water circulating pump #2	Maint	Complete
Infrared testing for main switch gear and distribution every five years	Maint	Not Complete
Inspect and repair fire saving at electrical and tel/data closets	Maint	Complete
Inspect and repair open boxes and other housekeeping items at electrical and tel/data closets and mechanical spaces	Maint	Complete
Install missing F/A devices, heat & smoke detectors as required	Maint	Complete
Replace fire alarm end devices annually	Maint	Complete
Repaint masonry at original school and first addition & repair damage brick	Capital	Complete
Repairs to low brick pilasters	Capital	Complete
Repairs to tall brick pilasters	Capital	Complete

Recalk brick masonry opening to aluminum window frame	Capital	Complete
Replace fogged IGU's at windows	Capital	Not Complete
Scrape & paint wood fascia board at original school and first addition	Capital	Complete
Clean fascia and soffit at second addition	Maint	some work still needs to be done
Replace condensing unit for AHU #2	Capital	Not Complete
Replace hot water valves	Maint	Not Complete
Rebuild domestic hot water circulating pumps	Maint	Not Complete
Allowance to replace fogged IGU's at windows	?	5.3 Exterior Walls
Replace main central battery on emergency lighting in original school and first addition	Maint	ongoing
Replace plywood skirt and curved fascia board at Band Shell	Maint	Complete
Rebuild hot water circulating pumps #1 and #3	Maint	Complete
Repaint Band Shell Exterior and Interior	Capital	Complete
Replace wood shingle siding at Band Shell	Capital	Complete
Resurface existing parking lots and roadways	Capital	Complete
Replace damaged VCT in main corridor of second addition	Capital	Some
Replace PTEC Units	Capital	?
Replace damaged VCT in kindergarten room of second addition A11 and A13	Capital	Complete
Repaint Library	Maint	ongoing
Remove & replace ACT tile in classrooms in original building and first addition	Capital	Complete
Replace domestic hot water storage tanks	Maint	Complete

Sand and varnish wood closet doors and built-in benches at original school and first addition	Maint	ongoing
Replace Woodshed	Maint	Not Complete
Repaint classroom walls, section (original, first and second addition) per phase	Maint	ongoing
Replace Fire Alarm Battery Back Up	Maint	Complete
Replace oil-fired domestic hot water heater	Maint	Complete
Repair balance of bituminous sidewalks	Capital	Most Completed- outback not completed
Sand & repaint Band Shell floor	Capital	Complete
Preventative maintenance new pavement at parking lots	Maint	ongoing
Replace burners on oil fired boilers	Capital	Waiting for Grant funds
Replace burners on oil fired boilers	Capital	Waiting for Grant funds
Replace toilet exhaust fans	Capital	Not Complete
Commercial Kitchen Equipment - replacement allowance (partial equipment replacement at 5-year increments)	Capital	Not Complete
Replace Johnson Metasys controls	Capital	Complete
Replace domestic hot water mixing valves	Maint	Not Complete
Rebuild gymnasium air handling unit	Maint	Complete
Rebuild McQuay air handling units #1 and #2	Maint	Complete
Replacement of library shading devices	Maint	ongoing
Replacement of classroom shading devices	Maint	ongoing
Replace Fire Alarm system head end	Capital	Complete

As shown in the above spreadsheet, the District has made a conscientious effort over the last ten years to address building needs at the Buckland-Shelburne School. There are many capital and maintenance issues that have been addressed since 2013 and the District and member towns are to be commended for maintaining capital funding and completing this work. If current maintenance practices are continued, this school should be able to support elementary education programs well into the future.

While there are several items that have not been addressed, the Capital Working Group was reported to have made thoughtful decisions about priorities and there is on-going work every year. The capital borrowing for facility improvements is hard evidence of the work that the member towns and the District have devoted to BSE.

In FY '17: \$295,292 of capital borrowing.

In FY '21: \$184,000 of capital borrowing

In FY '22: \$383,850 of capital borrowing

We would add that while the school is in good condition, it is 65 years old and the Potomac Reports are ten years old. The District should continue to monitor this school and consider when an updated technical engineering assessment of Buckland-Shelburne should be conducted.

With the current enrollment, there are between 15 and 20 students per classroom with two classes for each grade. It does not appear that BSE could accommodate additional grade levels although there is space for a small number of additional students, if the additional students are distributed to grade levels with excess capacity so as not to overburden classes where there are already 20 students.

