

# HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT



## FY25 BUDGET AND ANNUAL REPORT

As Adopted by the HWRSD School Committee March 7, 2024



## Hamilton-Wenham Regional School District

### *School Committee 2023-2024*

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Amy Kunberger, Vice Chairperson  
David Polito, Secretary  
Julia Campbell, Assistant Secretary  
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Jennifer Carr  
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Superintendent

Vincent Leone  
Assistant Superintendent of Finance & Administration

Stacy Bucyk  
Director of Student Services

Jennifer Clifford  
Director of Teaching & Learning

Thomas F. Geary III  
Director of Maintenance, Facilities & Operations

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## District Mission, Vision, and Core Values

### *HWRSD Mission Statement*

Together we inspire continuous learning in order to lead a purposeful life

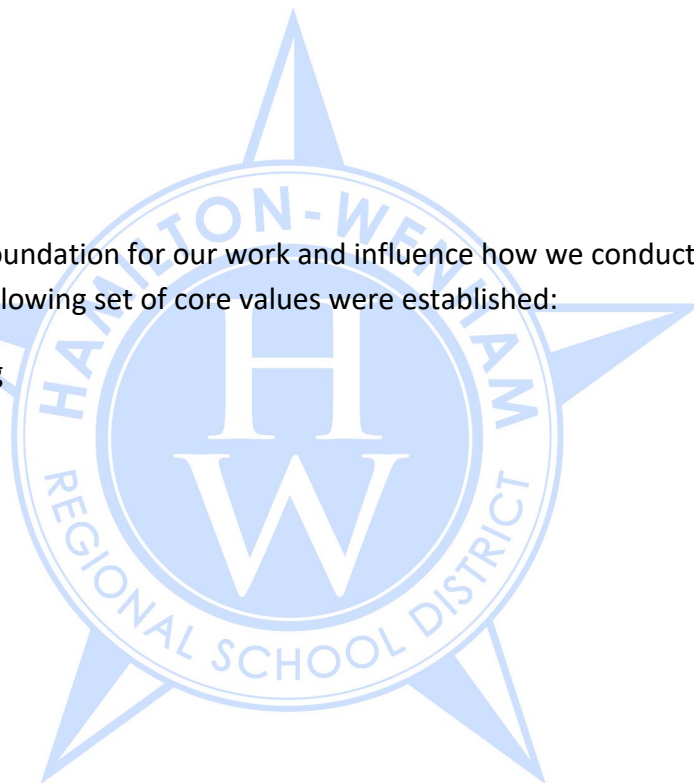
### *HWRSD Vision Statement*

Engage the future with creativity and confidence

### *HWRSD Core Values*

These values provide the foundation for our work and influence how we conduct ourselves and engage with others. The following set of core values were established:

- Passion for Learning
- Belonging
- Inclusivity
- Curiosity
- Partnerships
- Integrity



## HWRSD Portrait of a Graduate



**All graduates of the Hamilton-Wenham Regional School District will be able to independently use their learning to:**

### ***Adapt & Persevere***

Students will work effectively to pursue goals within a climate of diverse views, ambiguity, and changing priorities. They will demonstrate flexibility and resilience while responding productively to feedback, criticism, and even failure.

### ***Communicate***

Students will effectively articulate thoughts, ideas, and feelings using oral, written, and non-verbal skills for a range of purposes and audiences. They will actively listen to others to understand meaning, values, attitudes, and intentions.

### ***Think Critically***

Students will employ a systematic approach to collect, evaluate, analyze, and interpret information to identify creative solutions to complex problems. They will apply unbiased, evidence-based thinking that demonstrates a global perspective and consideration for the impact on others.

### ***Empathize***

Students will demonstrate awareness, sensitivity, concern, and respect for the culture, experiences, feelings, and opinions of all individuals. They will seek to understand and value others' life stories to make meaningful connections.

### ***Collaborate***

Students will leverage the strengths of all to achieve collective outcomes. They will elicit diverse perspectives and contributions to enrich the learning of both themselves and others.

### ***Learn for Life***

Students will embrace curiosity, maximize opportunities to engage diverse perspectives and new insights, and seek appropriate resources to develop confidence, a positive attitude, and enduring beliefs about learning.

## **Introduction**

*Message from the Superintendent of the Hamilton-Wenham Regional School District*

*Message from the Chair of the Hamilton-Wenham Regional School Committee*

*FY25 Budget Development Calendar*



## *Message from the Superintendent of the Hamilton-Wenham Regional School District*

Dear Hamilton and Wenham Community Members,

I am honored to introduce the Hamilton-Wenham Regional School District's (HWRSD) Fiscal Year 2025 (FY25) Budget and Annual Report. The FY25 budget planning process began in September with the year-long budget calendar development. The process of designing the school department budget began in October of 2023 with individual meetings with school and district level leadership, several meetings with town select boards and financial committees, and will conclude at Hamilton and Wenham's Town Meetings on April 6, 2024. This learner-centered budget is focused on supporting progress toward rigorous and relevant learning for all students. Also notable is a reduction of 6.47 FTE positions across the district.

Due to the continued inability to fill vacant positions throughout the 22-23 school year alone, there were approximately 1.5 million dollars in unspent budgeted salary expenditures left at the end of the year. The school committee has determined the best use of all excess funds would be to fund the stabilization fund with \$494,622, add an additional \$494,623 to our currently scheduled contribution to the District's OPEB Trust Fund, \$315,000 for Smartboard replacement (technology), \$225,000 for needed repairs throughout the District and return \$773,064 to the towns in the form of a reduced FY25 assessment.

The goals of this budget include our attempts to continue to focus on literacy and literacy interventions at the K-5 level, to continue work to reduce unused positions across the district, to continue to update and upgrade technology, to adopt and implement a quality math curricula Districtwide.

The FY25 HWRSD Total Expenditures Budget is \$46,636,014, which is an increase of \$1,968,243 or 4.41% over the FY24 approved Total Expenditures Budget. The Total Expenditures Budget includes a General Operating Expense (before offsets) amount of \$44,569,320, which is an increase of \$497,976 over FY24 (1.13%), and includes a Debt Service Expense Budget of \$2,066,694, which is an increase of \$1,470,267 from FY24 (246.51%). This increase is primarily due to the \$1,435,169 payment for the Athletic Facility Improvement Project which represents the first payment for this project.

For FY25, the HWRSD's General Operating Expense Budget provides for a continuation of the services and programs offered in FY24, both budgeted and unbudgeted. The main drivers of increased costs in the budget include one unusual increase to non-salary costs of \$43,189 for athletics to move teams offsite due to the field construction.

The Hamilton-Wenham Regional School District continues to rely heavily on local revenues as its primary source of funding. State Education Aid and other revenue sources are anticipated to total \$9,305,386 for FY25, which is a decrease of \$494,534 (5.04%) from FY24. After subtracting the outside revenue sources, the Net Operating Assessment to the Towns of Hamilton and Wenham is \$35,263,935 which is an increase of 2.9% from FY24. This amount is apportioned to each town through the formula outlined in the HWRSD's Regional Agreement. For FY25, Hamilton's share of the assessment is \$23,376,462 which is an increase of \$681,925 (3.0%) over FY24, and Wenham's share of the assessment is \$11,887,472 an increase of \$310,585 (2.68%) over FY24.

We have devoted countless hours to thoughtfully preparing a budget that is fiscally responsible, credible, and learner centered. We intentionally work directly with staff and elected officials from Hamilton and Wenham to understand



the unique challenges our community faces in finding a balance between what we need to support education and each town's financial reality.

I hope you continue to stay engaged in the discussions about our schools and look forward to seeing you at your respective Town Meetings on April 6, 2024.

Respectfully,

Eric Tracy  
Superintendent of Schools



## *Message from the Chair of the Hamilton-Wenham Regional School Committee*

To the Citizens of Hamilton and Wenham,

This year, two significant projects in the District have focused on improving the educational learning environment for our students.

The Athletic Facilities Improvement project was approved by the citizens at town meetings and at the ballot box. The project is currently being put out to bid and we anticipate breaking ground this spring, weather permitting.

Hamilton-Wenham is in the feasibility phase of the Elementary School Building Project. Working with the MSBA, the District has created the School Building Committee, and hired PMA Consulting as the Owner's Project Manager and JCJ Architecture as the architect for the project. The superintendent, facilities director and members of the team have committed themselves to public outreach and community input. They have been getting the word out at community events, board meetings, community listening sessions and presentations. We anticipate having recommendations on preferred project options this spring. The next step will be the schematic design portion of the process.

The FY25 budget is fiscally responsible. The School Committee and the District have worked with both town Select Boards and both town FinComs to increase transparency and two-way communication throughout the budget process. Quintuple board meetings and Board Chair meetings provide opportunities for all to examine nuanced budget challenges, ask questions and express concerns.

The proposed FY25 operating budget increase is 1.13%. This represents the lowest operating increase in over 10 years. This budget strategically organizes staffing to meet the needs of all students while increasing efficiency.

The biggest driver of the overall budget increase is in debt, mainly related to the two important capital improvement projects, the Athletic Facilities Improvement Project and the Elementary School Building Project. These capital projects will improve the quality of education in our district for the long-term and serve our students for many years to come.

This budget continues to support future fiscal responsibility by adding a total of \$744,622 to the OPEB trust fund in order to continue to meet our responsibilities to our retirees. Additionally, we have offset future costs to Capital Improvement Projects by adding \$494,622 to the capital stabilization fund.

This budget supports not only the students of today but also, future students who have yet to enter our schools or even yet to be born. Predicting student population numbers in the years to come is difficult. Recent enrollment shifts have shown declining enrollment at the upper levels and increasing enrollment at the elementary levels. Our current elementary school population is the highest it has been in over 10 years.

I am grateful for the level of dedication, support, and community involvement in Hamilton and Wenham. It is an honor to serve on the Hamilton-Wenham School Committee and to provide high-quality educational opportunities for all students.

Sincerely,

Dana Allara  
Chair, Hamilton-Wenham Regional School Committee

## FY25 Budget Development Calendar

Date	Milestone
Wednesday, September 13, 2023	Capital Planning/Finance Subcommittee Meeting (4:00-5:30)
Thursday, September 21, 2023	Distribution of the Draft FY25 Budget Calendar
Monday, September 25, 2023	First FY25 Budget Meeting 10:00 - 11:30 (Super., Assist. Super., Town Man./Adm.)
Wednesday, October 4, 2023	First Quintuple-Board Chairs Meeting 4:00-5:30 (Chairs Only - H/W BOS/Fin. Com. & SC/CFSC)
Thursday, October 5, 2023	Distribution of the Final FY25 Budget Calendar
Monday, October 16, 2023	FY25 Budget Process Roll Out to Leadership Team
Wednesday, October 18, 2023	Capital Planning/Finance Subcommittee Meeting (3:30-4:30)
Monday, October 16, 2023 -	Leadership Team Develops Building Based Level Service Budget
Friday, October 27, 2023	
Friday, October 27, 2023	District submits FY23 E&D to MA DOR for Certification
Monday, October 30, 2023 -	One-on-One Level Services Assessment and Proposals by Responsibility Center (Principals & Hiring Managers to Super. & Assist. Super.)
Thursday, November 9, 2023	
Tuesday, November 7, 2023	Distribution of Resident Enrollment Data to Towns
Wednesday, November 8, 2023	Budget 101 Session 4:00 - 5:30
Thursday, November 16, 2023	Capital Planning/Finance Subcommittee Meeting (6:00-7:00) FY25 Capital Budget Recommendation, and FY25 Preliminary Budget (Super. to School Committee)
Monday, November 20, 2023	Second Quintuple-Board Chairs Meeting 4:00-5:30 (Chairs Only - H/W BOS/Fin. Com. & SC/CFSC)
Monday, November 27, 2023	Second FY25 Budget Meeting 9:00 - 10:30 (Super., Assist. Super., Town Man./Adm. & Fin. Dir.)
Wednesday, November 29, 2023	First Quintuple-Board Meeting 6:30-8:30 (All Members)
Wednesday, December 6, 2023	FY25 Budget Review School Committee Meeting (5 Principals to School Committee)
Wednesday, December 20, 2023	Capital Planning/Finance Subcommittee Meeting (3:30-5:00)
Thursday, December 21, 2023	FY25 Budget Review School Committee Meeting (Athletics, IT, FMO, to School Committee)
<b>Thursday, January 4, 2024</b>	FY25 Budget Review School Committee Meeting (Student Services, T&L, & Central Office to School Committee) SC Approves Superintendent TENTATIVE FY25 Budget Proposal
Monday, January 8, 2024	Assist. Super. delivers adopted Tentative FY25 Budget to Towns
Wednesday, January 10, 2024	Third Quintuple-Board Chairs Meeting 4:00-5:30 (Chairs Only - H/W BOS/Fin. Com. & SC/CFSC) SC advertises FY25 Budget Public Hearing #1 & #2
Wednesday, January 17, 2024	Capital Planning/Finance Subcommittee Meeting (3:30-5:00)
<b>Thursday, January 18, 2024</b>	SC holds FY25 Budget Public Hearing #1 Presentation/Review of any additional budget items requested by School Committee members
Tuesday, January 30, 2024	Second Quintuple-Board Meeting 6:30-8:30 (All Members)
Thursday, February 1, 2024	Presentation/Review of any additional budget items requested by School Committee members
<b>Thursday, February 8, 2024 off cycle week</b>	SC holds FY25 Budget Public Hearing #2 SC Adopts Final FY25 Budget
Monday, February 12, 2024	Assist. Super. delivers adopted Final FY25 Budget to Towns
Thursday, February 15, 2024	Backup Date for Final FY25 Budget Vote
<b>Saturday, April 6, 2024</b>	Annual Town Meeting

**Fiscal Year 2025 Operating Budget**

*Net Operating Budget Calculation*

*Operating Expenditures by DESE Categories*

*Operating Expenditures by School Site*

*Summary of Changes to FY25 Operating Budget*



## *Net Operating Budget Calculation*

The tables to follow summarize and calculate the assessment to each of our two member towns. The total FY25 Operating Expense Budget is represented on the top line as \$44.6M. The breakdown of the \$44.6M is shown throughout the budget book, per line item, and is broken out into 12 locations and/or categories – the 5 individual schools, Athletics, Central Office/District Wide Programs, District Maintenance, Fringe Benefits, and other Fixed Charges, Fixed Assets, Special Education, and Technology.

Once total operating expenses are determined, we remove all revenues that are generated from our operations – for example, Preschool Tuition payments received, or revenues generated from the rental of our facilities during the year. FY25's total operating offsets are budgeted as \$2.8M, an increase of \$206K when compared to the prior year. Most of this increase can be attributed to the Special Education Circuit Breaker reimbursement.

Next, we remove our reoccurring revenue funding sources. These consist of monies we receive from the state under the Chapter 70 formula or interest we receive from the bank. Our FY25 total operating funding sources totaled \$6.5M and have decreased by \$(700)K, or (9.78)% over the prior year. The main cause of this reduction is the reduction of \$(870)K from one-time prior year Excess and Deficiency funds.

The remaining amount, \$35.3M is what has become known as our “Net Operating Budget”. This amount represents the total assessment and is funded by the individual member towns. The Net Operating Budget has increased \$993K, or 2.9%, year over year. To determine the split between Hamilton and Wenham we look to our Regional Agreement. The Agreement stipulates that we take a snapshot of our enrollment on October 1<sup>st</sup>, determine the number of students residing in each of the two towns, and calculate that as a percentage of the total enrollment for each town. We take this data for the prior three years and come up with an average to apply to the \$35.3M net operating budget. The result for this budget cycle showed a shift towards Hamilton of 0.07% and away from Wenham (0.07)%. The percentage split for FY25 is 66.29% Hamilton and 33.71% Wenham. Hamilton is seeing an overall year-over-year increase of 3.0%, or \$681,925, to their net operating assessment, while Wenham is seeing an increase of 2.68%, or \$310,585. The reason one community is realizing a larger increase can be attributed to the change in student enrollment and the shift of the student population toward Hamilton.



