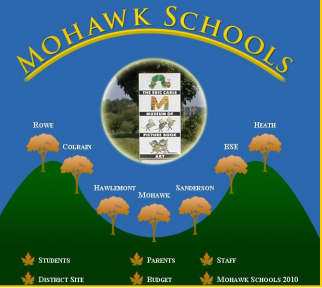


# MOHAWK TRAIL REGIONAL SCHOOL DISTRICT: INTERIM PLANNING REPORT



Presented by:  
**Michael A. Buoniconti**  
Superintendent of Schools  
Mohawk Trail Regional School System  
January 3, 2007

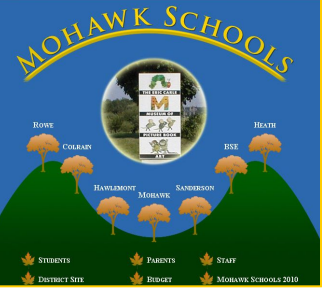




# OVERVIEW



- Financial unsustainability
- Interim Planning Effort
  - Majority Report
  - Minority Report
- Next Steps



# Mohawk Trail Regional School District

# STUDENT CAPACITY BUILD-UP

SCHOOL	CAPACITY
Middle School-High School (7-12)	1,000
Buckland-Shelburne Elementary	460
Sanderson Academy Elementary	240
Colrain Central Elementary	210
Heath Elementary	140
<b>TOTAL CAPACITY</b>	<b>2,050</b>



**BUCKLAND-SHELBURNE ELEMENTARY**  
•Addition/Renovation 2000



**MIDDLE SCHOOL**  
•New construction 1995



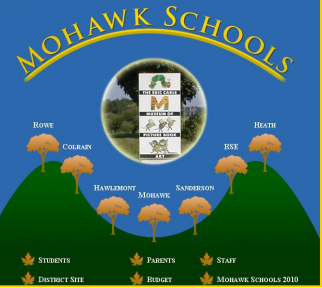
**COLRAIN CENTRAL ELEMENTARY**  
•Addition/Renovation 1998



**SANDERSON ACADEMY ELEMENTARY**  
•New construction 1996



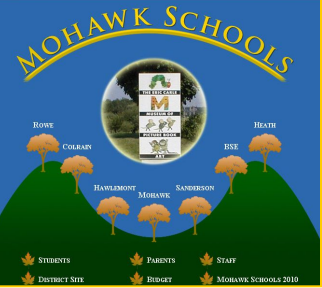
**HEATH ELEMENTARY**  
•New construction 1995



# DECLINING ENROLLMENT - HISTORY

Fiscal Year	Foundation Enrollment	LESS Charter School OUT	LESS Choice OUT	ADD Choice IN	Mohawk Enrollment
2002	1,608	(22)	(37)	60	1,609
2003	1,593	(18)	(38)	63	1,600
2004	1,522	(22)	(47)	76	1,529
2005	1,454	(26)	(63)	80	1,445
2006	1,353	(32)	(55)	93	1,360
2007 est	1,254	(38)	(55)	93	1,254
<b>5-Year Net Change</b>					<b>(355)</b>
<b>5-Year % Change</b>					<b>-22%</b>

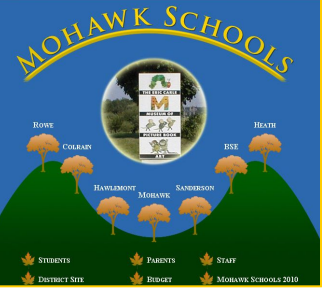
**•22% decline over 5-years from FY02-FY07**



# DECLINING ENROLLMENT - PROJECTION

MOHAWK 5-YEAR ENROLLMENT PROJECTION							
	2007-08	2008-09	2009-10	2010-11	2011-12	Net change	% Change
<b>K</b>	51	64	59	46	45	-32	-42%
<b>1</b>	77	51	64	59	46	-33	-42%
<b>2</b>	79	77	51	64	59	-10	-14%
<b>3</b>	69	79	77	51	64	-20	-24%
<b>4</b>	84	69	79	77	51	-18	-26%
<b>5</b>	69	84	69	79	77	3	4%
<b>6</b>	74	69	84	69	79	-12	-13%
<b>7</b>	114	92	93	108	95	-28	-23%
<b>8</b>	123	114	92	93	108	-4	-4%
<b>9</b>	112	123	114	92	93	-16	-15%
<b>10</b>	109	112	123	114	92	-15	-14%
<b>11</b>	107	109	112	123	114	-12	-10%
<b>12</b>	126	107	109	112	123	-4	-3%
<b>TOTAL</b>	<b>1,194</b>	<b>1,150</b>	<b>1,126</b>	<b>1,087</b>	<b>1,046</b>	<b>(201)</b>	<b>-16%</b>