### **Colrain Elementary School**

This school was built in 1952 and an addition/renovation project was completed in 1998. There was also an MSBA Green Repair project that was completed in 2011. The school has 28,000 square feet and is owned by the Town of Colrain. It is served by a private water supply and a private septic system. The school has approximately 12 classrooms, a pre-K classroom, a kindergarten classroom, a library, cafeteria, kitchen, and gym. The school accommodates one classroom for grades pre-K through six with the largest class of 18 students and the smallest with 7 students using FY23 numbers. The Potomac Report states that the school is in good condition as it is reasonably well constructed and well maintained.

After the most recent renovation, the basement was left largely intact and the features of the old cafetorium and kitchen are clearly evident. There is currently an effort to clean out this area for storage of necessary supplies and teaching materials.

The following chart is based on the Potomac Report and overseen by the District indicates recommended capital and maintenance work. It also shows the status of each issue as of this year. The District has conscientiously recorded and monitored the Potomac recommendations and used these recommendations to annually address needed maintenance and upgrades.

Observation/Issue/Recommended Correction	
Repairs to bell tower brick piers	not completed
Cleaning, inspection, and modifications to the dryer piping	completed
Replace first step of 1952 classroom exterior stairs	completed
Recalk aluminum window frame to brick masonry openings	Some completed
Repairs to fascia and repaint	ongoing
Repaint sheds	not completed
Replace window gaskets	completed
Repaint front entry and North entry doors and frames.	completed
Clean EIFS	completed
Repairs to VCT flooring in classrooms	ongoing
Replace carpeting in classrooms	completed
Replace floor at janitor closet with epoxy	not completed
Install double check valve on domestic water supply	completed
Infrared testing for main switchgear and distribution every five years	not completed
Inspect and repair fire saving at electrical and tel/data closets	completed
Inspect and repair open boxes and other housekeeping items at electrical and tel/data closets and mechanical spaces	completed
Provide additional Emergency Lighting	not completed
Provide additional Egress Lighting	not completed
Install missing F/A devices, heat & smoke detectors as required	completed
Replace Fire Alarm devices	completed
Install area drain below valley near library, pipe to drywell	not completed
Increase capacity of area drain at basement door	completed

Install area drain below valley near basement stairs, pipe to daylight	completed
Replace VCT flooring entry corridors and administration area	completed
Rebuild domestic hot water circulating pumps	completed
Replace Emergency Lighting	completed
Replace Egress Lighting	completed
Replace Fire Alarm Battery Back Up	not completed
Caulk joint between sidewalk and building	completed
Rebuild brick landscape walls	some completed
Replace emergency lighting	completed
Repaint Gymnasium walls, up to 9'-0" AFF	not completed
Replace Metal Garage Roof	patched- some completed
Allowance to replace discolored and damaged ceiling tile	completed
Refinish Gymnasium Flooring	completed
Repaint classroom walls, one wing per phase	ongoing
Repaint hallway walls	ongoing
Repaint Cafeteria	ongoing
Re-surface parking lots	completed
Replace Pre-K shed roof	not completed
Replace ball field shed roof	not completed
Replace Fire Alarm system head end	not completed
Recalk expansion joints at exterior brick masonry walls	some completed, FY23 capital project
Commercial Kitchen Equipment - replacement allowance (partial equipment replacement at 5-year increments)	ongoing
Replace VCT flooring at cafeteria	not completed
Preventative maintenance new pavement at parking lots	new parking lots in Aug 2022
Repaint Gymnasium ceiling	not completed
Replacement of classroom shading devices	ongoing
Replacement of library shading devices	ongoing
Replace bituminous and concrete walkways	completed
Allowance for spot repointing throughout exterior	FY23 Capital project

Toilet Partitions

not completed

Replace domestic hot water mixing valves

completed

The capital borrowing for upkeep at Colrain in FY17 was \$42,000 and in FY22 it was \$278,400. This is evidence of the commitment by the town and the District to keep the school in good condition.

Since the closure of the Heath School, the Colrain school is now the smallest school in the District in terms of square footage and enrollment. Currently, four grades have fewer than twelve students. Given the private utilities for the school, the District should continue to monitor these systems as well as keeping track of the underground fuel tank that is located close to the North River. Since 2013, the facility has been well-maintained and the MARS Group also views the school as being in good condition and able to accommodate educational programs for the foreseeable future.

### Sanderson Academy

This school was built in 1997 and serves 126 students in grades Pre-K through 6 from the towns of Ashfield and Plainfield. The school has 37,000 square feet. The school is owned by the District, and the towns of Ashfield and Plainfield pay for capital improvements. The school underwent an MSBA green repair project in 2011. The school has 12 classrooms, 2 kindergarten classrooms and library (with a beautiful view), cafeteria, kitchen, and gym. Given the relatively recent construction date, it is not surprising that the Potomac Group reported that the school is in good condition. A summary of the capital and maintenance work completed since the Potomac Reports were issued is included below.