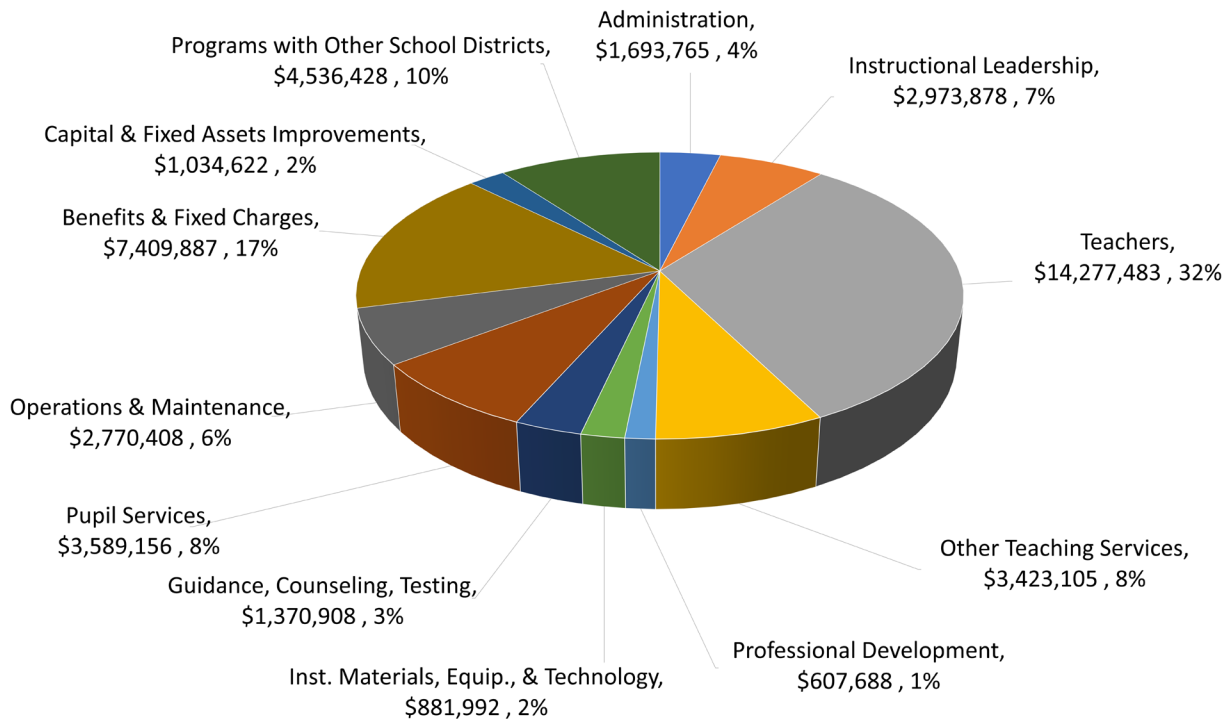
FY25 Final Operating Budget Calculation									
General Fund Operating Overview									
	FY21 ACT	FY22 BUD	FY22 ACT	FY23 BUD	FY23 ACT	FY24 BUD	FY25 BUD	\$ Difference	%
Operating Expense - Gross, before offsets & Overlays	\$ 34,181,172	\$ 38,738,975	\$ 36,461,481	\$ 42,859,392	\$ 40,808,912	\$ 44,071,344	\$ 44,569,320	\$ 497,976	1.13%
Operating Offsets									
	FY21 ACT	FY22 BUD	FY22 ACT	FY23 BUD	FY23 ACT	FY24 BUD	FY25 BUD	\$ Difference	%
<i>Recurring Offsets</i>									
School Choice	\$ 350,819	\$ 399,500	\$ 505,621	\$ 385,000	\$ 486,796	\$ 365,000	\$ 335,000	\$ (30,000)	-8.22%
Preschool Tuition	\$ 6,716	\$ 75,740	\$ 44,259	\$ 84,407	\$ -	\$ 87,960	\$ 117,000	\$ 29,040	33.02%
Special Education Tuition In	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,000	\$ 40,000	0.00%
Facilities Rental	\$ -	\$ 2,000	\$ 2,000	\$ 2,000	\$ -	\$ 2,000	\$ 2,000	\$ -	0.00%
Special Ed Grants	\$ 379,595	\$ 392,747	\$ 442,977	\$ 470,095	\$ 518,157	\$ 470,095	\$ 480,095	\$ 10,000	2.13%
ESSER Grants	\$ -	\$ -	\$ 135,839	\$ 147,226	\$ 173,207	\$ -	\$ -	\$ -	0.00%
Title I	\$ -	\$ -	\$ 66,360	\$ 65,522	\$ 142,070	\$ 65,522	\$ 64,190	\$ (1,332)	-2.03%
Circuit Breaker Offset	\$ 377,745	\$ 934,096	\$ 1,177,434	\$ 1,038,894	\$ 1,311,169	\$ 1,224,339	\$ 1,352,357	\$ 128,018	10.46%
Regional Transportation Revolving Fund	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 425,000	\$ 455,198	\$ 30,198	7.11%
<b>Total Offsets</b>	<b>\$ 1,114,875</b>	<b>\$ 1,804,083</b>	<b>\$ 2,374,490</b>	<b>\$ 2,193,144</b>	<b>\$ 2,631,399</b>	<b>\$ 2,639,916</b>	<b>\$ 2,845,840</b>	<b>\$ 205,924</b>	<b>7.80%</b>
General Fund After Offsets									
	FY21 ACT	FY22 BUD	FY22 ACT	FY23 BUD	FY23 ACT	FY24 BUD	FY25 BUD	\$ Difference	%
Operating Expense - Gross, after offsets & Overlays	\$ 33,066,297	\$ 36,934,892	\$ 34,086,991	\$ 40,666,248	\$ 38,177,513	\$ 41,431,428	\$ 41,723,480	\$ 292,052	0.70%
Operating Funding Sources									
	FY21 ACT	FY22 BUD	FY22 ACT	FY23 BUD	FY23 ACT	FY24 BUD	FY25 BUD	\$ Difference	%
<i>Revenues</i>									
Chapter 70-Base Aid	\$ 3,742,189	\$ 3,715,561	\$ 3,791,389	\$ 3,742,189	\$ 3,889,489	\$ 3,889,489	\$ 4,019,168	\$ 129,679	3.33%
State Transportation	\$ 332,124	\$ 372,065	\$ 373,446	\$ 382,323	\$ 545,080	\$ -	\$ -	\$ -	0.00%
Charter School Reimbursement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	0.00%
Medicaid Reimbursement	\$ 59,064	\$ 45,000	\$ 244,998	\$ 45,000	\$ 118,983	\$ 95,000	\$ 105,000	\$ 10,000	10.53%
Interest Income	\$ 3,070	\$ 10,000	\$ 1,982	\$ 3,070	\$ 182,010	\$ 3,070	\$ 33,070	\$ 30,000	977.36%
Prior Year Unexpended Encumbrances	\$ 144,178	\$ -	\$ 102,635	\$ -	\$ 102,567	\$ -	\$ -	\$ -	0.00%
E-Rate	\$ -	\$ -	\$ -	\$ -	\$ 67,518	\$ -	\$ -	\$ -	0.00%
Other Income	\$ 44,108	\$ -	\$ 33,281	\$ -	\$ 56,846	\$ -	\$ -	\$ -	0.00%
<b>Total Revenues</b>	<b>\$ 4,324,732</b>	<b>\$ 4,142,627</b>	<b>\$ 4,547,730</b>	<b>\$ 4,172,582</b>	<b>\$ 4,962,492</b>	<b>\$ 3,987,559</b>	<b>\$ 4,157,238</b>	<b>\$ 169,679</b>	<b>4.26%</b>
<i>Transfers In From Other Funds</i>									
Excess and Deficiency Returned	\$ 217,329	\$ -	\$ -	\$ 774,620	\$ 774,620	\$ 773,064	\$ 773,064	\$ -	0.00%
Excess and Deficiency Offset by Expenses	\$ -	\$ -	\$ -	\$ 2,325,000	\$ 2,325,000	\$ 2,399,382	\$ 1,529,244	\$ (870,138)	-36.27%
<b>Total Transfers</b>	<b>\$ 217,329</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 3,099,620</b>	<b>\$ 3,099,620</b>	<b>\$ 3,172,446</b>	<b>\$ 2,302,308</b>	<b>\$ (870,138)</b>	<b>-27.43%</b>
<b>Total Funding Sources</b>	<b>\$ 4,542,061</b>	<b>\$ 4,142,627</b>	<b>\$ 4,547,730</b>	<b>\$ 7,272,202</b>	<b>\$ 8,062,112</b>	<b>\$ 7,160,005</b>	<b>\$ 6,459,546</b>	<b>\$ (700,459)</b>	<b>-9.78%</b>
<b>NET OPERATING BUDGET</b>	<b>\$ 28,524,236</b>	<b>\$ 32,792,265</b>	<b>\$ 29,539,262</b>	<b>\$ 33,394,046</b>	<b>\$ 30,115,400</b>	<b>\$ 34,271,424</b>	<b>\$ 35,263,935</b>	<b>\$ 992,511</b>	<b>2.90%</b>
Calculation of Individual Town Assessments									
	FY21 ACT	FY22 BUD	FY22 ACT	FY23 BUD	FY23 ACT	FY24 BUD	FY25 BUD	\$ Difference	%
Town of Hamilton		\$ 21,131,336		\$ 21,839,706		\$ 22,694,537	\$ 23,376,462		
Capital Debt Assessment "Shift"		\$ -		\$ -		\$ -	\$ -		
Net Operating Assessment	\$ 20,227,834 63.86%	\$ 21,131,336 64.44%	\$ 21,131,336 64.44%	\$ 21,839,706 65.40%	\$ 21,839,706	\$ 22,694,537 66.22%	\$ 23,376,462 66.29%	\$ 681,925	3.00%
Town of Wenham		\$ 11,660,930		\$ 11,554,340		\$ 11,576,887	\$ 11,887,472		
Capital Debt Assessment "Shift"		\$ -		\$ -		\$ -	\$ -		
Net Operating Assessment	\$ 11,447,446 36.14%	\$ 11,660,930 35.56%	\$ 11,660,930 35.56%	\$ 11,554,340 34.60%	\$ 11,554,340	\$ 11,576,887 33.78%	\$ 11,887,472 33.71%	\$ 310,585	2.68%

## Operating Expenditures by DESE Categories

The following pages outline the breakdown of the District's General Operating Expenses (before offsets) by the Massachusetts Department of Elementary and Secondary Education (DESE) categories. The chart below shows the year-over-year change per DESE category, while the graph describes the percentages of the total operating budget that is spent in each DESE category.

Summary by DESE Category	FY21	FY22	FY22	FY22	FY23	FY23	FY23	FY24	FY24	FY25	FY25	Change YoY		
	Actuals	FTE	Budget	Actuals	FTE	Budget	Actuals	FTE	Budget	FTE	Budget	FTE	\$	%
Administration	\$ 1,063,926	7.47	\$ 1,383,565	\$ 1,149,272	7.84	1,462,438	\$ 1,315,390	8.04	\$ 1,564,488	8.09	\$ 1,693,765	0.05	\$ 129,277	8.26%
Instructional Leadership	\$ 2,344,429	26.27	\$ 2,618,506	\$ 2,526,613	26.25	2,761,992	\$ 2,600,142	25.73	\$ 2,721,311	26.76	\$ 2,973,878	1.03	\$ 252,567	9.28%
Teachers	\$ 12,679,496	153.70	\$ 13,183,707	\$ 13,140,067	157.60	13,931,127	\$ 13,558,644	153.60	\$ 14,065,389	151.10	\$ 14,277,483	(2.50)	\$ 212,094	1.51%
Other Teaching Services	\$ 2,631,831	68.08	\$ 3,014,610	\$ 2,877,674	73.85	3,278,704	\$ 2,903,616	67.98	\$ 3,175,103	65.02	\$ 3,423,105	(2.96)	\$ 248,001	7.81%
Professional Development	\$ 129,123	3.60	\$ 636,021	\$ 506,540	3.50	640,177	\$ 506,504	3.50	\$ 629,362	3.50	\$ 607,688	-	\$ (21,674)	-3.44%
Inst. Materials, Equip., & Technology	\$ 746,209	-	\$ 854,757	\$ 771,114	-	961,543	\$ 1,126,369	-	\$ 847,106	-	\$ 881,992	-	\$ 34,886	4.12%
Guidance, Counseling, Testing	\$ 1,095,612	13.78	\$ 1,147,345	\$ 1,247,127	16.78	1,481,901	\$ 1,416,744	15.78	\$ 1,459,404	13.78	\$ 1,370,908	(2.00)	\$ (88,496)	-6.06%
Pupil Services	\$ 2,287,046	8.97	\$ 2,864,857	\$ 2,682,409	9.74	3,035,501	\$ 2,997,856	9.25	\$ 3,609,330	9.50	\$ 3,589,156	0.25	\$ (20,174)	-0.56%
Operations & Maintenance	\$ 2,207,181	16.25	\$ 2,366,101	\$ 2,759,241	16.25	2,900,639	\$ 2,806,122	16.25	\$ 2,848,878	16.25	\$ 2,770,408	-	\$ (78,470)	-2.75%
Benefits & Fixed Charges	\$ 4,806,832	0.86	\$ 5,927,024	\$ 4,918,405	0.86	8,146,280	\$ 7,256,466	0.86	\$ 6,282,809	0.52	\$ 7,409,887	(0.34)	\$ 1,127,078	17.94%
Capital & Fixed Assets Improvements	\$ 96,774	-	\$ -	\$ 183,195	-	-	\$ 375,092	-	\$ 2,273,287	-	\$ 1,034,622	-	\$ (1,238,665)	-54.49%
Programs with Other School Districts	\$ 4,092,713	-	\$ 4,742,482	\$ 3,699,826	-	4,259,090	\$ 3,945,967	-	\$ 4,594,877	-	\$ 4,536,428	-	\$ (58,449)	-1.27%
<b>Grand Total</b>	<b>\$ 34,181,172</b>	<b>298.98</b>	<b>\$ 38,738,975</b>	<b>\$ 36,461,481</b>	<b>312.67</b>	<b>42,859,392</b>	<b>\$ 40,808,912</b>	<b>300.99</b>	<b>\$ 44,071,344</b>	<b>294.52</b>	<b>\$ 44,569,320</b>	<b>(6.47)</b>	<b>\$ 497,976</b>	<b>1.13%</b>

### FY25 BUDGET EXPENDITURES BY DESE CATEGORY

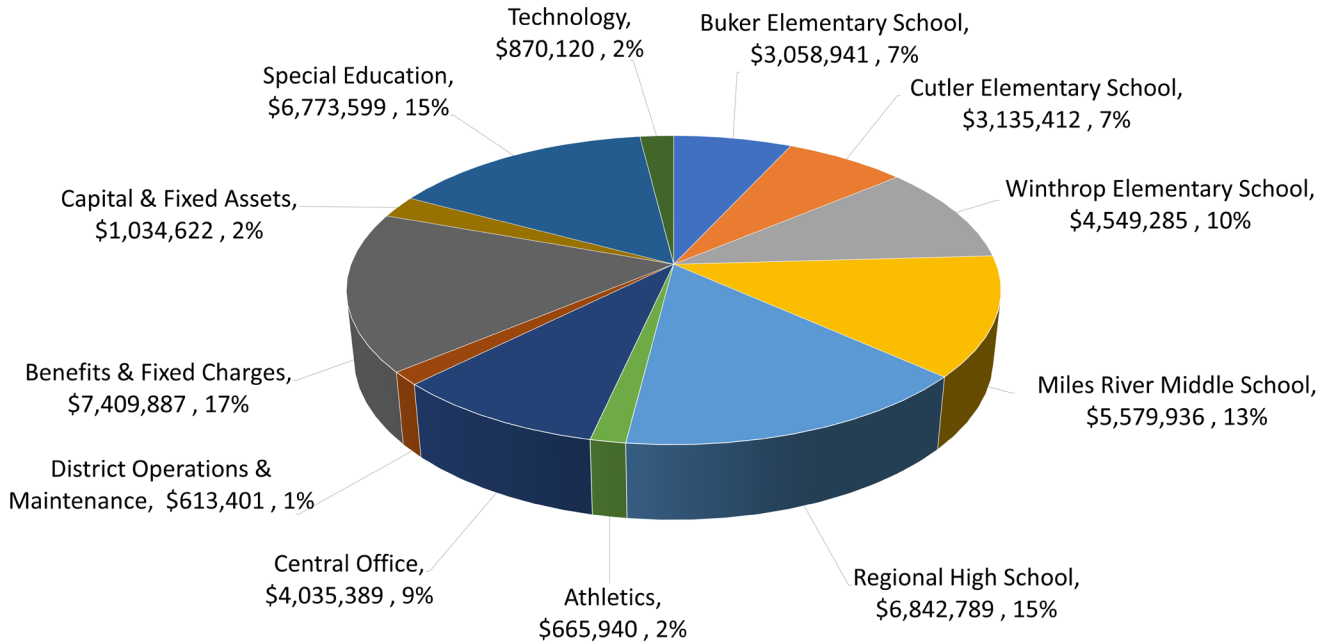


## Operating Expenditures by School Site

The table below totals the budget of each school or program that makes up the General Operating Expenses (before offsets). The “Expenditure by School Site and Support Program” chart below shows the year-over-year change in each area, while the graph describes the percentages of the total operating budget that is spent in each area.

Summary By Site & Support Program	FY21	FY22	FY22	FY22	FY23	FY23	FY23	FY24	FY24	FY25	FY25	Change YoY		
	Actuals	FTE	Budget	Actuals	FTE	Budget	Actuals	FTE	Budget	FTE	Budget	FTE	\$	%
Buker Elementary School	\$ 2,279,142	32.84	\$ 2,401,019	\$ 2,467,205	36.07	2,645,733	\$ 2,536,890	36.37	\$ 2,868,181	38.62	\$ 3,058,941	2.25	\$ 190,760	6.65%
Cutler Elementary School	\$ 2,711,678	41.39	\$ 2,890,214	\$ 2,737,552	41.54	2,906,665	\$ 2,785,772	40.68	\$ 3,107,688	37.44	\$ 3,135,412	(3.25)	\$ 27,723	0.89%
Winthrop Elementary School	\$ 3,558,534	60.13	\$ 3,866,855	\$ 3,925,115	62.84	4,204,907	\$ 3,940,237	59.14	\$ 4,205,911	61.79	\$ 4,549,285	2.65	\$ 343,374	8.16%
Miles River Middle School	\$ 4,304,894	54.48	\$ 4,800,861	\$ 4,916,814	58.58	5,298,337	\$ 5,085,694	56.06	\$ 5,245,847	55.81	\$ 5,579,936	(0.25)	\$ 334,089	6.37%
Regional High School	\$ 6,065,656	71.18	\$ 6,433,942	\$ 6,499,775	73.48	6,872,307	\$ 6,588,758	69.68	\$ 6,865,633	67.23	\$ 6,842,789	(2.45)	\$ (22,844)	-0.33%
Athletics	\$ 343,450	1.75	\$ 460,633	\$ 426,795	1.75	529,967	\$ 482,262	1.75	\$ 594,813	2.00	\$ 665,940	0.25	\$ 71,127	11.96%
Central Office	\$ 2,912,579	12.65	\$ 3,516,031	\$ 3,105,997	13.26	3,749,943	\$ 3,487,055	13.76	\$ 3,972,792	11.86	\$ 4,035,389	(1.90)	\$ 62,597	1.58%
District Operations & Maintenance	\$ 431,792	3.25	\$ 516,208	\$ 598,871	3.25	906,614	\$ 766,202	3.25	\$ 584,884	3.25	\$ 613,401	-	\$ 28,517	4.88%
Benefits & Fixed Charges	\$ 4,806,832	0.86	\$ 5,927,024	\$ 4,918,405	0.86	8,146,280	\$ 7,256,466	0.86	\$ 6,282,809	0.52	\$ 7,409,887	(0.34)	\$ 1,127,078	17.94%
Capital & Fixed Assets	\$ 96,774	-	\$ -	\$ 183,195	-	-	\$ 375,092	-	\$ 2,273,287	-	\$ 1,034,622	-	\$ (1,238,665)	-54.49%
Special Education	\$ 5,814,049	13.44	\$ 6,977,781	\$ 5,762,244	14.04	6,565,714	\$ 6,219,193	12.44	\$ 7,128,682	10.00	\$ 6,773,599	(2.44)	\$ (355,083)	-4.98%
Technology	\$ 855,794	7.00	\$ 948,408	\$ 919,513	7.00	1,032,926	\$ 1,285,290	7.00	\$ 940,817	6.00	\$ 870,120	(1.00)	\$ (70,697)	-7.51%
<b>District Totals</b>	<b>\$ 34,181,172</b>	<b>298.98</b>	<b>\$ 38,738,975</b>	<b>\$ 36,461,481</b>	<b>312.67</b>	<b>42,859,392</b>	<b>\$ 40,808,912</b>	<b>300.99</b>	<b>\$ 44,071,344</b>	<b>294.52</b>	<b>\$ 44,569,320</b>	<b>(6.47)</b>	<b>\$ 497,976</b>	<b>1.13%</b>

### FY25 BUDGET EXPENDITURES BY SITE AND SUPPORT SYSTEM





## Summary of Changes to FY25 Operating Budget

The FY25 Operating Budget is experiencing an increase of \$497,976 over the FY24 Budget or 1.13%. The table below outlines the major cost “drivers” that are contributing to this increase. The list includes increases in personnel salaries for “COLA,” or Cost of Living Adjustments, as well as increases to personnel salaries based on years of experience and earned graduate credits, all of which are outlined in the Collective Bargaining Agreements between the School Committee and the respective Bargaining Units. The COLA adjustment for FY25 for the Educational Support Professionals (ESP – previously Teaching Assistants) is 2.5% however, due to FY25 representing the first budget year that incorporates the new rates for this newly formed union, the overall effect was much greater than 2.5%. The Teachers, Office Personnel, and Custodian Bargaining Units are all under negotiations for FY25.

The overall increase of \$497,976 is the net result of both increases and decreases. Overall FY25 represents a reduction in services rather than a level service budget when services are equal year-over-year. In total, (6.5) FTEs were cut from the budget to mitigate our year-over-year increase. In total, our reductions to staffing removed \$(566)K from our budget. This combined with a reduction of \$(870)K from a lower Excess & Deficiency certification and \$(582)K in other reductions brings the total reduction to level services to \$(2.0)M.