- Project additional 16% decline over next 5 years
- Project just over 1,000 students in FY12 (50% capacity)

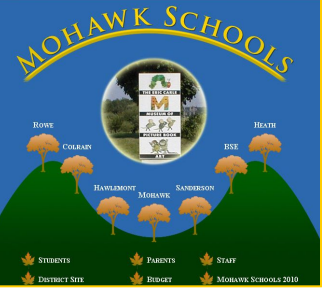


# Mohawk Trail Regional School District

# DISTRICT SCHOOL BUDGET

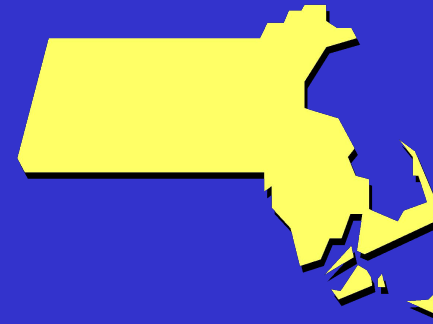
DEPARTMENT	FY04 BUDGET	FY05 BUDGET	FY06 BUDGET	FY07 BUDGET
<b>OPERATING BUDGET</b>				
<b>TOTAL OPERATING BUDGET</b>	\$ 13,813,888	\$ 14,920,026	\$ 15,972,385	\$ 16,818,541
<b>NET CHANGE FROM PRIOR YEAR</b>		\$ 1,106,138	\$ 1,052,359	\$ 846,156
<b>PERCENTAGE CHANGE FROM PRIOR YEAR</b>		8.01%	7.05%	5.30%
<b>CAPITAL BUDGET</b>				
<b>CAPITAL BUDGET</b>	\$ 2,402,762	\$ 2,352,686	\$ 2,325,860	\$ 2,261,831
<b>NET CHANGE FROM PRIOR YEAR</b>		\$ (50,076)	\$ (26,826)	\$ (64,029)
<b>PERCENTAGE CHANGE FROM PRIOR YEAR</b>		-2.08%	-1.14%	-2.75%
<b>TOTAL SCHOOL BUDGET</b>				
<b>TOTAL SCHOOL BUDGET</b>	\$ 16,216,650	\$ 17,272,712	\$ 18,298,245	\$ 19,080,373
<b>NET CHANGE FROM PRIOR YEAR</b>		\$ 1,056,062	\$ 1,025,533	\$ 782,128
<b>PERCENTAGE CHANGE FROM PRIOR YEAR</b>		6.51%	5.94%	4.27%

•Annual increase of approximately \$1 million



# Mohawk Trail Regional School District

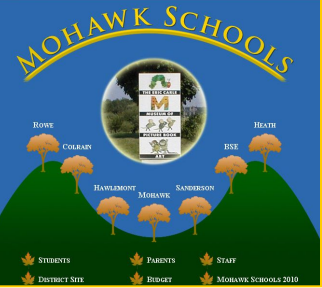
## STATE AID



REVENUE				
CHAPTER 70 STATE AID REVENUE	\$ 5,904,434	\$ 5,904,434	\$ 5,972,084	\$ 6,034,784
CHAPTER 71 TRANSPORTATION REVENUE	\$ 465,126	\$ 540,154	\$ 733,472	\$ 921,252
TOTAL STATE AID	\$ 6,369,560	\$ 6,444,588	\$ 6,705,556	\$ 6,956,036
NET CHANGE FROM PRIOR YEAR		\$ 75,028	\$ 260,968	\$ 250,480
PERCENTAGE CHANGE FROM PRIOR YEAR		1.18%	4.05%	3.74%