<u>Observation/Issue/Recommended Correction</u>	
Repair/replace 25% of bituminous walkways at rear	Completed
Repair cast in place concrete stair and railing at Door B3/B4	Completed
Replace missing insulation on kitchen hot water circulating pipe	Completed



Caulk all concrete embedded railings and posts	Completed
Add snow bars and heat tracing at valleys	Completed
Add snow bars at roof above door A4 and seal existing slip joint with Tremco sealant membrane	Completed
Add snow bars and install new gutters at gym shed roofs and roofs over loading dock	Ongoing
Repair and reattached rain leaders at both sides of main entrance	Completed
Annual maintenance for standing seam metal roof	Ongoing
Recalk aluminum window frame to brick masonry openings	Completed
Perform exploratory work at large mulled window openings, including design fees	Completed
Allowance to repair window flashing details at large mulled window openings	Completed
Repaint of exterior wood windows at gable ends and gym	Ongoing
Repaint of exterior doors and frames	Ongoing
Rebuild hot water circulating Pump #2	Completed
Repair air separator valve on expansion tank	Completed
Replace AHU#2 Access Panel	Completed
Repair outside air damper	Completed
Install check valve on domestic water supply	Completed
Re-plumb washing machine at kitchen to indirect waste	Completed
Infrared testing for main switchgear and distribution every five years	Not Completed
Inspect and repair fire saving at electrical and Tel/data closets	Completed
Inspect and repair open boxes and other housekeeping items at electrical and tel/data closets and mechanical spaces	Completed
Install missing F/A devices, heat & smoke detectors as required	Completed
Replace Fire Alarm Devices	Completed
Allowance for spot repointing throughout exterior	Ongoing
Repairs to VCT flooring and sheet flooring	Ongoing
Replace condenser units	Completed
Construct protective shed for condensing units	Not Completed

Replace hot water valves	Completed
Rebuild domestic hot water circulating pumps	Completed
Repair settled bituminous sidewalk at culvert near Door D1	Completed
Replacement of moveable wall partition	Repaired
Replace Fire Alarm Battery Back Up	Completed
Replace oil fired domestic hot water heater	Not Completed
Dig out and replace surface drainage below eaves w/ filter fabric and river washed stone	Not Completed
Allowance to replace discolored and damaged ceiling tile	Ongoing
Repaint Gymnasium walls, up to 7'-0" AFF	Not Completed
Replace oil burners on boilers	Completed
Preventative maintenance at existing pavement at parking lots	Not Completed
Major service to Bioclere sanitary water treatment system	Completed
Refinish Gymnasium Flooring	Ongoing
Stain wood prefabricated shed siding	Ongoing
Repaint Red Shed vertical wood ship lap siding	Ongoing
Repaint vertical wood ship lap siding	Ongoing
Repaint Cafeteria	Not Completed
Repaint hallway walls	Ongoing
Repaint classroom walls, one wing per phase	Ongoing
Replace Fire Alarm system head end	Completed
Replace Barber Coleman controls system	Not Completed
Recalk expansion joints at exterior brick masonry walls	Completed
Replace toilet exhaust fans	In progress
Repair Heat Recovery Units	Ongoing
Repaint Gymnasium completely	Not Completed
Re-surface parking lots	some completed
Commercial Kitchen Equipment - replacement allowance (partial equipment replacement at 5-year increments)	Ongoing
Replace domestic hot water mixing valves	Ongoing

Replace domestic hot water storage tanks  
 Replace damaged sections of concrete walkways  
 Replacement of library shading devices  
 Replacement of classroom shading devices  
 Replace hot water circulating pumps  
 Re-build gymnasium air handling unit  
 Preventative maintenance new pavement at parking lots

Ongoing  
 front completed. Teachers parking lot not completed  
 Ongoing  
 Ongoing  
 Ongoing  
 Completed  
 Not Completed

The capital borrowing for Sanderson improvements in FY16 was \$328,000 and in FY22 was \$318,000. This is evidence of the commitment by Ashfield and Plainfield and the District to keep this school in good condition.

As is the case with the other school facilities in the District, there has been a conscientious effort to follow the Potomac Report and conduct maintenance and capital replacement work on an annual basis. Building systems are approaching their life expectancy (hot water tanks, etc.) and need continued attention, and the private well and on-site septic systems must be carefully monitored. The MARS Group views this school as being in very good condition and able to accommodate educational programs well into the future.