Major notable increases outside of the \$1.3M in union contractual agreements (COLA, Steps, Column Advancement) include a \$133,948 increase to our Essex County Retirement Liability which represents a 12.7% increase to that line item. \$229K for additional staffing at the elementary level due to increased enrollment. In addition, the District is experiencing high levels of inflation that is hitting us especially hard as it relates to our health insurance premiums. In total, the District’s portion of insurances, taxes, & 403b match is increasing \$468,274 year-over-year.

Summary of Changes Over +/- \$10,000			
COLA Increases to Base Salaries	\$ 688,042	Crossing Guard Reductions (-0.34CXG)	\$ (10,012)
Insurances, Taxes, & 403b Match	\$ 468,274	Professional Development \$250/Teacher FTE	\$ (11,609)
Step Increases	\$ 250,579	PT Reorganization (0.46FTE)	\$ (13,066)
New ESP Contract	\$ 205,099	Technology Personnel Reduction	\$ (18,922)
Essex County Pension Appropriation	\$ 133,948	Elementary Specialists Reorganization/Turnover	\$ (24,353)
FY25 TLC New Investment (+1.0 Teacher)	\$ 90,542	English as a Second Language Reorganization	\$ (34,593)
Cost of FY24 1\$/1% Split	\$ 85,217	ESP Elementary Reorganization (-1.5 ESP)	\$ (40,047)
Technology	\$ 80,880	Student Services Office Personnel (.079)FTE	\$ (43,095)
Salary Scale Advancement	\$ 78,870	Café Bailout	\$ (50,000)
Athletics Department	\$ 71,127	Contracted Service Reductions	\$ (51,953)
Library Staff Changes (+2.0 Teacher -1.84ESP)	\$ 69,226	OOD Tuitions	\$ (52,973)
Grade School Bubble Teacher	\$ 68,871	Net All Other Changes	\$ (54,666)
OPEB Trust Fund	\$ 50,000	FY25 Planned MS Teacher Reductions	\$ (58,605)
PreK Classroom Personnel	\$ 35,209	Teacher to ESP Trade In (-1.0 Teacher)	\$ (91,401)
Utilities	\$ 29,774	FY25 Planned HS Teacher Reductions	\$ (93,768)
Substitute Usage Increase	\$ 27,323	Transportation Changes	\$ (102,838)
Supplies, Testing, & Assessment Materials	\$ 22,965	Psychologist Reduction (1.0) FTE	\$ (104,746)
COLA Increases to Stipends	\$ 20,398	Turnover of Staff Members	\$ (107,195)
New Scholarship Pool (Outside of Athletics)	\$ 13,750	FY24 Planned Reductions/Change	\$ (183,815)
Custodian S&M, Clothing, & Personnel	\$ 11,083	Excess & Deficiency Offsets	\$ (870,138)
New Stipends Funded through Budget	\$ 10,420		(2,017,795)
Net All Other Changes Under +/- \$10,000	\$ 4,174		
	<u>2,515,771</u>		
	Total	\$	497,976 1.13%

## **Fiscal Year 2025 Capital Financing Budget**

### *Capital Financing Expenses and Assessment – Summary*



## Capital Financing Expenses and Assessment - Summary

Total Capital Debt Service Expenses for FY25 are \$2,066,694. This amount is the total of the amounts required to service the bonds issued to finance school renovation projects completed in the summer of 2013 (\$126,100), the debt service for the bond to finance the Buker Boiler and Winthrop Boiler and Window projects (\$122,600), and the debt service for the BAN to finance the Winthrop Sprinkler Project (\$133,909), and the debt service for the BAN to finance the various FY21 Capital Projects (\$207,478). In addition to these debt service projects which were all included in the previous budget cycle (FY24 Budget), is the debt service for the Cutler Feasibility Study & the Athletic Complex Project. FY25 represents the first budget cycle that includes payments for these two projects. Combined, expenses for FY25 relating to the Cutler Feasibility Study & the Athletic Complex Project total \$1,476,607 which is nearly triple the previous year's total debt service budget.

Currently, debt service is assessed in the same manner as our operating budget, 66.29% Hamilton and 33.71% Wenham. Hamilton's share of the total amount after offsets and revenues is \$1,321,020 and of this amount, \$1,209,702 was voted as a debt exclusion outside of the levy and proposition 2 ½ while \$111,318 is included in proposition 2 ½ as they were not voted as debt exclusions. Wenham's share is \$671,769, all of which has been approved as debt exclusions outside of proposition 2 ½.

FY25 Final Debt Service Budget Detail					
FY25 Debt Service Budget					
				66.29%	33.71%
	Principal	Interest	Total	Hamilton Share	Wenham Share
Cutler Roof & Summer 2013 Projects	\$ 105,000	\$ 21,100	\$ 126,100	\$ 83,592	\$ 42,508
Buker Boiler & Winthrop Boiler/Glass	\$ 105,000	\$ 17,600	\$ 122,600	\$ 81,272	\$ 41,328
Winthrop Sprinkler System	\$ 125,000	\$ 8,909	\$ 133,909	\$ 88,768	\$ 45,141
FY21 Capital Projects	\$ 191,600	\$ 15,878	\$ 207,478	\$ 137,537	\$ 69,941
Cutler Feasibility Study	\$ -	\$ 41,438	\$ 41,438	\$ 27,469	\$ 13,969
Athletic Complex	\$1,000,000	\$435,169	\$1,435,169	\$ 951,374	\$ 483,795
<b>Net Assessment</b>	<b>\$1,526,600</b>	<b>\$540,094</b>	<b>\$2,066,694</b>	<b>\$ 1,370,011</b>	<b>\$ 696,683</b>
FY24 Debt Service Budget					
				66.22%	33.78%
	Principal	Interest	Total	Hamilton Share	Wenham Share
Cutler Roof & Summer 2013 Projects	\$ 100,000	\$ 24,175	\$ 124,175	\$ 82,229	\$ 41,946
Buker Boiler & Winthrop Boiler/Glass	\$ 95,000	\$ 19,600	\$ 114,600	\$ 75,888	\$ 38,712
Winthrop Sprinkler System	\$ 125,000	\$ 15,258	\$ 140,258	\$ 92,879	\$ 47,379
FY21 Capital Projects	\$ 191,600	\$ 25,794	\$ 217,394	\$ 143,959	\$ 73,436
Cutler Feasibility Study	\$ -	\$ -	\$ -	\$ -	\$ -
Athletic Complex	\$ -	\$ -	\$ -	\$ -	\$ -
<b>Net Assessment</b>	<b>\$ 511,600</b>	<b>\$ 84,827</b>	<b>\$ 596,427</b>	<b>\$ 394,954</b>	<b>\$ 201,473</b>
Debt Service Budget Change YoY					
	Principal	Interest	Total	Hamilton Share	Wenham Share
Cutler Roof & Summer 2013 Projects	\$ 5,000	\$ (3,075)	\$ 1,925	\$ 1,363	\$ 562
Buker Boiler & Winthrop Boiler/Glass	\$ 10,000	\$ (2,000)	\$ 8,000	\$ 5,383	\$ 2,617
Winthrop Sprinkler System	\$ -	\$ (6,349)	\$ (6,349)	\$ (4,110)	\$ (2,238)
FY21 Capital Projects	\$ -	\$ (9,916)	\$ (9,916)	\$ (6,421)	\$ (3,495)
Cutler Feasibility Study	\$ -	\$ 41,438	\$ 41,438	\$ 27,469	\$ 13,969
Athletic Complex	\$1,000,000	\$435,169	\$1,435,169	\$ 951,374	\$ 483,795
<b>Net Assessment</b>	<b>\$1,015,000</b>	<b>\$455,267</b>	<b>\$1,470,267</b>	<b>\$ 975,057</b>	<b>\$ 495,210</b>

## **FY25 Operating Budgets for Elementary Programs**

*Buker Elementary School*

*Cutler Elementary School*

*Winthrop Elementary School*



## *Bessie Buker Elementary School*

*Ben Schersten, Principal*

There are 258 students enrolled in kindergarten through fifth grade in thirteen classrooms at Buker Elementary School. Our school staff consists of 51 full and part-time members. We all share in the collective responsibility of creating a community and shared learning experiences for all of our students as we build the foundation of their formal education.

This year across all the elementary schools, we have implemented an MTSS structure including intervention and extension blocks at each grade level, K-5. These 40-minute blocks occur four times weekly and allow students to receive instruction in areas where they have been identified as needing additional support or allow them to extend their learning in areas where they demonstrate strength. This has been supported by data meetings which occur with teachers, principals, and instructional coaches on a three-week cycle. Teachers analyze data to support fluid, student groups and instructional foci.

Teachers from each elementary school participated in a curriculum review for our Social and Emotional Learning curriculum, culminating in recommendations to the District. This curriculum review will continue this spring to begin the work of bringing forward a common language, as well as core lessons to address bullying and self-regulation. This work will supplement the continued commitment to the approach of Responsive Classroom.

Another committee of teachers from across the three elementary schools is engaged in a math curriculum review process. After establishing our priorities for math instruction, we will evaluate and identify 2 or 3 math programs that meet the standard of “high-quality instructional materials” to pilot in the spring. We look forward to identifying a new program for adoption for next school year.

At Buker School, we look to foster a strong community within the building, as well as connect to the greater community. We host an annual winter food drive for the Acord Food Pantry. Our buddy classrooms continue to work together, we celebrated the veterans connected to members of our community, and we created a snow gear library to help make sure everyone can be dry and warm during outdoor recesses.

The students of Buker School continue to benefit from extensive community assistance to our school. Through the support of the Friends of Buker, we have been able to continue with our cultural enrichment programs including visits from authors, performers, and local science centers. These visits from experts help enhance the educational experiences of our students.

We value the connections between and among staff, families, students, and the Hamilton-Wenham community. We know when adults work together and students feel secure at school, students will be successful.



## *Cutler Elementary School*

*Juliana Schneider, Principal*

There are 255 students enrolled in kindergarten through fifth grade in thirteen classrooms at Cutler School. Our school staff consists of a total of 52 full and part-time members. Cutler School is home to our district-wide language-based learning disability program for students in grades 3-5, which is integrated into the school and is an integral part of our community.

This year across all the elementary schools, we have implemented an MTSS structure including intervention and extension blocks at each grade level, K-5. These 40-minute blocks occur four times weekly and allow students to receive instruction in areas where they have been identified as needing additional support or allow them to extend their learning in areas where they demonstrate strength. This has been supported by data meetings which occur with teachers, principals, and instructional coaches on a three-week cycle. Teachers analyze data to support fluid, student groups, and instructional foci.

Teachers from each elementary school participated in a curriculum review for our Social and Emotional Learning curriculum, culminating in recommendations to the District. This curriculum review will continue this spring to begin the work of bringing forward a common language, as well as core lessons to address bullying and self-regulation. This work will supplement the continued commitment to the approach of Responsive Classroom.

The elementary schools have also engaged in a math curriculum review and are making recommendations for piloting materials this spring. We hope to adopt materials for next year.

Additionally, Cutler has continued working on supporting a culture that nurtures a sense of belonging. Students have participated in multi-age community groups supporting this work, we have worked with the Friends group to get every child a Cutler t-shirt to wear on specific days, and we have continued to engage in conversations around equity and belonging. This means that we are working to provide access to every experience at Cutler. We provided all school supplies this year, we supported families during the holidays, and we have changed the culture around our Ski Sale and Book Fair to make both more accessible to every family.

The Cutler community has focused on Tier 2 instruction, deepening the work that they did last year, focusing on Tier 1 instruction. We look forward to a wonderful spring.





## *Winthrop Elementary School*

*Carolyn Shediak, Principal*

There are 334 students enrolled at Winthrop School, Pre-K through fifth grade, in 21 classrooms. Our school staff consists of a total of 75 full and part-time members, including Boomer, our classroom assistance dog. Winthrop School is home to our district-wide Integrated Preschool program, Intensive Learning program, and CASL (Center for Academic-Social Learning) program.

This year across all the elementary schools, we have implemented an MTSS structure including intervention and extension blocks at each grade level, K-5. These 40-minute blocks occur four times weekly and allow students to receive instruction in areas where they have been identified as needing additional support or allow them to extend their learning in areas where they demonstrate proficiency. This has been supported by data meetings which occur with teachers, principals, and instructional coaches on a three-week cycle. Teachers analyze data to support fluid, student groups, and instructional foci.

A committee of teachers from each elementary school participated in a curriculum review for our Social and Emotional Learning curriculum, culminating in recommendations to the District. This curriculum review will continue this spring, to begin the work of bringing forward a common language, as well as core lessons to address bullying and self-regulation. This work will supplement the continued commitment to the Responsive Classroom approach and structures.

Another committee of teachers from across the three elementary schools is engaged in a math curriculum review process. After establishing our priorities for math instruction, we will evaluate and identify 2 or 3 math programs that meet the standard of “high-quality instructional materials” to pilot in the spring. We look forward to identifying a new program for adoption for next school year.

We continue to foster a strong community within Winthrop, as well as connect to the greater community each year, and value our relationship with several area agencies. Northeast Veterans Outreach, which serves at-risk Veterans in MA and NH, received heartfelt Veterans Day and Valentine’s cards made by Winthrop School students. Students brought in 100 cents to celebrate the 100<sup>th</sup> day of school which was donated to Acord Food Pantry. The school community will continue the tradition of writing Valentines to seniors which will be shared with our elderly neighbors.

Winthrop School students benefit from extensive community assistance to our school. The Friends of Winthrop continue to support enrichment opportunities for our students by funding field trips and in-school programs, including trips to North Shore Music Theatre, visiting science programs, and Mother Goose in PreK, among many others. In the past year, the Hamilton-Wenham EdFund has awarded grants to bring in a jump roping program in PE. Our PreK classrooms received grants to refurbish classrooms with interactive learning centers. One of our Special Education programs received funding to run a weekly cooking group. Teachers appreciate the opportunities.

Winthrop continues to help build connections between students and staff through monthly community groups, with students from across the grades coming together in small groups to get to know each other and participate in collaborative projects. Winthrop School is a wonderful community where staff, students, and families continue to learn and grow together.



**FY25 Operating Budgets for Secondary Programs**

*Miles River Middle School*

*Hamilton-Wenham Regional High School*

*Athletic Programs*



## *Miles River Middle School*

*Dr. Zach Best, Principal*

*Ms. Liana Gerstein, Assistant Principal*

Miles River Middle School provides a comprehensive academic program for 375 students in grades 6-8. The faculty is composed of 59 full-time and part-time professionals who serve as content experts, special education instructors, office and support staff, administrators, educational support professionals, and counselors.

Miles River offers an age-appropriate curriculum designed to educate the whole child, which includes English Language Arts, Mathematics, Social Studies, Science, and World Language. Students also participate in Physical Education, Health & Wellness, Music, Visual Art, and Theater, and may elect to participate in either Band or Chorus. We continue to expand access to the curriculum through technology with our technology integration specialist, the middle school Collaboratory, and 1:1 iPads and Chromebooks.

Miles River Middle School is well-positioned to address the needs of our middle school students:

- Miles River utilizes the Team structure, which allows for smaller learning communities and the opportunity to foster meaningful relationships.
- All sixth graders participate in a one-day orientation and are partnered with a Peer Leader for the duration of their 6<sup>th</sup> grade year.
- Two full-time counselors are available to meet the needs of students with check-ins and small group meetings and are instrumental in providing social-emotional support.
- All 7<sup>th</sup> and 8<sup>th</sup> grade students are provided an iPad, and all 6<sup>th</sup> grade students are provided a Chromebook. We maintain a robust technology team and infrastructure to support students and staff.
- Students are introduced to both Spanish and Mandarin in the 6<sup>th</sup> grade and continue their language study full-time in 7<sup>th</sup> and 8<sup>th</sup> grades. Students enter HWRHS having completed the equivalent of a year's study of their World Language.

Miles River is working to develop a robust multi-tiered system of support (MTSS) for our middle school students.

- Students participate in activities designed to support executive functioning.
- ELA teachers utilize the DIBELS screener to determine students' reading needs.
- We have expanded the use of the iReady math screener to three times per year and are utilizing intervention components of iReady to provide targeted support to some students.

Miles River is proud of the variety of activities that students participate in outside of the classroom. We offer a wide range of opportunities in the fine and performing arts, as well as a number of interest clubs.

- Our Band and Choral programs present two public concerts during the year. Participation in these programs is on the rise post-pandemic: nearly half of our sixth graders are enrolled in either Band or Chorus.
- Our Theater program presents a musical as well as an entry to a one-act play festival.
- The Miles River Arts Night is a public event for community members to experience a school-wide art exhibit and performances by our music and theater departments.
- Miles River offers a wide variety of interest clubs, including Baking Club, GSA, Art Club, Guitar, and Ukulele Club, Jazz Band, Chorale, Student Council, and many more.
- We are excited for our 8<sup>th</sup> grade trip to Washington, D.C., and a trip to Spain for Spanish students.
- We offer a robust intramural program, with opportunities for students to play dodgeball, golf, track and field, kickball, ping-pong, badminton, pickleball, and many more.
- The Peer Mentoring program provides 7<sup>th</sup> and 8<sup>th</sup> grade students the opportunity to serve as peer mentors for our 6<sup>th</sup> grade students.
- Miles River chartered a National Junior Honors Society last year, and participants continue to be actively engaged in community service projects.



## *Hamilton-Wenham Regional High School*

*Bryan Menegoni, Principal*

*Jeff Becker, Assistant Principal*

Hamilton-Wenham Regional High School provides a comprehensive academic program for 441 students in grades 9-12. The High School team is composed of 89 professionals who serve as teachers, 6-12 curriculum leaders, special education instructors and related-service providers, counselors, office and support staff, teaching assistants, custodians, athletic staff, cafeteria staff, and administrators.

In the winter of 2023, the District adopted a new strategic plan for 2023-2026. This plan will serve as a guide for everything that we do on behalf of our students, educators, families, and community members. What follows here is a description of the high school's contribution to the fulfillment of the strategic plan.

The high school is continuing to build its Multi-Tiered System of Support (MTSS). This year, the focus has shifted to the use of data to identify students in need of support and to align interventions for those students. The ninth-grade support block team meets weekly to examine student progress and adjust the approach that aligns with each student's needs. In addition, a math-specific support block for ninth and tenth graders uses data from a screening tool, grades, and assessments to identify students in need of assistance in math, and instruction in this support block can be tailored to build missing skills or accelerate learning in the current math course. The high school is considering taking a similar approach in English Language Arts. The ninth-grade team of teachers meets biweekly to discuss students who are in need of support and develop interventions as needed. The focus on our youngest learners is designed to help them build the foundational skills that they will need throughout their four years of high school.

In addition to the use of data as part of the buildout of a robust MTSS, the high school also is investigating the use of instructional resources for the core math courses of Algebra 1, Geometry, and Algebra 2. This is a yearlong process and will result in the selection of a common resource that will allow all of our students to have a consistent experience that is in line with the goals of the math department and that is part of an effective MTSS.

The high school has also sought to improve communication with all stakeholders. The high school has contributed to the communication goal by enhancing its weekly newsletter to families. In addition, the high school has established a social media team composed of students, teachers, and community members. This team will be able to share content with the community and promote the many positive aspects of the high school.

Another contribution of the high school to the strategic plan is an enhancement of learning opportunities outside of the walls of the classroom. We have been actively increasing the display of student work both inside and outside of the school, with the belief that a larger audience will raise the quality and appreciation of the work that is produced. In addition, there has been a greater emphasis on field trips for students, with additional resources set in place to support this endeavor. Finally, the high school has a team working to increase the number of participants in the internship program for our older students.