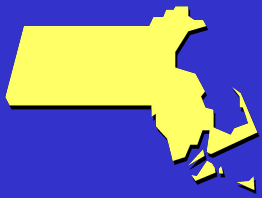
•Annual increase of approximately \$250K





# SHIFTING FINANCIAL BURDEN

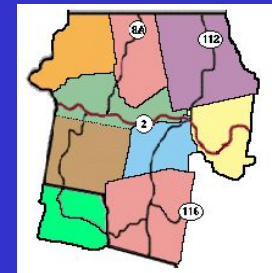
- **Current financial formula**
  - **Approx. \$1 million annual budget increase**
  - **Approx. \$250K annual state aid increase**
  - **Result: Approx. \$750K (75%) of annual increase borne by towns**



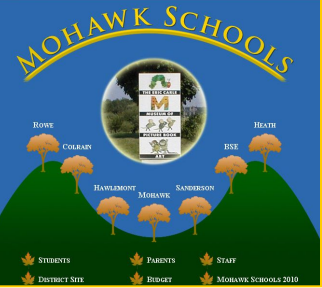
**25%**



**75%**







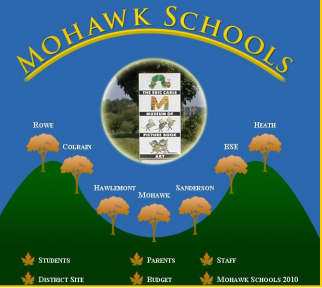
# FINANCIAL UNSUSTAINABILITY

OPERATING	FY04 BUDGET	FY05 BUDGET	FY06 BUDGET	FY07 BUDGET
TOTAL OPERATING BUDGET	\$ 13,813,888	\$ 14,920,026	\$ 15,972,385	\$ 16,818,541
NET CHANGE FROM PRIOR YEAR		\$ 1,106,138	\$ 1,052,359	\$ 846,156
PERCENTAGE CHANGE FROM PRIOR YEAR		8.01%	7.05%	5.30%

TRANSPORTATION	FY04 BUDGET	FY05 BUDGET	FY06 BUDGET	FY07 BUDGET
TRANSPORTATION BUDGET	\$ 1,164,401	\$ 1,225,575	\$ 1,298,417	\$ 1,344,155
NET CHANGE FROM PRIOR YEAR		\$ 61,174	\$ 72,842	\$ 45,738
PERCENTAGE CHANGE FROM PRIOR YEAR		5.25%	5.94%	3.52%

NET SCHOOL SPENDING	FY04 BUDGET	FY05 BUDGET	FY06 BUDGET	FY07 BUDGET
NET SCHOOL SPENDING	\$ 12,649,487	\$ 13,694,451	\$ 14,673,968	\$ 15,474,386
NET SCHOOL SPENDING MINUS REVENUE	\$ 5,258,522	\$ 6,468,389	\$ 7,196,497	\$ 8,033,509
MINIMUM CONTRIBUTION	\$ 5,062,830	\$ 5,276,535	\$ 5,552,500	\$ 5,639,961
<b>ABOVE MINIMUM CONTRIBUTION</b>	<b>\$ 195,692</b>	<b>\$ 1,191,854</b>	<b>\$ 1,643,997</b>	<b>\$ 2,393,548</b>