**Mohawk Trail Regional School**

The Mohawk Trail Regional School was built in 1968. A one-story middle school wing was added in 1996 as part of an addition/renovation and there was an MSBA Green Repair project in 2012. In 2013, the authors of the Potomac Reports indicated the building was in good condition. This is a large school building with 147,717 square feet with 45 classrooms and it is owned by the Regional School District. The school accommodates 271 students in grades 7 through 12. The school relies on a private well but is connected to a public sewer system.

As with the other schools in the District, the capital and maintenance recommendations from the Potomac Report have been used to plan the work needed at this building. As can be seen from this spreadsheet, the Mohawk Regional School has received quite a bit of attention and resources since 2013.

Observation/Issue/Recommended Correction	
Caulk concrete sidewalk expansion joints and joint to building	completed
Building A - heated valley & additional snow guards	completed
Repair conduit penetrations into electrical room	completed
Re-set precast concrete sills at building E	completed
Install hurricane clips at brown storage shed	completed
Demolish Red Shed	completed
Replace gymnasium dryer exhaust	completed
Add split cooling unit to electric room next to auditorium.	not completed
Domestic water pump Re-build	completed
Replace diesel tank low level sensor	not completed
Main electrical switchgear room requires two means of egress	grandfathered in so does not need
Inspect and repair fire saving at electrical and tel/data closets	completed
Inspect and repair open boxes and other housekeeping items at electrical and tel/data closets	completed
Firestop penetrations into emergency power closet	completed
Repairs to Brown Shed wiring and outlets to weather protect	completed
Clean out storm drain catch basin sumps annually	ongoing
Replace damaged light poles, add lighting to faculty lot	ongoing
Annual maintenance for roof areas	ongoing
Allowance for brick spall repair and spot pointing	completed

Repairs and painting of stairwell window/door frames.	ongoing
Repaint of exterior doors and frames	ongoing
Repairs to storage shed	ongoing
Repairs to insulated panels	ongoing
Repaint Boiler Room Chimney	not completed
Repaint and repair electrical vault masonry	not completed
Building A - Gymnasium floor scrub and re-coat poly	yearly
Building A - Gymnasium locker room, repairs to gwb ceilings & repaint locker rooms	completed
Building B ceiling tile replacement at library and corridors (select tiles)	completed
Building C ceiling tile replacement (stained tiles)	completed
Building D repairs to toilet room ceilings	completed
Building E ceiling tile replacement (stained tiles)	completed
Repairs to Toilet Room Partitions	ongoing
Heating Hot Water Pump Re-build	completed
Allowance to replace roof top exhaust fans	ongoing
Re-build of Auditorium AHU's	completed
Insulate Exhaust Ductwork in cold attic (toilet rooms)	completed
Install double check valve on well water supply line.	completed
Infrared testing and cleaning for main switchgear and distribution panels	not completed
Allowance for back of house lighting upgrades and motion sensors	not completed
Allowance for replacement of fluorescent ballasts	LED upgrade throughout
Install missing F/A devices, heat & smoke detectors	ongoing

Allowance to replace faulty f/a devices	ongoing
Replace fire alarm batteries	completed
Bi-annual maintenance & replacement of sewer ejector cutters	completed
Maintenance of sewer mains	completed
Replace sewer ejector pump	completed
Caulk metal to metal joints at window system	completed
Building A repairs to toilet room ceramic tile finishes	ongoing
Building A - Repaint Gymnasium walls and ceiling	ongoing
Building B flooring replacement at corridors	ongoing
Building B flooring replacement at library	completed
Re-build auditorium air handling units	completed
Re-surface front parking lot	filled cracks and repaired spots
Clear storm water headwall	ongoing
Caulk vertical expansion joints in brick with bridge caulk joint	completed
Caulk metal to brick joints at buildings A-D (windows and doors)	completed
Re-build Library RTU (a/c)	completed
Re-build Office RTU (a/c and heat))	repaired
Dig out and replace surface drainage below eaves w/ filter fabric and river washed stone, jet perimeter drainage	not completed
Building D flooring replacement at corridors	ongoing
Building D paint corridor walls	ongoing
Building D ceiling tile replacement (stained tiles)	ongoing
Building D paint classrooms	ongoing
Replace kitchen exhaust hoods	ongoing
Re-build Bldg. C RTU (heat only)	completed