Finally, the high school facility is receiving much-needed attention. In the spring of 2023, the towns approved the allocation of funds to support a major renovation of the outdoor athletic facilities. This project is expected to begin in the spring of 2024 and will provide a major upgrade to the experience for students and community members. In addition, the fitness room underwent a major renovation in the summer of 2023 and has been a much-needed enhancement for all athletic teams and students in their physical education courses. The district plans to apply to the roof reimbursement program for a complete replacement of the high-school roof, as this part of the facility is well past the end of its useful life.

The completed and planned facilities improvements, emphasis on supporting all learners, improved communication, and an increase in out-of-school learning opportunities, will position the high school and the district to move forward by providing meaningful and enriching experiences to all members of our community. We look forward to continuing this work together.



## Athletics

*Craig Genuardo, Director of Athletics*

Hamilton-Wenham Athletics, a proud and successful member of the Massachusetts Interscholastic Athletic Association and Cape Ann League, offers 29 sports over three seasons for boys and girls. In sports where the participation rate allows, we also offer sub-varsity sports at the Junior Varsity and Junior Varsity II levels.

Hamilton-Wenham’s Athletic Department saw incredible success in 2022-23. Over 75 percent of Hamilton-Wenham’s students participated in at least one sport, while 100% of teams earned the MIAA Academic Distinction and MIAA Sportsmanship honors.

Including last year and this fall, ten teams won Cape Ann League Championships, and nine teams earned CAL Sportsmanship Awards. In areas of individual leadership, nine Generals were voted CAL Player of the Year, and nine coaches were named CAL Coach of the Year.

Because of this incredible success, Hamilton-Wenham won the Cape Ann League’s prestigious and sought-after Hyland Award for the third time in four years. The award is given to the outstanding Athletic Department in the Cape Ann League when looking at participation rates, sportsmanship, community service, and success both in the classroom and on the athletic playing fields, courts, rinks, and slopes.

As the MIAA continued its statewide tournament in all team sports, 81% of our teams qualified for the State Tournament. And not only did they qualify, but the Generals also earned astonishing results. Including 2022-23 and this Fall, no fewer than ten teams made the Sweet Sixteen Round, six made the Elite Eight, two made State Final Fours and Girls Tennis won their second consecutive State Championship.

The 2024-25 budget reflects a continuation of our tiered User Fee process as well as a pre-announced fee schedule to provide families with enough lead time to plan for such fees. The district has maintained its contribution to User Fees to 50% and sets aside an additional \$25,000 for scholarships to ensure those who want to participate in Athletics are not prevented from doing so because of financial hardship.

This budget also considers the following:

- Additional costs and offsets for the transition of our facilities during field project construction in the Fall of 2024 and considers a completed project in the Spring of 2025.
- Adds an Assistant Coach to each Varsity team that does not currently have one.
- Increases the uniform budget so teams and programs can get new uniforms every 4-5 years.

District Athletics Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
Salary Director	001.300.3510.1.3.022.100.5	\$104,664	1.00	\$104,665	\$107,259	1.00	108,895	\$108,895	1.00	\$111,073	1.00	\$114,406	\$ 3,333	3.00%
Salary Secretary	001.300.3510.1.3.022.200.5	\$ 35,142	0.75	\$ 35,846	\$ 37,063	0.75	38,039	\$ 38,039	0.75	\$ 39,382	1.00	\$ 54,355	\$ 14,973	38.02%
Salary Summer Nurse/CPR Instructor	001.300.3510.1.3.022.390.5	\$ -	-	\$ 750	\$ 180	-	750	\$ 125	-	\$ 750	-	\$ 750	\$ -	0.00%
Athletics Contract Services	001.300.3510.1.3.022.400.5	\$ 30,781	-	\$ 43,173	\$ 51,082	-	43,770	\$ 48,712	-	\$ 45,935	-	\$ 85,995	\$ 40,060	87.21%
Officials & Other Personnel	001.300.3510.1.3.022.470.5	\$ 3,342	-	\$ 8,978	\$ 7,104	-	9,030	\$ 5,755	-	\$ 12,075	-	\$ 15,204	\$ 3,129	25.91%
Supplies	001.300.3510.1.3.022.500.5	\$ 8,853	-	\$ 14,383	\$ 10,778	-	14,700	\$ 16,128	-	\$ 15,450	-	\$ 26,975	\$ 11,525	74.60%
Repair & Replace Equipment	001.300.3510.1.3.022.520.5	\$ 11,138	-	\$ 13,000	\$ 12,000	-	13,000	\$ 14,980	-	\$ 13,000	-	\$ 13,000	\$ -	0.00%
Other incl League & MIAA	001.300.3510.1.3.022.600.5	\$ 13,525	-	\$ 14,268	\$ 18,256	-	15,750	\$ 16,822	-	\$ 16,400	-	\$ 17,175	\$ 775	4.73%
User Fee Reduction & Scholarships	001.300.3510.1.3.022.603.5	\$136,006	-	\$225,571	\$183,074	-	286,033	\$232,806	-	\$340,748	-	\$338,080	\$ (2,669)	-0.78%
<b>Athletics Total</b>		<b>\$343,450</b>	<b>1.75</b>	<b>\$460,633</b>	<b>\$426,795</b>	<b>1.75</b>	<b>529,967</b>	<b>\$482,262</b>	<b>1.75</b>	<b>\$594,813</b>	<b>2.00</b>	<b>\$665,940</b>	<b>\$ 71,127</b>	<b>11.96%</b>



## **FY25 Operating Budgets for District-Wide Programs**

*Central Office Programs*

*Business Office*

*Curriculum, Assessment & Instruction*

*District Maintenance Programs*

*Fringe Benefits*

*Fixed Assets*

*Student Services Department*

*Technology*



## Central Office Programs

*Dana Allara, School Committee Chair*

Budgeted items for the School Committee for the 2024-2025 school year include expenses related to the conducting of regular School Committee meetings, such as payment for secretarial and custodial services. The School Committee's Budget also includes funding for attendance at the annual Massachusetts Association of School Committee's Conference, supplies and materials, and general legal services for the entire District.

Hamilton-Wenham Central Office Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>School Committee</b>														
Clerical/SC	001.400.1110.9.9.000.200.5	\$ 16,200	0.07	\$ 9,001	\$ 6,660	0.04	16,200	\$ 1,620	0.04	\$ 16,200	0.04	\$ 11,536	\$ (4,664)	-28.79%
Contracted Services/SC	001.400.1110.9.9.000.400.5	\$ 8,560	-	\$ 13,038	\$ 4,448	-	13,038	\$ 7,017	-	\$ 13,038	-	\$ 13,038	\$ -	0.00%
Supplies/Materials--SC	001.400.1110.9.9.000.500.5	\$ 1,113	-	\$ 4,000	\$ 50	-	4,000	\$ 135	-	\$ 4,000	-	\$ 4,000	\$ -	0.00%
OT Exp/SC	001.400.1110.9.9.000.600.5	\$ 6,870	-	\$ 13,612	\$ 15,711	-	13,612	\$ 14,022	-	\$ 13,612	-	\$ 13,612	\$ -	0.00%
Cont Serv Legal and SC	001.400.1430.9.9.000.450.5	\$ 23,490	-	\$ 24,215	\$ 18,706	-	24,215	\$ 20,922	-	\$ 24,215	-	\$ 24,215	\$ -	0.00%
<b>Total</b>		<b>\$ 56,234</b>	<b>0.07</b>	<b>\$ 63,866</b>	<b>\$ 45,576</b>	<b>0.04</b>	<b>71,065</b>	<b>\$ 43,716</b>	<b>0.04</b>	<b>\$ 71,065</b>	<b>0.04</b>	<b>\$ 66,401</b>	<b>\$ (4,664)</b>	<b>-6.56%</b>

## Superintendent's Office

*Eric Tracy, Superintendent*

The Superintendent's Office section of the budget includes line items for the expenses associated with the staffing and operation of the Superintendent's Office. Additionally, this section includes funding for professional development for all administrative staff, and any administrative salary contingency.

Hamilton-Wenham Central Office Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Superintendent's Office</b>														
Supt's Salary	001.400.1210.9.9.000.100.5	\$ 189,000	1.00	\$ 189,000	\$ 189,335	1.00	191,250	\$ 191,250	1.00	\$ 210,000	1.00	\$ 216,300	\$ 6,300	3.00%
Clerical/Supt Office Salary	001.400.1210.9.9.000.200.5	\$ 78,215	1.00	\$ 78,215	\$ 79,600	1.00	81,376	\$ 81,680	1.00	\$ 83,004	1.00	\$ 85,495	\$ 2,491	3.00%
Contracted Services-Supt Office	001.400.1210.9.9.000.400.5	\$ 44,686	-	\$ 40,700	\$ 36,292	-	40,700	\$ 34,599	-	\$ 20,700	-	\$ 38,526	\$ 17,826	86.11%
Supplies and Materials-Supt Office	001.400.1210.9.9.000.500.5	\$ 13,855	-	\$ 5,000	\$ 1,841	-	5,000	\$ 8,142	-	\$ 5,000	-	\$ 7,946	\$ 2,946	58.91%
Non Expt Supt Office	001.400.1210.9.9.000.520.5	\$ -	-	\$ 25,000	\$ 1,782	-	25,000	\$ 4,304	-	\$ 25,000	-	\$ 25,000	\$ -	0.00%
PD, Travel, Affil. Supt Office	001.400.1210.9.9.000.600.5	\$ 10,727	-	\$ 13,206	\$ 14,968	-	13,206	\$ 12,243	-	\$ 13,206	-	\$ 13,206	\$ -	0.00%
Admin PD	001.400.1210.9.9.000.640.5	\$ 7,144	-	\$ 22,000	\$ 5,244	-	22,000	\$ 10,036	-	\$ 22,000	-	\$ 20,000	\$ (2,000)	-9.09%
Administrative Salary Contingency	001.400.1210.9.9.002.640.5	\$ -	-	\$ 25,894	\$ -	-	25,894	\$ -	-	\$ 25,894	-	\$ 32,628	\$ 6,735	26.01%
<b>Total</b>		<b>\$ 343,626</b>	<b>2.00</b>	<b>\$ 399,015</b>	<b>\$ 329,062</b>	<b>2.00</b>	<b>404,426</b>	<b>\$ 342,254</b>	<b>2.00</b>	<b>\$ 404,804</b>	<b>2.00</b>	<b>\$ 439,101</b>	<b>\$ 34,297</b>	<b>8.47%</b>

## *Business Office*

*Vincent Leone, Assistant Superintendent of Finance & Administration*

The role of the Business Office is to support the District's finances, operations, and administrative functions. This includes accounts receivable, accounts payable, payroll, accounting, finance, human resources, and the treasury functions of the District.

The Business Office budget includes the salaries and expenses of the Accounts Payable Administrator, Payroll Administrator, District Accountant, District Treasurer, Director of Human Resources, Administrative Assistant to the Assistant Superintendent of Finance and Administration, and the Assistant Superintendent of Finance and Administration. Additional positions listed in this section but fall outside of the Business Office include our Family & Community Engagement Liaison as well as our School Resource Officer which we contract through the Hamilton Police Department.

FY24 has been a busy year for the Business Office as we welcomed a brand-new District Accountant and searched for a new Administrative Assistant to the Assistant Superintendent of Finance and Administration. The office is hoping to initiate a cross training phase to help prevent efficiency loss from the continuous turnover in staff.

The FY25 budget cycle came with its challenges. The office and district are facing high inflation costs as well as pressure on salary increases to stay competitive. For the Business Office Budget specifically, FY25 saw another budget year of reclassification of administrative back-end software and applications that were previously classified as instructional software. This represented a 33% increase in software however, this is not an increase to the budget as a whole, but rather a reclassification from one spot to another. Also, with the continuation of universal free lunch, the District is anticipating no longer needing reserve funds to bail out a historically deficit-running cafeteria program. This alone resulted in a \$50K savings.

As for the Districtwide Total Operating Budget, for the last completed fiscal year ending June 30, 2023, the District performed well financially. For the revenue side of the budget, the District performed exceptionally well taking in \$687K in additional revenues or an additional 16.47%. Most of the increase in revenues was generated from additional Chapter 70 & 71 payments from the state and additional interest earned on our bank account due to the rise in interest rates.

The fiscal year ending June 30, 2023, from the expense side also performed well financially. The District in total underspent the FY23 Operating Expense Budget by \$2M while also receiving an additional \$438K in expense offsets. The main drivers of this residual balance at year end included ~\$600K in salary funds from nearly 14 vacant positions that remained vacant for nearly the entire year, ~\$400K in health insurance premium rate savings and savings resulting from not paying for coverage for some of those 14 vacant positions mentioned, ~\$100K for our transportation contract coming in lower than anticipated, and ~\$100K from turnover in staff.

In the end, for FY23 the District's Excess and Deficiency (E&D) was certified by the state and resulted in \$2,302,308 being incorporated as revenue in the FY25 Budget. Since E&D is considered a one-time non-reoccurring revenue source, best practice recommends utilizing those funds towards one-time non-reoccurring expenses. For the FY25 Budget, we are utilizing E&D in five different ways that are discussed

throughout this document. In summary, \$773,064 is being returned to the taxpayers in the form of a reduced FY25 assessment. Meaning, our final FY25 assessment to the towns is being reduced by \$773,064 - ultimately reducing the increase in residents year-over-year property tax. \$494,623 is being placed in our OPEB Trust Fund while another \$494,622 is being placed in our Capital Stabilization Fund. \$315,000 is being used to fund the last phase of our 3-year districtwide SMART Board replacement project. Once completed, every classroom across all five schools will be outfitted with a new instructional SMART Board to help facilitate learning. Last, \$225,000 of E&D will be used to make upgrades to the Buker Elementary School or to replace aging equipment across the District.

Finally, for FY25 the Business Office will be responsible for the disbursement of approximately \$25.3M in gross salaries to approximately 300 permanent employees and another \$19.2M in non-salaries to approximately 1,140 different vendors annually.

Hamilton-Wenham Central Office Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Business Office</b>														
Affiliations/Conferences Business Off	001.400.1410.0.9.000.600.5	\$ 400	-	\$ 5,500	\$ 6,414	-	5,500	\$ 5,500	-	\$ 5,500	-	\$ 5,500	\$ -	0.00%
Rental/Lease Equipment	001.400.1410.9.9.000.620.5	\$ 5,470	-	\$ 9,646	\$ 6,083	-	9,646	\$ 5,989	-	\$ 9,646	-	\$ 9,646	\$ -	0.00%
Sal Prof Bus & Fin Asst. Supt	001.400.1410.9.9.026.100.5	\$ 147,900	1.00	\$ 153,077	\$ 153,577	1.00	156,139	\$ 153,577	1.00	\$ 159,885	1.00	\$ 164,079	\$ 4,194	2.62%
Sal Cler Business and Finance	001.400.1410.9.9.026.200.5	\$ 257,958	4.40	\$ 352,981	\$ 253,605	3.80	308,978	\$ 295,659	1.00	\$ 62,424	1.00	\$ 64,297	\$ 1,873	3.00%
Sal Other Business and Finance	001.400.1410.9.9.026.300.5	\$ -	-	\$ -	\$ -	-	-	\$ -	3.00	\$ 285,675	3.05	\$ 295,710	\$ 10,035	3.51%
Cont Serv Bus and Finance	001.400.1410.9.9.026.400.5	\$ 52,709	-	\$ 97,000	\$ 67,052	-	97,000	\$ 81,253	-	\$ 97,000	-	\$ 97,000	\$ -	0.00%
Exp Materials Bus and Fin	001.400.1410.9.9.026.500.5	\$ 19,358	-	\$ 20,000	\$ 8,873	-	25,000	\$ 13,735	-	\$ 25,000	-	\$ 25,000	\$ -	0.00%
Central Office Furniture and Non Consumables	001.400.1410.9.9.026.520.5	\$ 775	-	\$ 17,000	\$ 1,933	-	15,000	\$ 14,560	-	\$ 15,000	-	\$ 15,000	\$ -	0.00%
Other Exp Bus and Fin	001.400.1410.9.9.026.600.5	\$ 4,578	-	\$ 5,000	\$ 3,784	-	5,000	\$ 7,635	-	\$ 5,000	-	\$ 5,000	\$ -	0.00%
Human Resources	001.400.1420.9.9.024.100.5	\$ 0	-	\$ -	\$ 6,500	1.00	100,215	\$ 105,495	1.00	\$ 110,635	1.00	\$ 123,518	\$ 12,883	11.64%
Human Resources Con. Serv.	001.400.1420.9.9.024.400.5	\$ 24,950	-	\$ 12,600	\$ -	-	5,000	\$ -	-	\$ 5,000	-	\$ -	\$ (5,000)	-100.00%
Human Resources Other Expenses	001.400.1420.9.9.024.600.5	\$ -	-	\$ 462	\$ 250	-	462	\$ 250	-	\$ 462	-	\$ 462	\$ -	0.00%
<b>Sub Total-Business</b>		\$ 514,097	5.40	\$ 673,265	\$ 508,073	5.80	727,940	\$ 683,653	6.00	\$ 781,227	6.05	\$ 805,212	\$ 23,985	3.07%
<b>Other Office Expenses</b>														
PD-Office Personnel Salary	001.400.1410.9.9.099.300.5	\$ 2,750	-	\$ 9,000	\$ 1,500	-	9,000	\$ 1,280	-	\$ 9,000	-	\$ 9,000	\$ -	0.00%
PD-Office Personnel	001.400.1410.9.9.099.600.5	\$ 3,980	-	\$ 9,000	\$ 4,230	-	9,000	\$ 4,285	-	\$ 9,000	-	\$ 9,000	\$ -	0.00%
Admin Tech Cont Serv	001.400.1450.9.9.027.400.5	\$ 60,326	-	\$ 159,419	\$ 214,299	-	171,007	\$ 219,591	-	\$ 227,392	-	\$ 303,051	\$ 75,659	33.27%
<b>Sub Total</b>		\$ 67,056	-	\$ 177,419	\$ 220,029	-	189,007	\$ 225,156	-	\$ 245,392	-	\$ 321,051	\$ 75,659	30.83%
<b>Pupil Services</b>														
Interpreter Services	001.400.3100.9.9.084.400.5	\$ 179	-	\$ -	\$ 665	-	1,500	\$ 1,106	-	\$ 1,500	-	\$ 1,500	\$ -	0.00%
Family & Community Engagement Liaison	001.400.3100.9.9.097.100.5	\$ 16,907	-	\$ -	\$ 63,740	0.77	64,505	\$ 64,505	0.77	\$ 65,796	0.77	\$ 67,770	\$ 1,974	3.00%
Personal Protective Equipment	001.400.3200.1.9.042.500.5	\$ 7,771	-	\$ -	\$ 2,169	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
District Physician/Nurse Other Salaries	001.400.3200.9.9.042.300.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 2,100	\$ 2,100	0.00%
District Physician/Nurse Con. Serv.	001.400.3200.9.9.042.400.5	\$ -	-	\$ 2,500	\$ -	-	2,500	\$ 180	-	\$ 3,500	-	\$ 3,500	\$ -	0.00%
District-Wide Student Scholarships	001.400.3520.9.9.099.600.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 10,000	\$ 10,000	0.00%
SRO	001.400.3600.9.9.000.400.5	\$ 58,598	-	\$ 56,881	\$ 59,877	-	60,965	\$ 65,147	-	\$ 65,147	-	\$ 69,115	\$ 3,967	6.09%
Food Services	001.400.3400.9.9.080.300.5	\$ 157,261	-	\$ 70,000	\$ 5,000	-	50,000	\$ -	-	\$ 50,000	-	\$ -	\$ (50,000)	-100.00%
<b>Sub Total</b>		\$ 240,715	-	\$ 129,381	\$ 131,451	0.77	179,470	\$ 130,939	0.77	\$ 185,943	0.77	\$ 153,985	\$ (31,959)	-17.19%
<b>Transportation</b>														
Student Transportation Coordinator	001.400.3300.9.9.099.100.5	\$ -	-	\$ 5,504	\$ -	-	5,615	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Student Transportation-Regular Ed	001.400.3300.1.9.099.410.5	\$ 810,980	-	\$ 890,690	\$ 872,326	-	908,504	\$ 985,292	-	\$ 1,031,814	-	\$ 1,065,624	\$ 33,810	3.28%
<b>Sub Total</b>		\$ 810,980	-	\$ 896,194	\$ 872,326	-	914,119	\$ 985,292	-	\$ 1,031,814	-	\$ 1,065,624	\$ 33,810	3.28%
<b>Out of District Tuition</b>														
School Choice OUT	001.400.9110.1.3.099.400.5	\$ 123,694	-	\$ 160,476	\$ 108,948	-	160,476	\$ 140,963	-	\$ 160,476	-	\$ 155,000	\$ (5,476)	-3.41%
<b>Sub Total</b>		\$ 123,694	-	\$ 160,476	\$ 108,948	-	160,476	\$ 140,963	-	\$ 160,476	-	\$ 155,000	\$ (5,476)	-3.41%
<b>Business Office Total</b>		\$ 1,756,542	5.40	\$ 2,036,735	\$ 1,840,828	6.57	2,171,012	\$2,166,003	6.77	\$ 2,404,853	6.82	\$ 2,500,872	\$ 96,019	16.58%

## Curriculum, Assessment, and Instruction

### Jennifer Clifford, Director of Teaching & Learning

The FY25 Budget continues to incorporate a full-time 1.0FTE Districtwide Director of Teaching & Learning. The continued focus of the Teaching and Learning Office in FY25 will be to strengthen the structures of Multi-Tiered Systems of Support across all levels. The continued use of literacy and math screening assessments for kindergarten through ninth grade students will be used to evolve targeted interventions for students in need of support or extension. At the elementary level, a focus on the implementation of high-quality instructional mathematics materials in all classrooms will be our primary focus. Similarly, implementation support is planned for new middle school literacy and high school math instructional resources. Professional development opportunities will aim to strengthen best practices in literacy and math instruction to ensure success for all students.