•Driving unsustainable town assessments



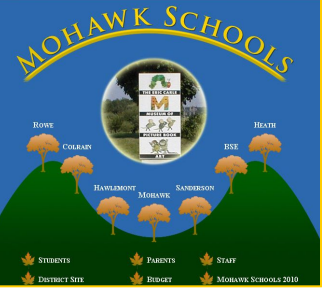
# FINANCIAL UNSUSTAINABILITY

TOWN ASSESSMENTS				
<b>ASHFIELD</b>				
TOTAL ASSESSMENT	\$ 1,380,031	\$ 1,648,886	\$ 1,736,808	\$ 1,839,993
PERCENTAGE CHANGE FROM PRIOR YEAR		19.48%	5.33%	5.94%
<b>BUCKLAND</b>				
TOTAL ASSESSMENT	\$ 1,256,943	\$ 1,473,177	\$ 1,596,248	\$ 1,709,311
PERCENTAGE CHANGE FROM PRIOR YEAR		17.20%	8.35%	7.08%
<b>CHARLEMONT</b>				
TOTAL ASSESSMENT	\$ 446,098	\$ 548,994	\$ 585,784	\$ 661,224
PERCENTAGE CHANGE FROM PRIOR YEAR		23.07%	6.70%	12.88%
<b>COLRAIN</b>				
TOTAL ASSESSMENT	\$ 1,108,449	\$ 1,359,839	\$ 1,479,322	\$ 1,639,829
PERCENTAGE CHANGE FROM PRIOR YEAR		22.68%	8.79%	10.85%
<b>HAWLEY</b>				
TOTAL ASSESSMENT	\$ 112,869	\$ 134,602	\$ 136,794	\$ 139,835
PERCENTAGE CHANGE FROM PRIOR YEAR		19.26%	1.63%	2.22%
<b>HEATH</b>				
TOTAL ASSESSMENT	\$ 536,207	\$ 658,200	\$ 690,654	\$ 722,166
PERCENTAGE CHANGE FROM PRIOR YEAR		22.75%	4.93%	4.56%
<b>PLAINFIELD</b>				
TOTAL ASSESSMENT	\$ 422,704	\$ 488,665	\$ 523,454	\$ 559,663
PERCENTAGE CHANGE FROM PRIOR YEAR		15.60%	7.12%	6.92%
<b>SHELBURNE</b>				
TOTAL ASSESSMENT	\$ 1,316,185	\$ 1,554,578	\$ 1,678,088	\$ 1,825,330
PERCENTAGE CHANGE FROM PRIOR YEAR		18.11%	7.94%	8.77%



• Prop 2<sup>1/2</sup> overrides required in FY07 in 4 larger towns

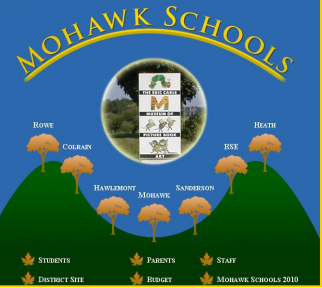




# FY07 TOWN VOTES

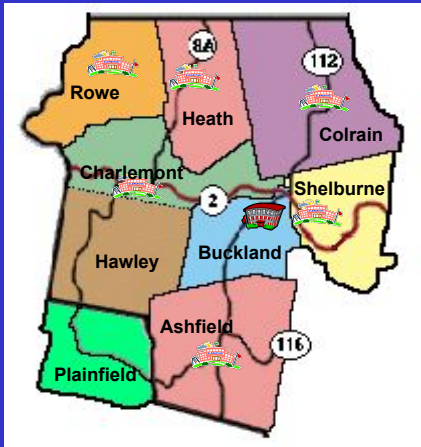
- Needed 10 of 14 potential units to pass school budget
  - Ashfield (2 units)
  - Buckland (2 units)
  - Charlemont (1 unit)
  - Colrain (2 units)
  - Hawley (1 unit)
  - Heath (2 units)
  - Plainfield (2 units)
  - Shelburne (2 units)





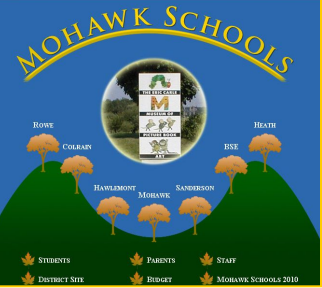
# FY07 TOWN VOTES - continued

- Ashfield (2 units)
  - Yes contingent upon 2 ½ override
  - Override did NOT pass
- Buckland (2 units)
  - Yes contingent upon 2 ½ override
  - Override passed by 4 votes
- Charlemont (1 unit)
  - Yes
- Colrain (2 units)
  - No
- Hawley (1 unit)
  - Yes
- Heath (2 units)
  - Yes
- Plainfield (2 units)
  - Yes
- Shelburne (2 units)
  - Yes contingent upon 2 ½ override
  - Override passed