Re-build of Gym AHU's	completed
Allowance for replacement of Hot Water Heaters	boys & girls locker-room completed
Caulk brick to metal joints at Building E	completed
Repairs / repaint of rotary building	not completed
Repairs / repaint exterior of maintenance garage	Completed - could be done again
Repaint exterior of pump house	not completed
Building B paint corridor walls	ongoing
Building E repairs to toilet room ceramic tile finishes	ongoing
Replace Building D condenser units	completed
Replace Building B condenser units	completed
Maintenance of storm water mains	ongoing
Tree trimming along power lines	completed
Re-surface rear parking lot	not completed
Building C flooring replacement at corridors	ongoing
Building C paint corridor walls	ongoing
Replace boiler burners	completed
Replace boiler controls	completed
Replace hot water heating valves	completed
Commercial Kitchen Equipment - replacement allowance (partial equipment replacement at 5-year increments)	ongoing
Preventative maintenance new pavement at front lot	FY23 repair
Replacement of toilet partitions	ongoing
Replacement of Gym Lockers	completed
Modernization of elevator	not completed
Replace Fire Alarm system head end	completed
Building E paint corridor walls	ongoing
Replace gymnasium exhaust hoods	completed
Building C flooring replacement at cafeteria	ongoing

Building E flooring replacement at corridors	ongoing
Replace Building E condenser units	not completed
Well head pump replacement	Scheduled for Dec 29, 2022
Preventative maintenance new pavement at faculty lot	not completed
Building B - Re-paint auditorium	ongoing
Re-build fire pump	not completed
Replace Pump House Roof	not completed
Resurface asphalt walkways	some completed
Replace concrete walkways	not completed
Replace Maintenance Garage Roof	ongoing
Building E paint classrooms	ongoing
Replace Rotary Building Roof	not completed
Replacement of classroom shading devices	ongoing
Replace Storage Shed Roof	not completed

The capital borrowing for this school in FY16 was \$250,000 and in FY22 was \$665,000 which is evidence of the commitment of the member towns and the District to take good care of the building.

In addition to this work, solar panels are currently being installed on the south facing sections of the roof. The MARS Group views this facility as being in good condition and able to accommodate educational programs well into the future. This school is another example of the quality work done by the member towns and the Region to keep facilities in very good condition.

Due to changes in enrollment, there is significant excess capacity in this building so the facility could easily accommodate additional students. There are approximately 45 classrooms for 271 students. The student capacity for the building is probably best estimated by the 7-12 enrollment numbers from years prior to enrollment decline. For example, there were 779 students at this school in the 2004/2005 school year and more than 800 in earlier years. Options for moving additional students into this school are described in the conclusions section of this report.



## **Facility Conclusion Statement**

The scope of services calls for the MARS CG to prepare projection estimates in the area of facilities and infrastructure. The MARS group has visited all the schools in the District, met several times with the Facilities Director and reviewed the Potomac Reports which were completed in June of 2013. These reports are comprehensive and continue to be used as a guide for capital and maintenance decisions.

## **Comments**

For the past several years, the member towns and the District have partnered to review capital needs. Further, they have secured the necessary funding to complete capital projects described in the Potomac Reports resulting in four school facilities that are very well maintained. The MARS group commends everyone involved in this process. It is an example of excellent management practices regarding the physical plant.

## **Current Condition of Assets**

As stated in the individual reports on the schools, the current condition of physical assets is very good. We would perhaps qualify this statement with the observation that the Buckland-Shelburne School is the oldest facility in the District. If the District chooses to maintain this school for the children of Buckland and Shelburne, there may be a need within the next decade, to update and modernize this building. This process could begin with an architectural/engineering review of the building. The District could also consider submitting a Statement of Interest to the Massachusetts School Building Authority.

Also, as stated earlier, all of the schools can continue to accommodate educational programming well into the future as long as annual maintenance and capital issues continue to be addressed.

## **Required Maintenance**

The individual school reports indicate a few areas where there is on-going maintenance work in the schools. District staff and member town stakeholders have been conscientious about identifying needed maintenance work and monitoring completion.

## **System Deficiencies**

The MARS CG is not aware of any glaring system deficiencies at this time. The installation of solar panels at the Mohawk Trail Regional School is another example of on-going interest in maintaining the buildings and focusing on energy and financial efficiency.

## **Current Capacity and Usage Review**

### **Buckland Shelburne Elementary School**

Capacity at BSE has varied over time. During the years when Mohawk enrollment was close to 2,000 students, BSE enrolled slightly over 300, but for many years, the enrollment at this school has been approximately 275 students. The school currently has no empty or underutilized spaces. This is also due, in part, to the wider variety of educational services that must be provided at the elementary level. It is our sense that the school is at or near its capacity limit and is well utilized.

### **Colrain Elementary School**

Enrollment at the Colrain Elementary School has been significantly higher than it is today. There were over 200 students attending this school prior to enrollment decline. Now with half that number (104 students), there are underutilized spaces in the school and there are three classes with less than 12 students. The principal and staff use the facility as best they can but there is obviously some degree of excess capacity in the building.