Hamilton-Wenham Central Office Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Curriculum and Instruction</b>														
Elementary Curriculum Coordinator	001.400.2110.9.1.088.100.5	\$ -	0.35	\$ 45,345	\$ 53,268	0.50	73,950	\$ 71,038	0.50	\$ 72,459	0.50	\$ 74,633	\$ 2,174	3.00%
Secondary Curriculum Coordinator	001.400.2110.9.3.088.100.5	\$ -	0.25	\$ 38,064	\$ 9,618	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
C & I Other Expenses	001.400.2110.9.9.027.600.5	\$ 1,474	-	\$ 1,456	\$ 1,532	-	1,456	\$ 892	-	\$ 1,500	-	\$ 4,200	\$ 2,700	180.00%
Sal Clerical C and I	001.400.2110.9.9.073.200.5	\$ 39,936	1.00	\$ 54,155	\$ -	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
EXP Mat C & I Dept.	001.400.2110.9.9.073.500.5	\$ -	-	\$ 600	\$ 20	-	600	\$ 220	-	\$ -	-	\$ -	\$ -	0.00%
Affiliations/Memberships -C&I	001.400.2110.9.9.073.690.5	\$ -	-	\$ 2,179	\$ -	-	2,179	\$ 1,050	-	\$ 2,179	-	\$ 2,179	\$ -	0.00%
C & I Travel & Other Expenses	001.400.2110.9.9.089.601.5	\$ -	-	\$ 350	\$ 1,199	-	350	\$ 958	-	\$ 1,350	-	\$ 1,350	\$ -	0.00%
Elementary Reading Specialist	001.400.2310.1.1.099.100.5	\$ -	1.00	\$ 86,549	\$ 114,460	1.00	90,046	\$ 90,046	1.00	\$ 91,401	1.00	\$ 100,682	\$ 9,282	10.15%
District Extended Responsibilities	001.400.2315.9.9.029.160.5	\$ 12,912	-	\$ 47,704	\$ 56,900	-	56,315	\$ 41,205	-	\$ 62,741	-	\$ 70,490	\$ 7,749	12.35%
Curriculum Coordinators	001.400.2315.9.9.099.100.5	\$ 0	-	\$ -	\$ -	-	-	\$ 499	-	\$ -	-	\$ -	\$ -	0.00%
Elementary PD Coordinator	001.400.2351.9.1.073.100.5	\$ -	0.35	\$ 45,345	\$ 52,768	0.50	73,950	\$ 71,038	0.50	\$ 72,459	0.50	\$ 74,633	\$ 2,174	3.00%
Secondary PD Coordinator	001.400.2351.9.3.073.100.5	\$ -	0.25	\$ 38,064	\$ 9,618	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Summer WKSP C & I Salaries	001.400.2353.9.9.089.100.5	\$ 41,683	-	\$ 25,250	\$ 22,043	-	30,000	\$ 22,523	-	\$ 30,000	-	\$ 30,000	\$ -	0.00%
C & I TA Wednesday Salaries	001.400.2353.9.9.099.300.5	\$ -	-	\$ 5,000	\$ 3,622	-	8,339	\$ 2,060	-	\$ 8,339	-	\$ 8,339	\$ -	0.00%
Substitutes Salary P/D	001.400.2355.9.9.092.300.5	\$ 1,306	-	\$ 35,000	\$ 2,400	-	35,000	\$ 440	-	\$ 25,000	-	\$ 15,000	\$ (10,000)	-40.00%
Prof Dev C & I	001.400.2357.9.9.073.600.5	\$ 14,062	-	\$ 43,056	\$ 28,804	-	43,056	\$ 25,321	-	\$ 40,000	-	\$ 40,000	\$ -	0.00%
PD C & I Contracted Services	001.400.2357.9.9.088.400.5	\$ 5,600	-	\$ 13,590	\$ 4,500	-	13,590	\$ 900	-	\$ 7,500	-	\$ 7,500	\$ -	0.00%
Exp Materials for PD	001.400.2357.9.9.099.500.5	\$ -	-	\$ 3,300	\$ 1,936	-	3,300	\$ 3,317	-	\$ 3,300	-	\$ 3,300	\$ -	0.00%
PD Course Reimb-Teachers	001.400.2357.9.9.099.603.5	\$ 50,000	-	\$ 50,000	\$ 50,000	-	50,000	\$ 50,000	-	\$ 50,000	-	\$ 50,000	\$ -	0.00%
PD Course Reimb-Teachers Assnts.	001.400.2357.9.9.099.604.5	\$ 6,000	-	\$ 6,000	\$ 6,000	-	6,000	\$ 6,000	-	\$ 6,000	-	\$ 15,000	\$ 9,000	150.00%
Textbooks C&I	001.400.2410.9.9.073.500.5	\$ -	-	\$ 6,000	\$ 6,795	-	6,000	\$ 5,966	-	\$ -	-	\$ -	\$ -	0.00%
Testing and Assessment Other Exp.	001.400.2720.9.9.099.600.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 9,200	\$ 9,200	0.00%
Other Instructional Services	001.400.2440.1.9.010.400.5	\$ -	-	\$ -	\$ 34,179	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
<b>Sub Total</b>		\$ 172,972	3.20	\$ 547,007	\$ 459,661	2.00	494,131	\$ 393,472	2.00	\$ 474,228	2.00	\$ 506,506	\$ 32,278	6.81%
<b>Section 504</b>														
504/Home/Hospital Tutor Aide Salary	001.400.2330.9.9.099.300.5	\$ -	-	\$ 3,000	\$ 62	-	3,000	\$ -	-	\$ 3,000	-	\$ -	\$ (3,000)	-100.00%
504/Home/Hospital Cont. Services	001.400.2330.9.9.099.400.5	\$ 10,687	-	\$ 3,500	\$ 4,760	-	10,901	\$ -	-	\$ 10,901	-	\$ -	\$ (10,901)	-100.00%
504/Home/Hospital Instructional Equipment	001.400.2420.1.9.099.610.5	\$ -	-	\$ 500	\$ 915	-	500	\$ -	-	\$ 500	-	\$ 1,000	\$ 500	100.00%
504/Home/Hospital Cont. Services	001.400.2440.9.9.099.400.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 9,000	\$ 9,000	0.00%
<b>Sub Total</b>		\$ 10,687	-	\$ 7,000	\$ 5,737	-	14,401	\$ -	-	\$ 14,401	-	\$ 10,000	\$ (4,401)	-30.56%
<b>Substitute Salaries</b>														
LT Substitute Salary	001.400.2324.9.9.092.300.5	\$ -	-	\$ -	\$ 21,450	-	-	\$ 129,065	-	\$ 103,668	-	\$ 132,937	\$ 29,269	28.23%
Daily Substitute Salary	001.400.2325.9.9.092.300.5	\$ 424,465	-	\$ 283,012	\$ 242,880	-	339,615	\$ 230,190	-	\$ 235,947	-	\$ 244,001	\$ 8,054	3.41%
<b>Sub Total</b>		\$ 424,465	-	\$ 283,012	\$ 264,330	-	339,615	\$ 359,254	-	\$ 339,615	-	\$ 376,938	\$ 37,323	10.99%
<b>ELL (English Language Educators)</b>														
ELL Eval Salary/Stipends	001.400.2330.9.9.046.300.5	\$ 32,475	0.98	\$ 61,560	\$ 42,108	0.66	47,880	\$ 23,485	0.95	\$ 48,838	-	\$ -	\$ (48,838)	-100.00%
ELL Teacher	001.400.2305.9.9.046.100.5	\$ -	-	\$ -	\$ -	1.00	84,917	\$ 37,057	1.00	\$ 90,094	-	\$ -	\$ (90,094)	-100.00%
ELL Textbooks/Curriculum Materials	001.400.2410.9.9.046.500.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 5,000	\$ 5,000	0.00%
ELL Software	001.400.2455.9.9.046.600.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ 2,000	\$ 2,000	0.00%
ELL Supplies	001.400.2430.1.9.046.500.5	\$ 243	-	\$ 2,500	\$ 553	-	2,500	\$ 1,818	-	\$ 2,500	-	\$ 2,500	\$ -	0.00%
<b>Sub Total</b>		\$ 32,718	0.98	\$ 64,060	\$ 42,660	1.66	135,297	\$ 62,360	1.95	\$ 141,432	-	\$ 9,500	\$ (131,932)	-93.28%
<b>Guidance K-12</b>														
Guidance K-12 Salaries	001.400.2710.9.9.041.100.5	\$ 115,335	1.00	\$ 115,336	\$ 118,143	1.00	119,996	\$ 119,996	1.00	\$ 122,396	1.00	\$ 126,072	\$ 3,676	3.00%
<b>Sub Total</b>		\$ 115,335	1.00	\$ 115,336	\$ 118,143	1.00	119,996	\$ 119,996	1.00	\$ 122,396	1.00	\$ 126,072	\$ 3,676	3.00%
<b>Curriculum Total</b>		\$ 756,177	5.18	\$ 1,016,415	\$ 890,531	4.66	1,103,439	\$ 935,082	4.95	\$ 1,092,071	3.00	\$ 1,029,016	\$ (63,055)	-103.04%

## District Facilities, Maintenance, and Operations

Thomas Geary III, Director of Facilities, Maintenance & Operations

The Facilities, Maintenance, and Operations team serves the needs of the District's 6 Buildings containing 364,000 square feet of interior learning environments including general classrooms, specialized therapeutic spaces, physical education space, office space, kitchens, and many other interior spaces. The team also serves the needs of the District's exterior sites which include nearly 100 acres of exterior learning environments including athletic fields, play equipment areas, courtyards, project adventure courses, and other general landscaped areas. The average age of our Elementary Schools is 69 years old, with Cutler originally being constructed in 1952, Buker in 1953, and Winthrop in 1959. Improvement projects throughout the years have added classrooms and other key infrastructure upgrades. Our Miles River Middle School was constructed in 1999 and our Regional High School was constructed in 1960 with a major renovation being performed at the time of the Middle School construction.

The FY25 District Maintenance budget includes the salaries and expenses for the Director of Facilities, Maintenance, and Operations (1.0 FTE), our Maintenance Staff (2.0 FTE), a part-time Secretary (0.25 FTE), overtime expenses for all maintenance, custodial staff, substitute custodians, and student workers in the District. Maintenance and utility costs associated with District-wide programs and the Central Administration Building are also included in the District Maintenance budget. School-specific Facility, Maintenance, and Operations costs including custodial personnel, custodial supplies, utilities, annual repair costs, and annual maintenance costs (both recurring and non-recurring) are included in the Operating Budgets for each respective school. In FY25 the Facilities, Custodial, and Maintenance Team will continue to provide a high level of service and support to the entire community. Collaboration between town officials and departments, school staff, community members, and students shall continue.

District Maintenance Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Maintenance Admin/DW Custodial</b>														
Maint Director Affiliations/Memberships	001.400.4110.0.9.000.600.5	\$ -	-	\$ 1,920	\$ 753	-	1,920	\$ -	-	\$ 1,920	-	\$ 1,920	\$ -	0.00%
DW Floating Custodian	001.400.4110.9.9.099.300.5	\$ -	-	\$ -	\$ -	-	-	\$ 19,707	1.00	\$ 54,622	-	\$ -	\$ (54,622)	-100.00%
Summer Help Salary	001.400.4110.9.9.099.320.5	\$ 13,256	-	\$ 28,091	\$ 19,472	-	28,091	\$ 22,568	-	\$ 29,495	-	\$ 29,495	\$ -	0.00%
Sub Custodian Salary	001.400.4110.9.9.090.320.5	\$ 47,529	-	\$ 51,000	\$ 104,612	-	76,100	\$ 51,565	-	\$ 77,622	-	\$ 77,622	\$ -	0.00%
Salary Maintenance Director & Staff	001.400.4110.9.9.000.100.5	\$ 122,400	1.00	\$ 122,400	\$ 125,348	1.00	127,345	\$ 127,345	1.00	\$ 129,892	1.00	\$ 133,789	\$ 3,897	3.00%
Salary/Clerical Facilities	001.400.4110.9.9.000.200.5	\$ 11,714	0.25	\$ 11,949	\$ 12,188	0.25	12,680	\$ 12,679	0.25	\$ 13,127	0.25	\$ 13,589	\$ 462	3.52%
Custodial OT Salary	001.400.4110.9.9.000.320.5	\$ 66,890	-	\$ 18,850	\$ 54,938	-	48,227	\$ 32,565	-	\$ 49,192	-	\$ 49,192	\$ -	0.00%
Custodial Other Expense	001.400.4110.9.9.000.600.5	\$ 3,967	-	\$ 3,950	\$ 4,147	-	4,165	\$ 3,702	-	\$ 4,795	-	\$ 4,795	\$ -	0.00%
<b>Sub Total</b>		\$ 265,755	1.25	\$ 238,159	\$ 321,457	1.25	298,528	\$ 270,132	2.25	\$ 360,666	1.25	\$ 310,402	\$ (50,264)	-13.94%
<b>Utilities</b>														
District Gas Service	001.400.4120.9.9.000.670.5	\$ 13,826	-	\$ 14,023	\$ 15,945	-	14,656	\$ 12,956	-	\$ 17,540	-	\$ 17,540	\$ -	0.00%
District Electric	001.400.4130.9.9.000.650.5	\$ 8,558	-	\$ 11,177	\$ 7,995	-	11,177	\$ 8,640	-	\$ 12,294	-	\$ 12,294	\$ -	0.00%
District Telephone & Internet	001.400.4130.9.9.000.680.5	\$ 8,499	-	\$ 8,094	\$ 7,338	-	8,924	\$ 8,934	-	\$ 8,924	-	\$ 23,406	\$ 14,482	162.27%
District Water	001.400.4130.9.9.000.690.5	\$ 510	-	\$ 1,130	\$ 565	-	1,130	\$ 756	-	\$ 850	-	\$ 850	\$ -	0.00%
<b>Sub Total</b>		\$ 31,394	-	\$ 34,424	\$ 31,844	-	35,886	\$ 31,286	-	\$ 39,608	-	\$ 54,090	\$ 14,482	36.56%
<b>Maintenance</b>														
Maintenance Staff	001.400.4220.9.9.000.300.5	\$ 55,609	2.00	\$ 124,226	\$ 60,100	2.00	127,800	\$ 59,890	1.00	\$ 64,902	2.00	\$ 129,201	\$ 64,299	99.07%
Maintenance OT Salary	001.400.4220.9.9.000.320.5	\$ 4,150	-	\$ 20,400	\$ 17,156	-	15,400	\$ 32,968	-	\$ 15,708	-	\$ 15,708	\$ -	0.00%
Cont. Serv District Maintenance	001.400.4220.9.9.000.400.5	\$ 32,786	-	\$ 35,000	\$ 41,179	-	35,000	\$ 22,048	-	\$ 35,000	-	\$ 35,000	\$ -	0.00%
Cont. Serv District Repairs	001.400.4220.9.9.000.421.5	\$ 24,519	-	\$ 32,000	\$ 29,465	-	32,000	\$ 21,579	-	\$ 32,000	-	\$ 32,000	\$ -	0.00%
Cont. Serv Central Office Repairs	001.400.4220.9.9.099.421.5	\$ 6,464	-	\$ 18,500	\$ 9,977	-	18,500	\$ 3,410	-	\$ 18,500	-	\$ 18,500	\$ -	0.00%
Central Office Cust/Maint. Supplies	001.400.4220.9.9.099.500.5	\$ 4,671	-	\$ 5,000	\$ 4,170	-	5,000	\$ 2,885	-	\$ 5,000	-	\$ 5,000	\$ -	0.00%
District-Wide Maintenance Supplies	001.400.4220.9.9.099.520.5	\$ -	-	\$ 1,000	\$ 2,080	-	1,000	\$ 231	-	\$ 1,000	-	\$ 1,000	\$ -	0.00%
Building Security Other Expenses	001.400.4225.9.9.099.600.5	\$ 6,444	-	\$ 7,500	\$ 10,434	-	12,500	\$ 7,029	-	\$ 12,500	-	\$ 12,500	\$ -	0.00%
Maintenance of Equipment Cont. Serv.	001.400.4230.9.9.085.400.5	\$ -	-	\$ -	\$ 64,517	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Maintenance of Equipment Other Exp.	001.400.4230.9.9.085.600.5	\$ -	-	\$ -	\$ 6,494	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Extraordinary Maintenance	001.400.4300.9.9.099.400.5	\$ -	-	\$ -	\$ -	-	325,000	\$ 314,743	-	\$ -	-	\$ -	\$ -	0.00%
<b>Sub Total</b>		\$ 134,643	2.00	\$ 243,626	\$ 245,570	2.00	572,200	\$ 464,783	1.00	\$ 184,610	2.00	\$ 248,909	\$ 64,299	34.83%
<b>Operations/Maintenance Total</b>		\$ 431,792	3.25	\$ 516,208	\$ 598,871	3.25	906,614	\$ 766,202	3.25	\$ 584,884	3.25	\$ 613,401	\$ 28,517	4.88%

## Fringe Benefits

Vincent Leone, Assistant Superintendent of Finance & Administration

Fringe Benefits include the District's share of employee insurance coverage, including health and life insurance, as well as other payments for employee benefits including unemployment insurance and worker's compensation insurance. Fringe benefit costs for FY25 are budgeted at \$7.4M and represent 16.63% of the District's Total Operating Budget. Included in the \$7.4M budget is \$4.3M in health insurance, which represents the District's share (60%) of healthcare premium cost coverage & deductible for employees and their dependents, as well as for eligible retirees and their dependents.