**VOTE TALLY**

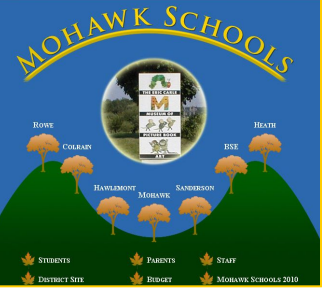
- Units voted: 14
- Units needed: 10
- Units acquired: 10
- Including 2 overrides



# INTRA-DISTRICT EFFORTS



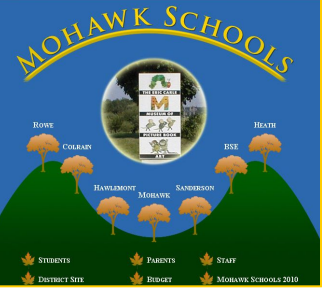
- FY07
- FY08



# FY07 INTRA-DISTRICT EFFORTS

- Focused on process
  - Shifting authority from towns to School Committee to redistribute students
- Town vote results
  - 8 member towns:
    - 6 towns: Yes
    - 2 towns: No
- Outcome: status quo
  - Regional agreement requires unanimous vote



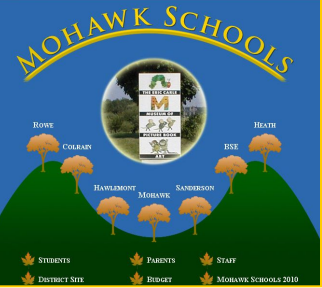


# FY08 INTRA-DISTRICT EFFORTS



- Focused on developing a specific plan
  - Interim Planning Process



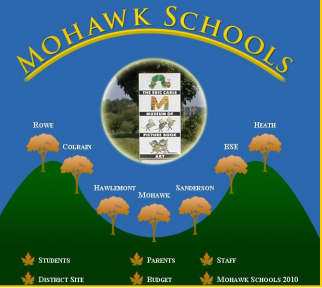


Mohawk Trail Regional School District

# INTERIM PLANNING EFFORT

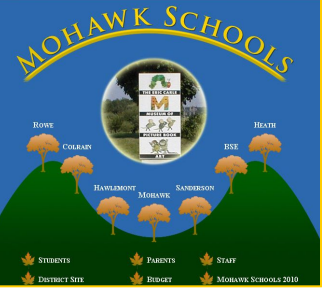
- Authorized by MTRSD School Committee
- Coordinated by Superintendent

• **OBJECTIVE:** to bring community and school committee representatives together to develop and recommend an interim plan to address the worsening school district financial crisis.



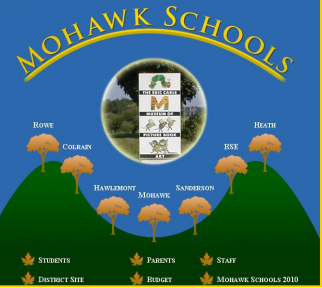
# INTERIM PLANNING STRUCTURE

- **Interim Planning Committee**
  - Comprised of three representatives from each subcommittee
- **Four Subcommittees**
  - Education
  - Budget
  - Transportation
  - Building Use
- **Steering Committee**
  - Facilitated process
  - Included 2 community members and Superintendent



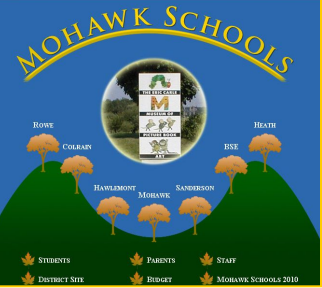
# INTERIM PLANNING GROUND RULES

- **Transparent operations**
  - **Guided by Open Meeting law**
  - **Posted work on website**
- **Decision making**
  - **Consensus first**
  - **If not possible, modified consensus**
    - Majority and minority reports
- **Individual conduct**
  - **Promoted open mindedness, collaboration, and respect**



# INTERIM PLANNING OPERATIONS

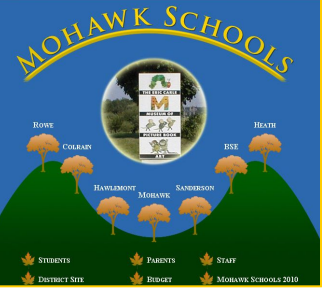
- In-depth work accomplished at the subcommittee level
  - Each subcommittee met 5-10 times
- Decisions and recommendations made at the full committee level
  - The Interim Planning Committee met seven times