### **Mohawk Trail Regional School**

The Mohawk Trail Regional School previously enrolled over 800 students in grades 7-12 (2004). The current enrollment is 271. Consistent with The BEST Report recommendation, the District is trying to use as much of the school as possible and space has been provided for the Mary Lyon Foundation. Nonetheless, the facility has significant excess capacity due to lower District enrollment. The central office staff are located in offices behind the school office and could be located in empty classrooms with more space. The Middle School wing has a more vibrant atmosphere and appears to be well situated.

## Sanderson Academy

With an enrollment of 126 students this year, the school has three grades with fewer than 12 students which gives rise to the question of whether some grades should be looped or combined, although this has not been implemented. The Pre-K program enrolls 30 students. Enrollment in the elementary schools is completely town-based, but there are Buckland residents who are closer to Sanderson than the school they attend. This could be examined to determine if this was appealing to parents. The relatively recent construction date of the school suggests that this facility should remain in service for the foreseeable future.

### **Assessment of Potential Grade Configuration to Consider**

#### Consideration One

For many reasons (enrollment, retention of students and facility characteristics), the MARS group suggests the District consider the recommendation in The Best Report that the sixth graders from the elementary schools join the Middle School at the Mohawk Regional School. Also, this move should be coordinated with the move to one common schedule for the 6/7-12 school. Further, the District should consider the optimal timing for this change. The primary rationale is the potential for expanding and improving educational and co-curricular programs for sixth grade students. The students located in this school would increase the Middle School enrollment by 66 students. This may also lead to a review of whether the middle school grades would be better located in under-utilized parts of the building.

#### Consideration Two

If the sixth graders from the elementary schools moved to the regional school (Option One), there would be approximately 81 students remaining at the Colrain School. Should Colrain be closed given the small number of attending students? The closure of the Colrain School may impact where Heath students would attend school. Many Heath students currently attend Hawlemont Elementary, due to the timing of the Heath closure and the fact that older siblings were already enrolled at Hawlemont. It is our understanding that the District would like Heath students to eventually attend the Colrain School as families and siblings adjust. If Colrain closes, Hawlemont may be the permanent school of choice for Heath families with elementary age children – with the continued incurrence of School Choice costs to Mohawk Trail Regional

#### Consideration Three A

While the District and the towns have applied time and resources to the Buckland-Shelburne Elementary School, this facility is the oldest and most “out of date” building

in the District. Should the District apply to the Massachusetts School Building Authority for a possible upgrade? This would update the building, but the capital costs incurred by the respective towns would likely be a challenge. The excess capacity in other facilities would also be a factor for the MSBA in determining eligibility for funding.

### Consideration Three B

The District may also want to consider closing BSE and accommodating PreK-5 in one part of the Mohawk Regional School and grades 6 – 12 in another section. If this were brought to fruition, it would need to be evaluated in light of Option Two. Would the Colrain School remain open in this scenario? This would bring more students to the Regional School facility and bring the District closer to educating all students on one campus - with the exception of those attending Sanderson Academy.

If new construction or closure is of interest, the District should communicate directly with the MSBA (Massachusetts School Building Authority) especially if any decision included the school closure. The MSBA is entitled to require repayment if a school with MSBA contributions is closed. Any school closure may also complicate future consideration of a grant from the Authority.

### **NESDEC Enrollment Study/Projections Summary**

[The NESDEC enrollment summary report, as well as, the individual enrollment reports for each school can be found in separate files attached to this report.]

The Mohawk Trail Regional School District has experienced a significant decline in enrollment over the past two decades. This experience reflects what has happened throughout the Commonwealth of Massachusetts over a similar period of time; and mirrors what has clearly occurred in rural communities in western Massachusetts. Because of the substantial impact on MTRSD, we engaged the services of NESDEC (New England School Development Council) to complete an enrollment study including a ten-year enrollment projection for the District and the individual member elementary schools. There is a link to the entire study in the Appendix section of the MARS report. What follows here is a summary version which highlights historical and projected enrollment numbers.

While the NESDEC projection indicates that MTRSD will experience a continued decline in enrollment through 2022-33, the decline is expected to be slight over that period of time. NESDEC is clear to note that projections over the next three-year window are more solid than a ten-year view because the short view is based on students who are already enrolled. In some ways, the NESDEC model suggests that District enrollment has stabilized.

Enrollment levels will continue to pose a challenge for MTRSD as it develops a plan of sustainability moving into the future. As an example, programming for a high school population of 140 students will continue to present significant issues for the District. MTRSD has a current, well-done Strategic Plan that is focused on addressing concerns about sustainability from both an educational and fiscal perspective.