The Fringe Benefits budget includes \$1.2M for our Essex Regional Retirement System (ERRS) Pension Liability payments. This annual payment represents the District's share of the liabilities related to the retirees collecting a pension from the retirement system. For the FY25 Budget, the Hamilton-Wenham Regional School District is responsible for approximately 2.35% of ERRS's annual liability which is up 0.13% from the prior assessment. This may not sound like a substantial change however, on a \$50.5M appropriation, represent a shift of \$66K on top of the normal year over year increase. In total, our Essex Retirement Appropriation increased \$133,948 or 12.74%.

Finally, the FY25 Budget includes \$250K in OPEB Trust Funding and an additional one-time infusion of \$494,623 to offset our Excess and Deficiency. The Business Office is very grateful for the approval of FY23's Operating Budget which included a \$2M investment in the Districts OPEB Fund. The funding over the three budget cycles has greatly increased our financial net position and has helped ensure funds are available to cover future healthcare costs for the next generation.

For more detail on our OPEB Trust Fund, please refer to the OPEB section of this annual report.

Benefits & Fixed Charges	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
403B Matching Funds	001.400.5100.9.9.000.401.5	\$ 39,500	-	\$ 47,100	\$ 36,475	-	53,831	\$ 40,450	-	\$ 53,831	-	\$ 50,000	\$ (3,831)	-7.12%
Cont Serv Retirement (Essex)	001.400.5100.9.9.000.410.5	\$1,048,965	-	\$1,076,094	\$1,076,094	-	1,067,859	\$ 1,049,214	-	\$ 1,051,200	-	\$ 1,185,148	\$ 133,948	12.74%
Cont Serv Medicare Tax	001.400.5100.9.9.000.490.5	\$ 289,093	-	\$ 315,454	\$ 281,744	-	321,763	\$ 347,757	-	\$ 321,763	-	\$ 345,353	\$ 23,590	7.33%
Cont Serv SS Tax	001.400.5100.9.9.000.491.5	\$ 52,681	-	\$ 62,712	\$ 48,696	-	63,966	\$ 49,814	-	\$ 63,966	-	\$ 60,000	\$ (3,966)	-6.20%
Sick Day Buy Back	001.400.5150.9.9.000.190.5	\$ 23,221	-	\$ 32,808	\$ 21,970	-	19,122	\$ 34,102	-	\$ 34,133	-	\$ 29,049	\$ (5,084)	-14.89%
Cont Serv Unemployment	001.400.5200.9.9.000.400.5	\$ 102,929	-	\$ 386,452	\$ 12,741	-	368,638	\$ 20,719	-	\$ 368,638	-	\$ 368,638	\$ -	0.00%
District Share Health Deductable	001.400.5200.9.9.000.480.5	\$ 37,334	-	\$ 61,195	\$ 61,426	-	61,195	\$ 70,206	-	\$ 65,426	-	\$ 65,426	\$ -	0.00%
Cont Serv Group Life INS	001.400.5200.9.9.000.481.5	\$ 5,909	-	\$ 8,000	\$ 5,454	-	8,000	\$ 5,020	-	\$ 8,000	-	\$ 7,000	\$ (1,000)	-12.50%
District Share Health INS	001.400.5200.9.9.000.482.5	\$2,090,331	-	\$2,589,019	\$2,167,261	-	2,657,317	\$ 2,368,414	-	\$ 2,799,541	-	\$ 3,130,254	\$ 330,713	11.81%
Cont Serv. Workmans Comp	001.400.5200.9.9.000.485.5	\$ 132,140	-	\$ 164,615	\$ 133,217	-	172,846	\$ 107,775	-	\$ 172,846	-	\$ 152,846	\$ (20,000)	-11.57%
Health Insurance - Food Services	001.400.5200.9.9.001.482.5	\$ 44,552	-	\$ 56,442	\$ 28,051	-	68,270	\$ 27,603	-	\$ 52,219	-	\$ 55,275	\$ 3,056	5.85%
Cont Serv. Retiree Life Insurance	001.400.5250.9.9.000.481.5	\$ 385	-	\$ 600	\$ 446	-	600	\$ 451	-	\$ 600	-	\$ 600	\$ -	0.00%
Cont Serv. Medicare Supp.	001.400.5250.9.9.000.483.5	\$ 540,371	-	\$ 567,548	\$ 561,455	-	609,242	\$ 589,162	-	\$ 623,706	-	\$ 672,159	\$ 48,453	7.77%
OPEB Trust Fund	001.400.5250.9.9.000.487.5	\$ -	-	\$ 100,000	\$ 100,000	-	2,150,000	\$ 2,150,000	-	\$ 200,000	-	\$ 744,622	\$ 544,622	272.31%
Cont Serv. Retiree's Full Plans	001.400.5250.9.9.001.483.5	\$ 192,638	-	\$ 307,194	\$ 223,181	-	341,797	\$ 252,635	-	\$ 284,563	-	\$ 375,822	\$ 91,259	32.07%
Property/Liability/Casualty/Sports Insurance	001.400.5260.9.9.000.484.5	\$ 123,154	-	\$ 110,471	\$ 107,478	-	139,164	\$ 124,712	-	\$ 139,164	-	\$ 139,164	\$ -	0.00%
Rental/Lease Equipment	001.400.5300.9.9.099.600.5	\$ 76,629	-	\$ 15,670	\$ 41,386	-	15,670	\$ 8,338	-	\$ 15,670	-	\$ 11,000	\$ (4,670)	-29.80%
Crossing Guards Salary	001.400.5550.1.9.099.350.5	\$ 7,004	0.86	\$ 25,650	\$ 11,331	0.86	27,000	\$ 10,095	0.86	\$ 27,540	0.52	\$ 17,528	\$ (10,012)	-36.35%
<b>Total</b>		<b>\$4,806,832</b>	<b>0.86</b>	<b>\$5,927,024</b>	<b>\$4,918,405</b>	<b>0.86</b>	<b>8,146,280</b>	<b>\$ 7,256,466</b>	<b>0.86</b>	<b>\$ 6,282,809</b>	<b>0.52</b>	<b>\$ 7,409,887</b>	<b>\$ 1,127,078</b>	<b>17.94%</b>

## Fixed Assets

During FY23 as discussed in the Business Office section, the District was overcome with vacant positions, and canceled orders because of supply chain issues, voided purchase orders from contractors that couldn't fulfill their labor obligations, excess funds from lower health insurance premiums and enrollment, and savings on our transportation contract. As a result, the District was left with a large surplus of funds. These excess funds fall to E&D as of June 30, 2023 and must be used in the FY25 budget cycle.

The District has many capital needs as our infrastructure is aging and much of our equipment is beyond its useful life. We were fortunate that the School Committee has made this a priority and dedicated much of the FY23 surplus to various capital projects across the District as well as funding for the Capital Stabilization Fund to help plan/defer future project costs.

Projects that will receive immediate attention in FY25 that are represented in the Capital Acquisition, Improvement and Replacement of Fixed Assets/Transfers DAC are the Smartboard replacement project that focuses on classroom projectors and learning boards to help better facilitate instruction. This represents the last year of a three-year project across the District. In addition, funds are being set aside for use in either one or all of the following areas, upgrades and/or renovations at the Buker Elementary School in anticipation of a new elementary building project, replacement of aging equipment across the District, and/or the purchase of a transportation van(s) for athletic and other student activity events.

Capital Acquisition, Improvement and Replacement of Fixed Assets/Transfers	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
Capital Stabilization Fund Transfer Out	001.400.7000.9.9.099.600.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$1,698,287	-	\$ 494,622	\$ (1,203,665)	-70.88%
Equipment & Furniture	001.400.7300.9.9.099.600.5	\$96,774	-	\$ -	\$ -	-	-	\$154,273	-	\$ -	-	\$ -	\$ -	0.00%
Capital Technology	001.400.7350.9.9.027.600.5	\$ -	-	\$ -	\$183,195	-	-	\$220,819	-	\$ 275,000	-	\$ 315,000	\$ 40,000	14.55%
Replacement of Equipment	001.400.7350.9.9.099.600.5	\$ -	-	\$ -	\$ -	-	-	\$ -	-	\$ 300,000	-	\$ 225,000	\$ (75,000)	-25.00%
<b>Total</b>		<b>\$96,774</b>	<b>-</b>	<b>\$ -</b>	<b>\$183,195</b>	<b>-</b>	<b>-</b>	<b>\$375,092</b>	<b>-</b>	<b>\$2,273,287</b>	<b>-</b>	<b>\$ 1,034,622</b>	<b>\$ (1,238,665)</b>	<b>-54.49%</b>



## ***Student Services Department***

***Special Education, Section 504, English Learner Education, McKinney-Vento, Homeless and Foster Care, Home/Hospital Tutoring***

***Stacy Bucyk, Director of Student Services, Title IX Coordinator, 504 Coordinator***

***Maureen Smith, Preschool and Elementary Special Education Coordinator***

***Theresa Fitzpatrick, Secondary Special Education Coordinator***

***Paige Menchini, CFCE Early Childhood Partners Coordinator and Preschool Peers Coordinator***

The Hamilton-Wenham Regional School District provides a continuum of services to meet the needs of ALL students. The Student Services Department provides district-wide oversight of Special Education (IDEA), Special Education Transportation, Section 504, Title IX, ELE (English Language Learner Education), CFCE Early Childhood Partners (Birth to Age 6), Home/Hospital Tutoring, Nursing, School Counseling, and educational oversight for students who are homeless or in foster care.

The district remains committed to providing high-quality special education and related services to students within the least restrictive environment. Student Services Department initiatives have focused on:

- supporting and strengthening our understanding and implementation of best instructional practices and methodologies to serve identified students;
- expanding programming and implementing processes and protocols to ensure compliance with state and federal regulations;
- and to consistently propose a budget that is programmatically and fiscally responsible, while allowing the district to meet the diverse needs of our students.

The district provides a continuum of individualized special education programming for students ages three through twenty-one identified as eligible for special education services and programming through a special education team process.

Related services (*speech and language therapy, occupational therapy, physical therapy, nursing, school counseling, the identification and implementation of assistive technology and augmentative communication support, transportation, orientation and mobility services, vision services, BCBA and ABA services, Teacher of the Deaf*) and academic supports, provided within push-in and pull-out models of service, are available at all grade levels. The Hamilton-Wenham Regional School District further provides specialized programs and services for students requiring a higher level of support and intensity of instruction in specific areas including academic, social, emotional, behavioral, foundational skills, life skills, and pre-vocational skills.

When the nature and/or severity of the student's disability is such that a less restrictive environment with the use of supplementary aids and services does not meet the student's needs, consideration is given to district-wide specialized programs and then to out-of-district placements. Out-of-district placements can range from students attending programs in other public schools, collaborative programs, approved private special education day schools as well as approved residential programs for students with significant needs.

The Hamilton-Wenham Regional School District is a member district of the Northshore Education Consortium (NSEC). Membership provides access to day-school programs and related services in the areas of vision, mobility, occupational therapy, physical therapy, behavioral supports, nursing, and mental health supports. Last year, the district began a partnership with NSEC to provide wrap-around community-based services and short-term case management for

students and families experiencing challenges, including mental health, through their Connections Wraparound Program. Support through NSEC Connections has continued this year.

**In-District Programs include:**

Programs	Location
Integrated Preschool	Winthrop School
Intensive Learning Program (ILP)	Winthrop School
Center for Academic and Social Learning (CASL)	Winthrop School
Therapeutic Learning Center (TLC)	Buker, Winthrop, MRMS*, HWRHS
Language-Based Learning Disabilities (LBDL)	Cutler, MRMS, HWRHS
Intensive Learning-Academic Skills (IL-AS)	MRMS, HWRHS
Academic Support-Learning Center and In-Class	All Schools
ELE Programming	Buker School, MRMS, HWRHS
Extended School Year (ESY)	Winthrop School (7/8/2024-8/8/2024), (7/8/2024-8/15/2024 for ILP)

*\*This year, the behavioral supports that have been in place at the Miles River Middle School are being aligned with the TLC programs at the elementary and high school levels.*

**District-Supported Early Childhood Programming:**

CFCE Early Childhood Partners

Early Childhood Partners CFCE provides free educational opportunities, advocacy, connections, and support for families and children ages Birth-6. Early Childhood Partners activities take place in Hamilton, Wenham, Manchester-By-The-Sea, and Essex. Early Childhood Partners is funded by the Massachusetts Coordinated Family & Community Engagement (CFCE) grant awarded to the Hamilton-Wenham Regional School District by the Massachusetts Department of Early Education and Care.

**Budget Impact:**

The FY25 budget allows the Student Services Department to maintain our English Language Education Program to include a full-time ESL teacher and a .5 ESL teacher. At the current time, we are providing ELE to 12 students across three schools. Further, the budget allows for necessary funds for staffing, contracted services, specialized materials, professional development, OOD tuitions and transportation.

The district is currently providing special education support to 353 students across the district, from age 3 through 21, including 40 students in out-of-district (OOD) placements.

The Student Services Department, when developing the budget, focuses on conservative budgeting and spending in the following ways:

- ongoing review of student populations and staffing needs;
- reallocation of funds and staffing, when possible, to meet individual student needs;
- and controlling expenditures through budget analysis.