# INTERIM PLANNING CALENDAR

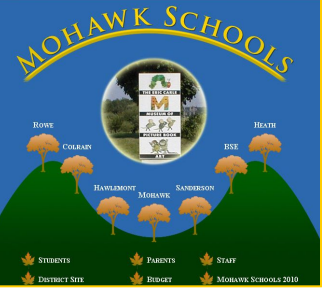
- Five month process
- Began with community brainstorming session on July 26<sup>th</sup>
- Each subcommittee met 5-10 times
  - Progress reports delivered in September
  - Final reports delivered in December
- The full Interim Planning Committee met seven times
  - Final deliberations completed on December 11<sup>th</sup>
  - Final report delivered December 28<sup>th</sup>





# INTERIM PLANNING OPTIONS EXPLORED

- **Seven major options explored**
  - **Strengthen local schools**
    - Enhancement/ Union/ K-8
  - **Regionalization**
    - Elementary/ Middle School/ K-12
  - **Consolidation**
    - Form 2 or more consolidated elementaries

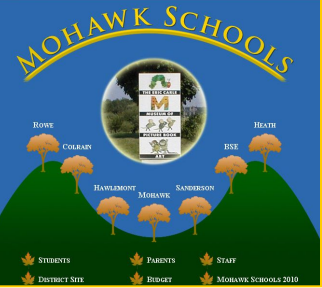


Mohawk Trail Regional School District

# INTERIM PLANNING APPROACH

- **Evaluation methodology**
  - **Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis**





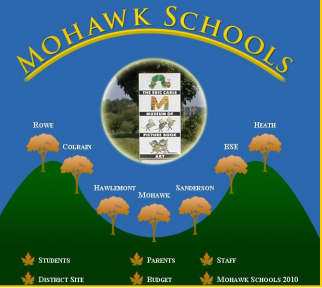
Mohawk Trail Regional School District

# INTERIM PLAN REPORTS

- Majority Report



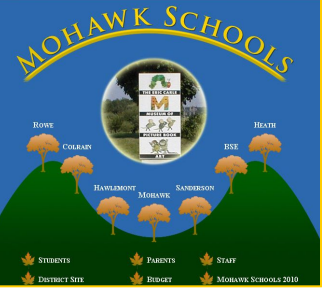
- Minority Report



Mohawk Trail Regional School District

# INTERIM PLAN REPORTS

- **Introductory remarks**
  - **Mrs. Sheila Litchfield**

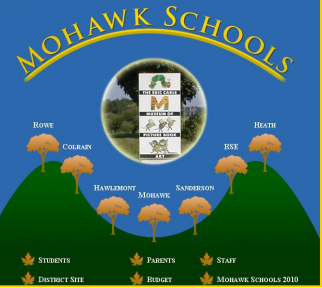


Mohawk Trail Regional School District

# INTERIM PLAN REPORTS

- Majority Report

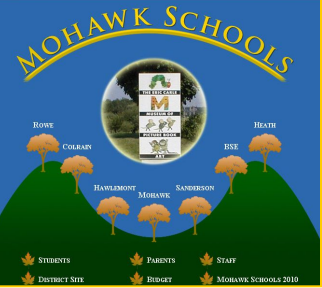




# INTERIM PLANNING MAJORITY REPORT

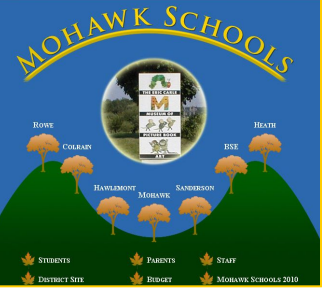
**Survival:** Forced to take drastic steps to preserve quality education without perilously burdening the towns' financial resources

- Financials ultimately drove decision making
  - Projected town assessments key
    - Closure of 3 schools likely to “buy” 2-3 years
    - Closure of 1-2 schools likely to “buy” 1 year