# Mohawk Trail Regional School District

## **FINANCIAL PROJECTIONS**

FY23 – FY27

MARCH 2023

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THE ABRAHAMS GROUP

## Projection Assumptions

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- ❑ Based on:
  - ❑ FY24 Preliminary Chapter 70 numbers (March 2023)  
DESE's simulated Ch 70 Student Opportunities projections
  - ❑ Six-year average FY18 – FY23 historical expenditures & revenues as budgeted
- ❑ Numbers may be off due to rounding

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## District Enrollment Declined 28% during last 13 years

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- Foundation Enrollment:
  - Students that live in the member towns & attend a District public school
  - District financially responsible
- Includes resident students attending District, Choice Out, Charter Out & out-of-district SPED placements

## FY18 - FY23 Expenditures

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- ❑ Annual expenditure increases ranged over five-year period between -0.2% & +4.6%
- ❑ Instructional services & fringe benefits = 74% of FY23 budget

Source: Mohawk Trail Budget

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## Revenues

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Revenues funded substantially by  
Assessments & Chapter 70 funds:

- ❑ 63% assessments
- ❑ 30% Chapter 70
- ❑ 3% Chapter 71
- ❑ 2% tuition
- ❑ 2% miscellaneous

Source: Mohawk Trail Budget

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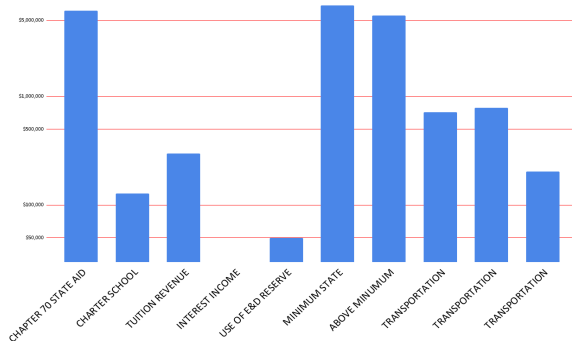
# Assessments

- ❑ Assessments relatively stable over last five years
- ❑ Exception of FY21

Source: Mohawk Trail Budget

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## FY24 Revenues



- ❑ Mohawk Trail revenues are primarily:
  - ❑ Chapter 70 aid
  - ❑ Town assessments
  - ❑ Minimum required district contributions (State)
  - ❑ Above minimum

Source: Mohawk Trail Budget

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# Chapter 70 Projections: Local Required District Contributions

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## Changes: FY23 to FY27

Ashfield = +17.1%

Hawley = + 0.0%

Buckland = +13.7%

Heath = +17.3%

Charlemont = -2.2%

Plainfield = +14.9%

Colrain = +10.1%

Shelburne = +13.6%

Source: Chapter 70 Preliminary Numbers

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## Chapter 70 Projections

- Foundation Budget increased 12.84% FY22 to FY23 after 7% decrease FY21 to FY22 & 3% decrease FY20 to FY21
- Foundation Budget increased 4.3% FY23 to FY24P
- Foundation Enrollment increased 1.47% FY22 to FY23 & 37 enrollment decline FY23 to FY24P (mostly elementary students, notwithstanding NESDEC's projected enrollment increases)
- Foundation Budget growth frozen at 4.03% for each projected fiscal year (consistent with FY24 Foundation Budget growth)
- District projected to remain Minimum Aid district through projection period (projected \$30 per pupil each year)

Source: Chapter 70 Preliminary Numbers

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## Revenue Projections - Summary

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- ❑ Chapter 70 increases projected to be minimum aid at \$23,730 increase each year
- ❑ That represents a 0.004% annual increase (far below inflation)
- ❑ Offsets reduced by ESSER III
- ❑ Other line items including assessments level funded

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## Financial Summary - 1

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- ❑ Analysis presents a financial projection for FY23 – FY27
- ❑ Expenditures projected to increase ~5% annually
- ❑ Chapter 70 projected to provide minimal increased aid - District projected to remain minimum aid district
- ❑ All member towns projected to become above local target share communities during projection period

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## Financial Summary - 2

- ❑ Offsets reduced by ESSER III loss of revenue
- ❑ Annual shortfalls estimated between 5% & 5.5%
- ❑ Expenditures projected to exceed revenues in each year projected - requires increased assessments &/or reduced expenditures
- ❑ Many variables held constant to FY24 & thus actual results will vary - FY24 numbers are preliminary and will change

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### Financial Summary

The Abrahams Group was contracted by MARS Consulting to develop a financial model looking five years forward and estimating the budgetary needs of the District and the income needed to support the District's education budget. The first step was to develop a baseline which encompasses the income and expenses of the District for FY23.