Special Education Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Administration</b>														
Legal Settlements Con Serv	001.500.1435.2.9.091.450.5	\$ 82,913	-	\$ 70,000	\$ 46,531	-	70,000	\$ 20,611	-	\$ 62,000	-	\$ 62,000	\$ -	0.00%
Special Education Director Salary	001.500.2110.2.9.091.100.5	\$ 142,529	1.00	\$ 142,529	\$ 145,880	1.00	148,288	\$ 148,288	1.00	\$ 151,254	1.00	\$ 155,792	\$ 4,538	3.00%
Clerical Special Education Salary	001.500.2110.2.9.091.200.5	\$ 142,843	2.77	\$ 144,642	\$ 142,306	2.77	149,015	\$ 141,628	2.77	\$ 151,245	2.00	\$ 113,556	\$ (37,689)	-24.92%
Expl Materials--SP NDS SUPV	001.500.2110.2.9.091.500.5	\$ 4,624	-	\$ 3,000	\$ 4,593	-	4,000	\$ 7,193	-	\$ 4,500	-	\$ 6,300	\$ 1,800	40.00%
NON Exp Materials--SP Needs SUPV	001.500.2110.2.9.091.520.5	\$ 300	-	\$ 700	-	-	700	-	-	\$ 1,700	-	-	\$ (1,700)	-100.00%
Affiliations/Memberships	001.500.2110.2.9.091.600.5	\$ 450	-	\$ 4,174	\$ 1,339	-	4,174	\$ 1,411	-	\$ 2,674	-	\$ 2,674	\$ -	0.00%
Special Education Dept Chair Salary	001.500.2220.2.9.099.110.5	\$ -	-	\$ -	-	-	-	-	-	\$ -	-	\$ -	\$ -	0.00%
Special Education Elementary Coordinator	001.500.2315.2.1.099.100.5	\$ 112,591	1.00	\$ 116,987	\$ 115,343	1.60	176,955	\$ 117,140	1.00	\$ 119,483	1.00	\$ 123,068	\$ 3,585	3.00%
<b>Sub Total</b>		\$ 486,250	4.77	\$ 482,031	\$ 455,992	5.37	553,132	\$ 436,271	4.77	\$ 492,856	4.00	\$ 463,390	\$ (29,466)	-5.98%
<b>Out of District</b>														
Collaborative Membership	001.500.2110.2.9.091.480.5	\$ 10,000	-	\$ 15,500	\$ 20,000	-	21,500	\$ 10,000	-	\$ 21,500	-	\$ 21,500	\$ -	0.00%
Special Education State Assessment	001.500.9100.2.3.099.400.5	\$ -	-	\$ 17,457	-	-	17,457	-	-	\$ 17,457	-	\$ 17,457	\$ -	0.00%
Contracted Serv Other Public School	001.500.9100.2.9.099.400.5	\$ 51,490	-	\$ -	\$ 7,580	-	-	-	-	\$ -	-	\$ -	\$ -	0.00%
Contracted Serv Out-of-State School	001.500.9200.2.9.099.400.5	\$ 413,758	-	\$ 287,699	\$ 286,134	-	249,009	\$ 315,696	-	\$ 283,870	-	\$ 308,353	\$ 24,483	8.62%
Contracted Serv Privt Schools	001.500.9300.2.9.099.400.5	\$ 3,104,108	-	\$ 3,727,851	\$ 2,727,971	-	3,142,121	\$ 2,820,437	-	\$ 3,273,837	-	\$ 3,316,099	\$ 42,262	1.29%
Contracted Serv Collaboratives	001.500.9400.2.9.099.400.5	\$ 399,663	-	\$ 548,998	\$ 569,194	-	690,027	\$ 668,871	-	\$ 859,237	-	\$ 739,519	\$ (119,718)	-13.93%
<b>Sub Total</b>		\$ 3,979,019	-	\$ 4,597,506	\$ 3,610,878	-	4,120,114	\$ 3,815,004	-	\$ 4,455,901	-	\$ 4,402,928	\$ (52,973)	-1.19%
<b>Supplies/Materials/PD</b>														
EXP MATL TECH SUPV	001.500.2250.2.9.091.500.5	\$ 630	-	\$ 500	-	-	500	-	-	\$ 500	-	\$ 5,500	\$ 5,000	1000.00%
NON-EXP MATL TECH SUPV	001.500.2250.2.9.091.520.5	\$ 2,512	-	\$ 5,000	\$ 654	-	5,000	\$ 3,225	-	\$ 5,000	-	\$ -	\$ (5,000)	-100.00%
Inst. Staff to Attend PD/Memberships	001.500.2356.2.9.099.600.5	\$ -	-	\$ -	-	-	-	-	-	\$ -	-	\$ 28,000	\$ 28,000	0.00%
PD Special Education	001.500.2357.2.9.099.600.5	\$ 3,800	-	\$ 28,075	\$ 21,524	-	28,075	\$ 15,715	-	\$ 28,075	-	\$ -	\$ (28,075)	-100.00%
Curriculum and Instructional Materials	001.500.2410.2.9.091.500.5	\$ 9,394	-	\$ 12,418	\$ 13,867	-	12,418	\$ 16,910	-	\$ 12,418	-	\$ 15,000	\$ 2,582	20.79%
NON-EXP MATL SPEECH	001.500.2420.2.9.056.520.5	\$ -	-	\$ 750	\$ 612	-	750	\$ 968	-	\$ 750	-	\$ 750	\$ -	0.00%
OT/PT NON EXP Materials	001.500.2420.2.9.070.520.5	\$ 299	-	\$ 1,000	-	-	1,000	\$ 1,137	-	\$ 1,000	-	\$ 5,000	\$ 4,000	400.00%
Rental/Lease Equipment	001.500.2420.2.9.099.620.5	\$ 3,987	-	\$ 5,893	\$ 3,938	-	5,893	\$ 3,848	-	\$ 5,893	-	\$ 5,893	\$ -	0.00%
EXP Materials/Speech	001.500.2430.2.9.056.500.5	\$ 185	-	\$ 300	-	-	300	-	-	\$ 300	-	\$ 200	\$ (100)	-33.33%
OT/PT Supplies and Materials	001.500.2430.2.9.070.500.5	\$ -	-	\$ 700	-	-	700	\$ 723	-	\$ 700	-	\$ 700	\$ -	0.00%
Instructional Software Other Expenses	001.500.2455.2.9.099.600.5	\$ -	-	\$ -	-	-	-	\$ 5,845	-	\$ 8,000	-	\$ 8,000	\$ -	0.00%
Testing & Assessment Materials	001.500.2720.2.9.091.500.5	\$ 14,849	-	\$ 17,893	\$ 28,066	-	17,893	\$ 17,383	-	\$ 17,893	-	\$ 17,893	\$ -	0.00%
<b>Sub Total</b>		\$ 35,656	-	\$ 72,529	\$ 68,660	-	72,529	\$ 65,754	-	\$ 80,529	-	\$ 86,936	\$ 6,407	7.96%
<b>Summer Programs</b>														
Special Education Summer Prog Teacher Sa	001.500.2305.2.1.077.190.5	\$ 69,070	-	\$ 100,300	\$ 99,113	-	100,300	\$ 98,982	-	\$ 112,250	-	\$ 91,698	\$ (20,552)	-18.31%
Special Education Summer Medical/Therap	001.500.2320.2.1.077.400.5	\$ -	-	\$ -	-	-	-	-	-	\$ -	-	\$ 10,000	\$ 10,000	0.00%
Special Education Summer Prog ESP Salary	001.500.2330.2.1.077.390.5	\$ -	-	\$ -	-	-	-	-	-	\$ -	-	\$ 25,926	\$ 25,926	0.00%
Summer Program Contracted Services	001.500.2330.2.1.077.400.5	\$ 2,270	-	\$ 18,800	\$ 3,911	-	18,800	\$ 385	-	\$ 8,800	-	\$ -	\$ (8,800)	-100.00%
Special Education Summer Prog Tuition Co	001.500.2330.2.1.077.410.5	\$ -	-	\$ 5,760	\$ 375	-	5,760	-	-	\$ 5,760	-	\$ -	\$ (5,760)	-100.00%
Special Education Summer Prog Sup and M	001.500.2430.2.1.077.500.5	\$ 2,450	-	\$ 400	\$ 39	-	2,450	\$ 2,450	-	\$ 500	-	\$ 500	\$ -	0.00%
<b>Sub Total</b>		\$ 73,790	-	\$ 125,260	\$ 103,438	-	127,310	\$ 101,817	-	\$ 127,310	-	\$ 128,124	\$ 814	0.64%
<b>Prof. Salaries</b>														
Special Education Classroom Teachers Sala	001.500.2305.2.9.099.100.5	\$ 38,714	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Special Education DW Elem. Teacher Speci	001.500.2310.2.1.099.100.5	\$ -	-	\$ -	\$ -	-	-	\$ 61,484	-	\$ -	-	\$ -	\$ -	0.00%
Ext Day/Home Services/Tutoring Salary	001.500.2310.2.9.099.100.5	\$ 2,158	-	\$ 11,000	\$ 2,797	-	11,000	-	-	\$ 11,000	-	\$ 21,000	\$ 10,000	90.91%
Related Services OT, PT, SLP Salaries	001.500.2320.2.9.099.100.5	\$ 268,040	5.00	\$ 436,846	\$ 345,851	5.00	438,406	\$ 449,751	4.00	\$ 367,888	4.00	\$ 384,879	\$ 16,991	4.62%
Related Services Aides Salary	001.500.2330.2.9.070.300.5	\$ 29,712	0.67	\$ 29,712	\$ 31,508	0.67	30,912	\$ 31,379	0.67	\$ 32,232	-	\$ -	\$ (32,232)	-100.00%
Home Services/Tutoring Aides Salary	001.500.2330.2.9.093.300.5	\$ 3,449	-	\$ 50,000	\$ 1,746	-	50,000	-	-	\$ 50,000	-	\$ 5,000	\$ (45,000)	-90.00%
Special Education Instructional Travel	001.500.2440.2.9.500.600.5	\$ 85	-	\$ 1,000	\$ 451	-	1,000	\$ 39	-	\$ 1,000	-	\$ 650	\$ (350)	-35.00%
SAL Psychologists	001.500.2800.2.9.099.100.5	\$ 260,349	3.00	\$ 263,068	\$ 272,282	3.00	277,069	\$ 282,632	3.00	\$ 301,378	2.00	\$ 207,199	\$ (94,179)	-31.25%
<b>Sub Total</b>		\$ 602,507	8.67	\$ 791,626	\$ 654,636	8.67	808,387	\$ 825,285	7.67	\$ 763,498	6.00	\$ 618,727	\$ (144,770)	-18.96%
<b>Contracted Services</b>														
Special Education Contracted Services	001.500.2110.2.9.070.400.5	\$ 10,943	-	\$ 9,500	\$ 14,987	-	9,500	\$ 7,346	-	\$ 14,500	-	\$ 10,000	\$ (4,500)	-31.03%
Other Int. Serv.-Cont. Serv.	001.500.2440.2.9.500.400.5	\$ 5,528	-	\$ 15,000	\$ 9,117	-	15,000	\$ -	-	\$ 10,000	-	\$ 19,500	\$ 9,500	95.00%
Contracted Services	001.500.2320.2.9.070.400.5	\$ 183,766	-	\$ 94,549	\$ 159,266	-	94,549	\$ 177,610	-	\$ 94,549	-	\$ 94,549	\$ -	0.00%
<b>Sub Total</b>		\$ 200,237	-	\$ 119,049	\$ 183,370	-	119,049	\$ 184,956	-	\$ 119,049	-	\$ 124,049	\$ 5,000	4.20%
<b>Special Education Transportation</b>														
Student Transportation/Special Education	001.500.3300.2.9.099.400.5	\$ 433,308	-	\$ 786,412	\$ 682,273	-	761,747	\$ 787,345	-	\$ 1,086,093	-	\$ 949,445	\$ (136,648)	-12.58%
<b>Sub Total</b>		\$ 433,308	-	\$ 786,412	\$ 682,273	-	761,747	\$ 787,345	-	\$ 1,086,093	-	\$ 949,445	\$ (136,648)	-12.58%
<b>Utilities</b>														
Telephone Service	001.500.4130.2.9.099.680.5	\$ 3,282	-	\$ 3,367	\$ 2,995	-	3,446	\$ 2,762	-	\$ 3,446	-	\$ -	\$ (3,446)	-100.00%
<b>Sub Total</b>		\$ 3,282	-	\$ 3,367	\$ 2,995	-	3,446	\$ 2,762	-	\$ 3,446	-	\$ -	\$ (3,446)	-100.00%
<b>Total</b>		\$ 5,814,049	13.44	\$ 6,977,781	\$ 5,762,244	14.04	6,565,714	\$ 6,219,193	12.44	\$ 7,128,682	10.00	\$ 6,773,599	\$ (355,083)	-4.98%

## *Technology*

*Alan Taupier, Director of Technology*

The Information Technology Department of the District provides maintenance, technical assistance, and business continuity services to support the integration of technology in teaching, learning, and business operations. To achieve this goal, the IT Department invests in proven, stable, resilient, and cost-effective technologies. The department leverages these technologies to create a flexible set of tools that can adapt to the changing academic landscape, business operation goals, and cybersecurity threats.

To the mid-point of the 23-24 school year, the IT Department focused on lifecycle replacement, the continued integration of web-based assessment and learning platforms, and the installation and adoption of replacement audiovisual (AV) devices in the classroom.

We successfully redeployed or repurposed 250 iPads, Chromebooks and laptops. While deploying 63 new MacBook Airs to the Buker and Cutler teachers and 136 new Chromebooks to the Miles River 6th graders. The middle school 7th grade received 128 new iPads, the 1-to-1 devices that students will rely upon into their high school years. An additional 90 new iPads were deployed across elementary (30 at each school).

This past summer, the IT department embarked on the final phases of a multi-year audiovisual project to replace the aging and functionally obsolete classroom audiovisual systems. This project began with a district-wide teacher survey to gauge the project's direction. Followed by a focus group reviewing several audiovisual (A/V) vendor options. With the choices narrowed, each school trialed two different manufacturer configurations to determine which would best meet our needs. The chosen configuration is a Smart 85" 4K Ultra HD flat-panel interactive display, Redcat near-field voice amplification system, and HD document cameras. With the selection process behind us, in August, with FY23 funds, the first A/V installation began at Buker School and the Miles River School.

The IT Department is poised to begin a second round of interactive systems this winter to finish the deployment at the middle school and tackle the deployment at Cutler and Winthrop. The proposed FY25 IT budget includes funding for a high school A/V deployment before the 24/25 school year.

In FY25, lifecycle management will continue to be a significant part of the new school year, with new devices for teachers at Buker and Cutler and new student devices for the rising 6th and 7th grades, with replacement iPads and Chromebooks earmarked for the elementary school. These investments and the HS A/V will come to **\$505,700**.

We will continue to leverage our resources to streamline access to curated subscription services that enhance the student's learning experience while providing rich analytical performance data. Combined with our operational software and services subscriptions and licensing, the cost is **\$345,700 annually**.

This winter, a district-wide focus group will be assembled to review the District's Student Information System (SIS) and evaluate whether the District should pursue a new direction. The focus group's findings, the lifecycle replacement schedule, and other details will be the cornerstone of a multi-year technology plan.

Technology Programs	Account #	FY21 Actuals	FY22 FTE	FY22 Budget	FY22 Actuals	FY23 FTE	FY23 Budget	FY23 Actuals	FY24 FTE	FY24 Budget	FY25 FTE	FY25 Budget	Change FY24 \$	To FY25 %
<b>Administration</b>														
Tech Other Personnel Salary	001.400.2250.9.9.027.190.5	\$ 254,871	5.00	\$ 314,873	\$ 278,250	5.00	316,489	\$ 308,013	5.00	\$ 314,176	4.00	\$ 304,681	\$ (9,495)	-3.02%
Tech Travel	001.400.2250.9.9.027.601.5	\$ -	-	\$ 260	\$ 63	-	260	\$ 24	-	\$ 260	-	\$ 260	\$ -	0.00%
Tech Coord Salary	001.400.2250.9.9.099.100.5	\$ 133,756	1.00	\$ 133,756	\$ 136,932	1.00	139,161	\$ 139,161	1.00	\$ 141,945	1.00	\$ 146,204	\$ 4,259	3.00%
Exp Materials	001.400.2451.9.9.027.510.5	\$ 529	-	\$ 950	\$ 1,863	-	950	\$ 1,038	-	\$ 950	-	\$ 1,100	\$ 150	15.79%
Elementary Integrated Media Specialist	001.400.2310.1.1.027.100.5	\$ -	1.00	\$ 95,820	\$ 99,599	1.00	99,691	\$ 101,637	1.00	\$ 103,167	1.00	\$ 106,780	\$ 3,614	3.50%
<b>Sub Total</b>		<b>\$ 389,156</b>	<b>7.00</b>	<b>\$ 545,659</b>	<b>\$ 516,707</b>	<b>7.00</b>	<b>556,551</b>	<b>\$ 549,872</b>	<b>7.00</b>	<b>\$ 560,498</b>	<b>6.00</b>	<b>\$ 559,025</b>	<b>\$ (1,472)</b>	<b>-0.26%</b>
<b>Hardware</b>														
Instructional Hardware - Student/Staff Devices	001.400.2451.9.9.027.529.5	\$ 241,402	-	\$ 126,333	\$ 228,450	-	187,309	\$ 354,183	-	\$ 112,902	-	\$ 170,700	\$ 57,799	51.19%
Instructional Hardware - All Other	001.400.2453.9.9.027.529.5	\$ -	-	\$ 33,637	\$ 36,920	-	33,637	\$ 201,640	-	\$ 39,793	-	\$ 20,700	\$ (19,093)	-47.98%
Tech Infrastructure	001.400.4450.9.9.027.529.5	\$ 23,342	-	\$ 26,473	\$ 11,906	-	63,728	\$ 26,971	-	\$ 63,728	-	\$ 29,000	\$ (34,728)	-54.49%
<b>Sub Total</b>		<b>\$ 264,745</b>	<b>-</b>	<b>\$ 186,443</b>	<b>\$ 277,276</b>	<b>-</b>	<b>284,674</b>	<b>\$ 582,793</b>	<b>-</b>	<b>\$ 216,422</b>	<b>-</b>	<b>\$ 220,400</b>	<b>\$ 3,978</b>	<b>1.84%</b>
<b>Professional Development</b>														
Other Exp Tech Training	001.400.2451.9.9.027.600.5	\$ 4,395	-	\$ 15,100	\$ 3,789	-	15,100	\$ 12,972	-	\$ 15,100	-	\$ 15,100	\$ -	0.00%
<b>Sub Total</b>		<b>\$ 4,395</b>	<b>-</b>	<b>\$ 15,100</b>	<b>\$ 3,789</b>	<b>-</b>	<b>15,100</b>	<b>\$ 12,972</b>	<b>-</b>	<b>\$ 15,100</b>	<b>-</b>	<b>\$ 15,100</b>	<b>\$ -</b>	<b>0.00%</b>
<b>Contracted Service</b>														
Maintenance	001.400.2250.9.9.099.400.5	\$ 60,969	-	\$ 93,103	\$ 58,401	-	93,103	\$ 100,117	-	\$ 95,577	-	\$ 32,946	\$ (62,631)	-65.53%
<b>Sub Total</b>		<b>\$ 60,969</b>	<b>-</b>	<b>\$ 93,103</b>	<b>\$ 58,401</b>	<b>-</b>	<b>93,103</b>	<b>\$ 100,117</b>	<b>-</b>	<b>\$ 95,577</b>	<b>-</b>	<b>\$ 32,946</b>	<b>\$ (62,631)</b>	<b>-65.53%</b>
<b>Software</b>														
Technology Software	001.400.2451.9.9.027.400.5	\$ 136,529	-	\$ -	\$ -	-	-	\$ -	-	\$ -	-	\$ -	\$ -	0.00%
Instructional Software	001.400.2455.9.9.027.400.5	\$ -	-	\$ 108,103	\$ 63,340	-	83,498	\$ 39,536	-	\$ 53,221	-	\$ 42,649	\$ (10,572)	-19.86%
<b>Sub Total</b>		<b>\$ 136,529</b>	<b>-</b>	<b>\$ 108,103</b>	<b>\$ 63,340</b>	<b>-</b>	<b>83,498</b>	<b>\$ 39,536</b>	<b>-</b>	<b>\$ 53,221</b>	<b>-</b>	<b>\$ 42,649</b>	<b>\$ (10,572)</b>	<b>-19.86%</b>
<b>Total</b>		<b>\$ 855,794</b>	<b>7.00</b>	<b>\$ 948,408</b>	<b>\$ 919,513</b>	<b>7.00</b>	<b>1,032,926</b>	<b>\$1,285,290</b>	<b>7.00</b>	<b>\$ 940,817</b>	<b>6.00</b>	<b>\$ 870,120</b>	<b>\$ (70,697)</b>	<b>-7.51%</b>

## ***Key Indicators***

***Total District Enrollment***

***FY25 Staffing Summary by Accountability Student Demographics***

***2023 HWRSD Grade 10 MCAS Results***

***AP Score Reports 2018-2023***

***Class of 2023 Profile***

***HWRSD Five-Year Rolling Average***

***FY25 Staffing Summaries by DESE Category***

***FY25 Staffing Summary by Accountability Center***

***OPEB Trust Fund***

***Capital Stabilization Fund***

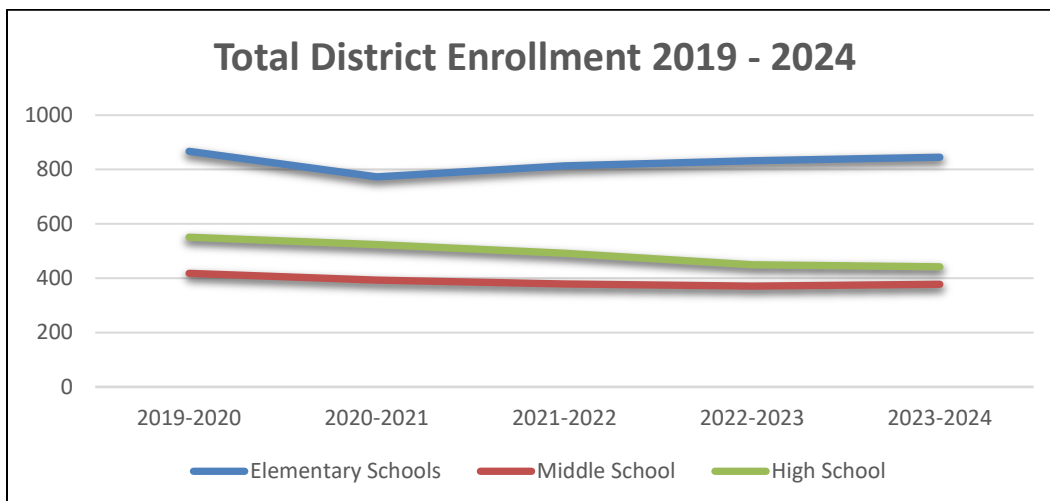
***HWRSD Capital Improvement Project Summary***



## Total District Enrollment

Hamilton-Wenham Regional School District, Total Student Enrollment, by School, by Grade (Includes Resident, Choice-In, PreK, OOD, and Tuition-In). There was a slight increase in overall student enrollment for the 2023-2024 School Year with the largest increase at the elementary level.