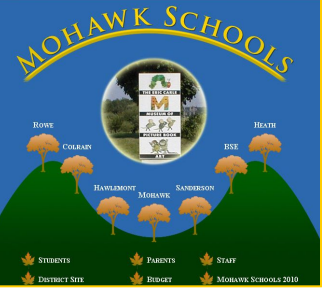
# INTERIM PLANNING MAJORITY REPORT

- **Key recommendations:**
  - **Create regional elementary school by combining four elementaries into one at BSE over three years**
  - **Simultaneously pursue lobbying effort to increase state funding and thus more permanent solution**
  - **Focus on shaping the new regional elementary into a highly desirable school**



# INTERIM PLANNING MAJORITY REPORT

- **Regional Elementary**
  - **Educational highlights**
    - **Smaller class sizes**
      - **K-1: 15 students maximum**
      - **2-4: 20 students maximum**
      - **5-8: 24 students maximum**
      - **9-12: 25 students maximum**
    - **Greater equity and parity**
    - **Stability for students, families, staff**



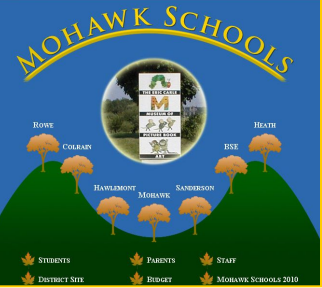
Mohawk Trail Regional School District

# INTERIM PLAN REPORTS

- **Minority Report**
  - **Presented by Pam Porter, School Committee Member, Town of Heath**

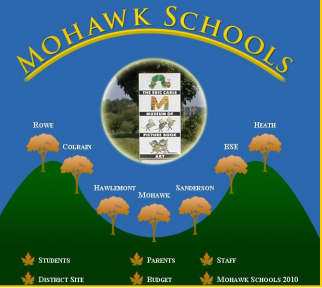






# INTERIM PLANNING MINORITY REPORT

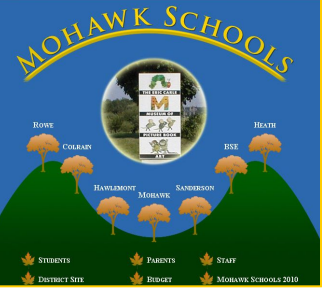
- **Basis for opposing view:**
  - **Work and reports of the Interim Planning Subcommittees**
  - **Information and analysis of Mohawk Superintendent, Michael Buoniconti**
  - **Information and analysis of Ken Rocke, Retired Superintendent of Blue Hills Vocational Technical High School and Heath Resident**



Mohawk Trail Regional School District

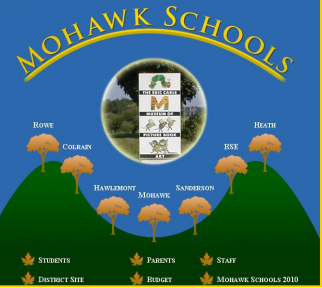
# INTERIM PLANNING MINORITY REPORT

- Four key assertions



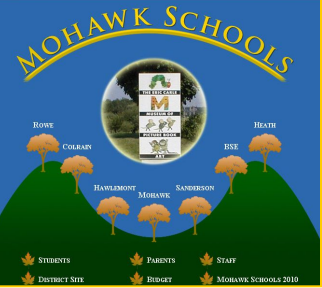
# INTERIM PLANNING MINORITY REPORT

1. Consolidation will not provide the hoped for savings to improve elementary education in our district and will instead result in deterioration of its quality



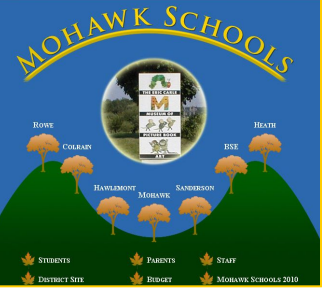
# INTERIM PLANNING MINORITY REPORT

**2. Consolidation will not solve our financial crisis and offers only temporary postponement**



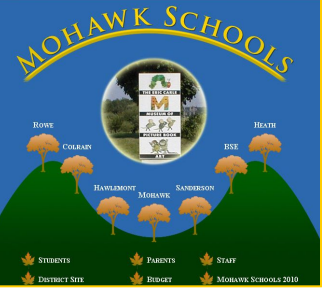
# INTERIM PLANNING MINORITY REPORT

3. This temporary postponement requires radical and permanent changes to our regional agreement and the structure of our district