With the baseline established, the projections are based on preliminary Chapter 70 numbers for FY24 and six-year historical expenditures and revenues. The model uses Foundation Enrollment numbers. Revenue for Mohawk budgets is primarily derived from assessments and Ch. 70 aid. Mohawk Trail expenditure annual increases varied over the five-year period between 0.2% - 4.6%. Instructional services and fringe benefits constitute 74% of the FY23 budget.

Local Required Contributions are projected to increase over the next four years ranging from 17% to 10%. Hawley and Charlemont Required Contributions will change minimally. Given enrollment patterns, the District will remain a Minimum Aid District through the projection period. If District expenditures remain constant (as the model has assumed), increases in "Above Minimum" contributions will be necessary, leading to challenges for member towns approaching their levy limits.

### **The major assumptions of this model are:**

- Expenditure projections are based on FY23 as budgeted. Town assessments are based on FY23 as budgeted.
- Chapter 70 numbers are the FY24 preliminary numbers which are based on DESE's seven-year Student Opportunities Act projection and DESE's guidance to project Chapter 70 going forward.
- Minimum required town-wide and District contributions are projected for each member town.
- EQV and income are held at FY24 preliminary numbers.
- MRGFs and Foundation Share allocations are averaged for FY23 and FY24.
- Other variables are held at FY24 levels.

Users of these projections should proceed with caution as actual results will vary. Other revenues are based on FY18 – FY23 averages or are level funded.

Following is a summary of the model projections for Mohawk Trail:

- This analysis presents a financial projection for FY23 - FY27.
- Expenditures are projected to increase between 3% and 6% annually.
- Chapter 70 is projected to provide minimal increased aid.
- The District is projected to remain a Minimum Aid District.
- All towns are projected to become an Above Local Target Share community during the projection period.
- Expenditures are projected to exceed revenues in each of the years projected.
- There are many variables that are held constant to FY24. It is difficult to predict all the changes in financial variables as the model moves forward through the fiscal years.
- The model suggests that revenues will need to increase or expenditures will need to decrease – or practically speaking, a combination of both will be necessary.

## Observations

- I. Mohawk Trail is a good school district that provides quality education to students from eight member towns. The District has been proactive and inclusive regarding the challenges it faces with enrollment, resources and geography. Mohawk Trail is a regional school district that very much deserves to be supported and sustained.
- II. Enrollment has declined significantly in past years but has leveled off and Mohawk will be a small regional district in terms of enrollment in future years.
- III. Enrollment has been impacted by growing trends in school choice and the popularity of vocational education. The District should continue efforts to retain students. The District is currently planning and implementing ways to improve relationships between the elementary schools (and parents) and the Regional School. This work should continue and any progress with retaining secondary level students at Mohawk Trail will help provide a more viable and enjoyable school environment. Consideration of a 6-12 regional school with one schedule could be part of this effort.
- IV. The District and the member towns have done an outstanding job of taking care of the facilities under their ownership and care. All the schools can continue to accommodate educational programs in future years but given enrollment numbers and the need for financial efficiencies, the District could study some form of consolidation.
- V. The expenditure of ESSR funds and non-discretionary cost increases will lead to challenges with future budgets. There will be a need for increased local contributions for the Mohawk budget, given level Ch. 70 aid and reliance on residential property tax revenue.
- VI. In order to achieve the necessary efficiencies that may be required in the future, the member towns and the District should consider updating the regional agreement. Revised provisions might allow the District (in coordination with the towns) to achieve more efficient practices.
- VII. There are many talented and dedicated educators and administrators at Mohawk. The District understands the status of student achievement in the schools and has been proactive and incrementally successful in terms of addressing

challenges. The Barr Grant work at the regional school and the ELA curriculum work at the elementary level are examples of this work. The District is making a remarkable effort to provide a full range of academic and co-curricular opportunities for students at the secondary level.

- VIII. The work of the Athletic Department, the after-school programs and the Mary Lyon Foundation are examples of responsive, high-quality efforts by the District. Expanding the range of services provided by the Mary Lyon Foundation may be worth promoting.
- IX. The District has an excellent reputation for statewide advocacy for rural schools and this work should continue to be a priority. Full regional school transportation reimbursement and increased rural school aid could be significantly beneficial.
- X. Currently, the regional districts of Mohawk Trail and Hawlemont provide K-12 education for the member towns. This district structure appears to be redundant, requiring two separate governance and financial entities. The local view may well be different, but at some point, could all the towns be served by one regional district, and could this be a part of the effort to update the Mohawk regional agreement.