# INTERIM PLANNING MINORITY REPORT

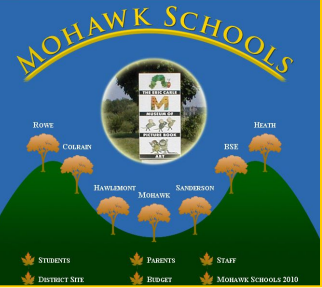
4. Pursuing this plan is a distraction and waste of precious and limited human resources needed to address the real source of our financial problems, the state's failure to fairly fund public education



Mohawk Trail Regional School District

# INTERIM PLANNING

- Superintendent's recommendation

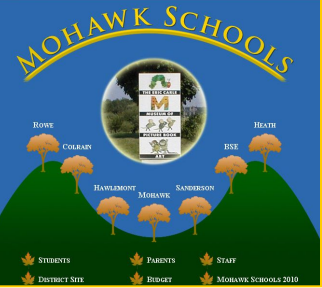


# KEY FINANCIAL DATA – FY08

- Preliminary FY08 Level Services budget
  - \$18.1 M (FY07 \$16.8M)
- Estimated FY08 budget that towns may be able to support
  - \$17.3 M
- Estimated FY08 shortfall
  - \$800K

• Assuming no additional state aid



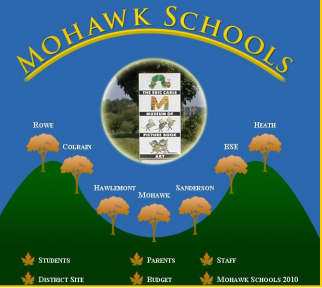


# KEY FINANCIAL DATA – FY08



- If no schools consolidated in FY08
  - Approx. \$800K in reductions required
- If 1 school consolidated in FY08
  - Approx. \$200K savings
  - Approx. \$600K in reductions required
- If 2 schools consolidated in FY08
  - Approx. \$350K savings
  - Approx. \$450K in reductions required

• Assuming no additional state aid



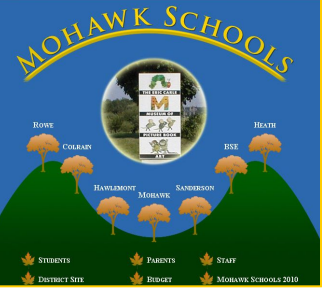
# Mohawk Trail Regional School District SUPERINTENDENT'S RECOMMENDATION

- **Simultaneously**

1. **Pursue legislative effort to increase state aid and more permanent solution**
2. **Prepare to implement Interim Plan beginning in FY08**

• **Assuming no additional state aid**

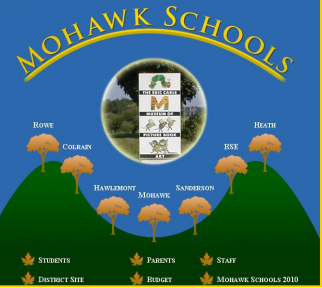
- **If legislative solution is successful**
  - **Reconsider implementation of Interim Plan**
- **If legislative solution falls short**
  - **Implement Interim Plan**
  - **Continue to pursue legislative remedy**



# NEXT STEPS



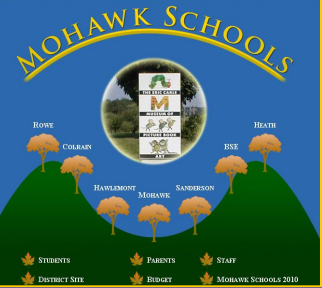
- **January 10<sup>th</sup>**
  - **School Committee to vote Interim Plan**
- **If School Committee votes Yes**
  - **School Committee to determine sequence of school consolidations**
  - **Prepare budget reflecting plan**
  - **Prepare changes to regional agreement**
    - **Special Town Meetings in March**
- **If School Committee votes No**
  - **Traditional budget process**



Mohawk Trail Regional School District

# QUESTIONS?





# MOHAWK TRAIL REGIONAL SCHOOL DISTRICT: PLANNING UPDATE



**Presented by:**  
**Michael A. Buoniconti**  
**Superintendent of Schools**  
**Mohawk Trail Regional School System**  
**January 3, 2007**