		2019-2020	2020-2021	2021-2022	2022-2023	2023-2024
		October	October	October	October	October
<b>ELEMENTARY</b>	<b>PK</b>	39	31	40	25	35
	<b>K</b>	145	122	141	136	131
	<b>1</b>	136	122	131	149	137
	<b>2</b>	150	122	121	129	154
	<b>3</b>	129	134	126	125	131
	<b>4</b>	127	122	138	128	122
	<b>5</b>	141	120	116	140	135
<b>TOTAL:</b>		867	773	813	832	845
<b>MRMS</b>	<b>6</b>	142	136	118	109	135
	<b>7</b>	139	127	132	128	116
	<b>8</b>	137	130	129	134	127
<b>TOTAL:</b>		418	393	379	371	378
<b>HWRHS</b>	<b>9</b>	134	124	114	106	117
	<b>10</b>	135	129	120	108	104
	<b>11</b>	143	131	126	119	104
	<b>12</b>	139	140	132	117	117
<b>TOTAL:</b>		551	524	492	450	442
<b>TOTAL ENROLLED:</b>		1836	1690	1684	1653	1665
OUT-OF-DISTRICT (PK-12 & BEYOND)		51	43	40	41	41
Non-Resident Tuitioned in (K-12) (included in Total Enroll)						1
PK TUITION-IN (included in Total Enrolled)		20	13	27	19	23
SCHOOL CHOICE-IN (included in Total Enrolled)		102	90	77	73	63
<b>TOTAL NOT INCLUDED IN TOTAL ENROLLED:</b>		51	43	40	41	41
<b>TOTAL (including OOD)</b>		1887	1733	1724	1694	1706



## District Demographics

Race/Ethnicity	District	State
Total # of Classes	962	477,621
Average Class Size	15.7	17.1
Number of Students	1,667	929,816
African American %	0.5	9.5
Asian %	4.3	7.3
Hispanic %	5.5	24.7
White %	86.9	53.8
Native American %	0	0.2
Native Hawaiian, Pacific Islander %	0.2	0.1
Multi-Race, Non-Hispanic %	2.7	4.4

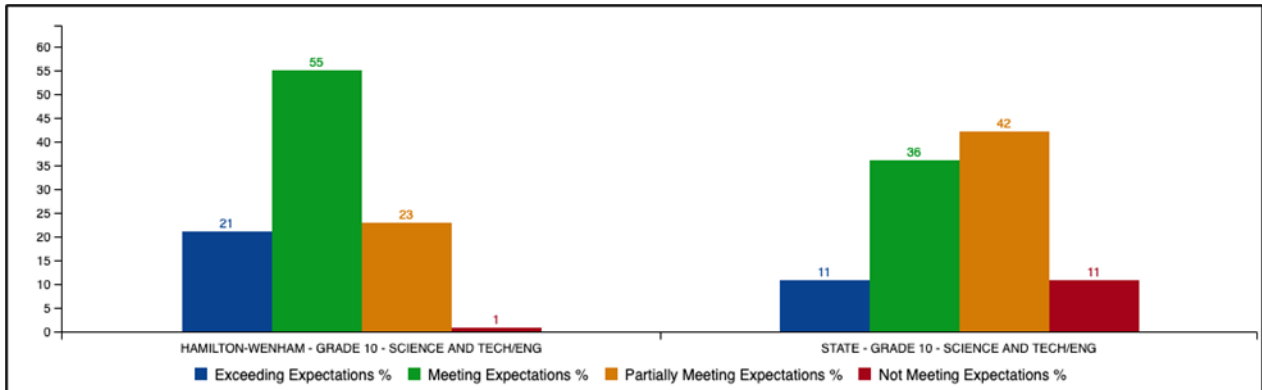
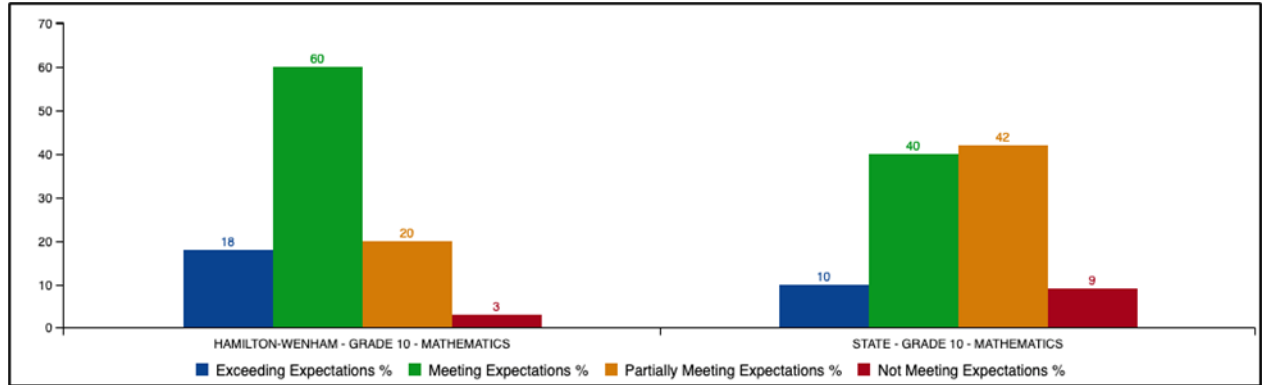
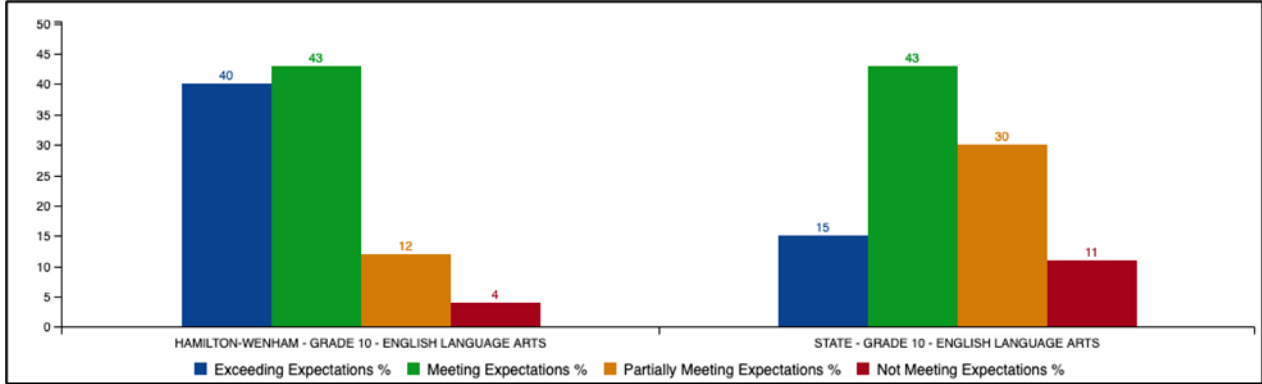
Title	% of District	% of State
First Language not English	2.9	26
English Language Learner	0.8	13.1
Low-income	8	42.2
Students With Disabilities	20.4	20.2
High Needs	26.3	55.8

Source: Mass DESE Website



## 2023 HWRSD Grade 10 MCAS Results

Provided are the most recent available Grade 10 MCAS results for 2023. MCAS tests are designed to measure student performance relative to meeting the standards for learning as they are laid out in the *Massachusetts Curriculum Frameworks* documents. Additionally, attaining the “Needs Improvement” level is a requirement for all students in Massachusetts to earn a high school diploma.



Source: Mass DESE Website

## AP Score Reports 2018-2023

Subject	Score Level	2018	2019	2020	2021	2022	2023
3-D Art and Design	1						
	2						
	3						
	4		1				1
	5						
Total Exams			1				1
Mean Score			4				4
Biology	1						
	2	9	4	3	2	3	2
	3	5	13	9	1	16	11
	4	10	12	14	2	12	1
	5	1	5	7		9	5
Total Exams		25	34	33	5	40	19
Mean Score		3.12	3.53	3.76	3	3.68	3.47
Calculus AB	1	1			2	3	
	2	8	3	1	1	6	1
	3	9	3	9	2	3	3
	4	2	5	6	4	4	5
	5	4	7	5		6	8
Total Exams		24	18	21	9	22	17
Mean Score		3	3.89	3.71	2.89	3.18	4.18
Calculus BC	1			1			
	2				1		
	3				1		
	4	1					1
	5		2	1	1		1
Total Exams		1	2	2	3		4.5
Mean Score		4	5	3	3.33		4.5
Calculus BC: AB Subscore	1						
	2				1		
	3						
	4				1		
	5	1	2		1		2
Total Exams		1	2		3		2
Mean Score		5	5		3.67		5
Chemistry	1		1			2	
	2	2	7	3	6	6	1
	3	9	18	6	7	8	10
	4	3	8	3	3	5	13
	5	7	5	1	1	2	4
Total Exams		21	39	13	17	23	28
Mean Score		3.71	3.23	3.15	2.94	2.96	3.71
Chinese Language and Culture	1						1
	2						
	3						
	4					1	
	5						1
Total Exams						1	2
Mean Score						4	3
Computer Science A	1	5	1	1	2	4	4
	2	6		1	1	4	
	3	3	2	3	1	3	2
	4	2	1	4		2	4
	5	2		6	2	2	1
Total Exams		18	4	15	6	15	11
Mean Score		2.44	2.75	3.87	2.83	2.6	2.82
Computer Science Principles	1						
	2						
	3						
	4		1				
	5						
Total Exams			1				
Mean Score			4				
English Language and Composition	1						
	2						
	3						
	4				1		
	5						
Total Exams					1		
Mean Score					4		

## AP Score Reports 2018-2023 (continued)

Subject	Score Level	2018	2019	2020	2021	2022	2023
English Literature and Composition	1						
	2		3		2		
	3	10	6	3	8	7	3
	4	12	5	17	3	9	8
	5	4	9	9	2	11	16
	Total Exams	26	23	29	15	27	27
Mean Score	3.77	3.87	4.21	3.33	4.15	4.48	
Environmental Science	1						
	2					1	
	3					1	2
	4					2	2
	5						
	Total Exams					4	4
Mean Score					3.25	3.5	
European History	1						
	2						
	3						
	4				2		
	5		1		1		
	Total Exams				3		
Mean Score		5		4.33			
German Language and Culture	1						
	2						
	3						
	4				1		1
	5						1
	Total Exams				1		2
Mean Score				4		4.5	
Human Geography	1						
	2	1					
	3	1		1			
	4						
	5						
	Total Exams	2		1			
Mean Score	2.5		3				
Macroeconomics	1	13	9		2	8	2
	2	7	12	1	2	5	7
	3	2	5	4	1	1	12
	4	4	4	4	2	4	6
	5	2	8	3	1	1	2
	Total Exams	28	38	12	8	19	29
Mean Score	2.11	2.74	3.75	2.75	2.21	2.97	
Microeconomics	1	9	7		1	7	1
	2	5	9	3	1	3	10
	3	6	5	5	3	3	6
	4	7	9	2	2	4	8
	5	1	8	3	2	2	3
	Total Exams	28	38	13	9	19	28
Mean Score	2.5	3.05	3.38	3.33	2.53	3.07	
Music Aural Subscore	1						
	2		1				
	3				1		
	4	1					
	5						1
	Total Exams	1	1		1		1
Mean Score	4	2		3		5	
Music Non-Aural Subscore	1						
	2	1			1		
	3		1				
	4						
	5						1
	Total Exams	1	1		1		1
Mean Score	2	3		2		5	
Music Theory	1						
	2		1				
	3	1			1		
	4						
	5						1
	Total Exams	1	1		1		1
Mean Score	3	2		3		5	

## AP Score Reports 2018-2023 (continued)

Subject	Score Level	2018	2019	2020	2021	2022	2023
Physics 1	1	2		2			1
	2	8		1	2	2	3
	3	10	5	3	2	1	4
	4	5	2	4	8	2	5
	5	3	4	2	2	6	3
	Total Exams	28	11	12	14	11	16
Mean Score	2.96	3.91	3.25	3.71	4.09	3.38	
Physics C: Electricity and Magnetism	1						
	2						
	3						
	4						
	5		1				1
	Total Exams		1				1
Mean Score		5				5	
Physics C: Mechanics	1						
	2						
	3						
	4						
	5		1				1
	Total Exams		1				1
Mean Score		5				5	
Psychology	1	11	21	7	28	15	7
	2	14	17	5	12	18	5
	3	7	19	12	8	13	21
	4	19	14	25	12	12	22
	5	2	4	9	4	4	5
	Total Exams	53	75	58	64	62	60
Mean Score	2.75	2.51	3.41	2.25	2.55	3.22	
Spanish Language and Culture	1						
	2				4		3
	3	10	10	3	19	9	14
	4	15	10	10	5	10	8
	5	9	9	5	3	7	4
	Total Exams	34	29	18	31	26	29
Mean Score	3.97	3.97	4.11	3.23	3.92	3.45	
Spanish Literature and Culture	1						
	2				1	1	
	3	10	4	10		6	9
	4	10	4		2	3	6
	5	2	4	3		1	6
	Total Exams	22	12	13	3	11	21
Mean Score	3.64	4	3.46	3.33	3.36	3.86	
Statistics	1	9	2		3	10	1
	2	12	8	2	3	5	3
	3	14	11	4	5	12	5
	4	13	3	3	4	10	5
	5	10	3		2	6	7
	Total Exams	58	27	9	17	43	21
Mean Score	3.05	2.89	3.11	2.94	2.93	3.67	
United States Government and Politics	1		1				
	2	1				1	
	3		1				1
	4	1		1			
	5						1
	Total Exams	2	2	1		1	2
Mean Score	3	2	4		2	4	
United States History	1						
	2	2	1		7	2	2
	3	4	3	1	2	4	5
	4	3	3		2	3	2
	5	3	5		1	3	2
	Total Exams	12	12	1	12	12	11
Mean Score	3.58	4	3	2.75	3.58	3.36	

## Class of 2023 Profile

Class of 2023 Statistics	
Students Graduated in 2023	117
AP Course Offerings	13
AP Students in 2022-2023	159
AP Exams Taken	332
AP Scores of 3 or above	84%
AP Scholar (3.22 avg. score)	23
AP Scholar with Honors (3.67 avg. score)	10
AP Scholar with Distinction (4.34 avg. score)	19
National AP Scholar	0

Average SAT Scores (Class of 2023)	HWRHS	MASS AVG.
Evidence Based R & W	617	560
Mathematics	590	551

Average ACT Scores (Class of 2023)	HWRHS	MASS AVG.
English	26.9	26.6
Math	25.2	25.6
Reading	27.3	27.3
Science	25.2	25.8
Composite	26.3	26.4
Participation	22 Students (Grades 11 - 12)	8%

### *HWRSD Five-Year Rolling Average*

The charts below were developed to convey the District’s rolling average for the past five budget cycles. The data represents the average “Net Operating Assessment” to the towns. The rolling average for the past five years is 4.56% while the FY24 Budget came in at a 2.63% increase, representing a 1.93% lower average Net Assessment.

	FY21 Budget	FY22 Budget	FY23 Budget	FY24 Budget	FY25 Budget
<b><u>Hamilton</u></b>					
Net Operating Budget	\$ 20,227,834	\$ 21,131,336	\$ 21,839,706	\$ 22,694,537	\$ 23,376,462
% Increase YoY	8.25%	4.47%	3.35%	3.91%	3.00%
<b>5 Year Average</b>					<b>4.60%</b>
<b>PRY 5 Year Average</b>					<b>5.06%</b>
<b><u>Wenham</u></b>					
Net Operating Budget	\$ 11,447,446	\$ 11,660,930	\$ 11,554,340	\$ 11,576,887	\$ 11,887,472
% Increase YoY	9.14%	1.86%	-0.91%	0.20%	2.68%
<b>5 Year Average</b>					<b>2.59%</b>
<b>PRY 5 Year Average</b>					<b>3.66%</b>
<b><u>Hamilton-Wenham RSD</u></b>					
Net Operating Budget	\$ 31,675,280	\$ 32,792,266	\$ 33,394,046	\$ 34,271,424	\$ 35,263,935
% Increase YoY	8.57%	3.53%	1.84%	2.63%	2.90%
<b>5 Year Average</b>					<b>3.89%</b>
<b>PRY 5 Year Average</b>					<b>4.56%</b>

## FY25 Staffing Summaries by DESE Category

DESE Category	Teacher CBA		FTE Increase/ (Decrease)	ESP CBA		FTE Increase/ (Decrease)	Office Personnel CBA		FTE Increase/ (Decrease)
	FY24	FY25		FY24	FY25		FY24	FY25	
Administration	-	-	-	-	-	-	1.00	1.00	-
Instructional Leadership	-	2.80	2.80	-	-	-	9.13	8.36	(0.77)
Teachers	153.60	151.10	(2.50)	-	-	-	-	-	-
Other Teaching Services	10.50	12.70	2.20	56.54	52.32	(4.22)	-	-	-
Professional Development	3.00	3.00	-	-	-	-	-	-	-
Inst. Materials, Equip., & Technology	-	-	-	-	-	-	-	-	-
Guidance, Counseling, Testing	14.00	12.00	(2.00)	-	-	-	0.78	0.78	-
Pupil Services	5.00	5.00	-	-	-	-	0.75	1.00	0.25
Operations & Maintenance	-	-	-	-	-	-	0.25	0.25	-
Benefits & Fixed Charges	-	-	-	-	-	-	-	-	-
Capital & Fixed Assets Improvements	-	-	-	-	-	-	-	-	-
Programs with Other School Districts	-	-	-	-	-	-	-	-	-
<b>Total:</b>	<b>186.10</b>	<b>186.60</b>	<b>0.50</b>	<b>56.54</b>	<b>52.32</b>	<b>(4.22)</b>	<b>11.91</b>	<b>11.39</b>	<b>(0.52)</b>

DESE Category	Custodian/Maint. CBA		FTE Increase/ (Decrease)	Administration		FTE Increase/ (Decrease)	All Other Positions		FTE Increase/ (Decrease)
	FY24	FY25		FY24	FY25		FY24	FY25	
Administration	-	-	-	7.00	7.05	0.05	0.04	0.04	-
Instructional Leadership	-	-	-	16.60	15.60	(1.00)	-	-	-
Teachers	-	-	-	-	-	-	-	-	-
Other Teaching Services	-	-	-	-	-	-	0.95	-	(0.95)
Professional Development	-	-	-	0.50	0.50	-	-	-	-
Inst. Materials, Equip., & Technology	-	-	-	-	-	-	-	-	-
Guidance, Counseling, Testing	-	-	-	1.00	1.00	-	-	-	-
Pupil Services	-	-	-	1.77	1.77	-	1.73	1.73	0.00
Operations & Maintenance	15.00	15.00	-	1.00	1.00	-	-	-	-
Benefits & Fixed Charges	-	-	-	-	-	-	0.86	-	(0.86)
Capital & Fixed Assets Improvements	-	-	-	-	-	-	-	-	-
Programs with Other School Districts	-	-	-	-	-	-	-	-	-
<b>Total:</b>	<b>15.00</b>	<b>15.00</b>	<b>-</b>	<b>27.87</b>	<b>26.92</b>	<b>(0.95)</b>	<b>3.58</b>	<b>1.77</b>	<b>(1.81)</b>

DESE Category	Total Positions		FTE Increase/ (Decrease)
	FY24	FY25	
Administration	8.04	8.09	0.05
Instructional Leadership	25.73	26.76	1.03
Teachers	153.60	151.10	(2.50)
Other Teaching Services	67.99	65.02	(2.97)
Professional Development	3.50	3.50	-
Inst. Materials, Equip., & Technology	-	-	-
Guidance, Counseling, Testing	15.78	13.78	(2.00)
Pupil Services	9.25	9.50	0.25
Operations & Maintenance	16.25	16.25	-
Benefits & Fixed Charges	0.86	0.52	(0.34)
Capital & Fixed Assets Improvements	-	-	-
Programs with Other School Districts	-	-	-
<b>Total:</b>	<b>301.00</b>	<b>294.52</b>	<b>(6.48)</b>

## FY25 Staffing Summaries by Accountability Center

Summary of Changes to Staffing By DAC			
<u>Buker Elementary School</u>			
ESL Teacher Reorganization	1.00		
Library Teacher	0.66		
Elementary Specialist Teacher Reorga	0.20		
ESP Elementary Reorganization	1.00		
Library ESP	<u>(0.61)</u>		
	2.25		
<u>Winthrop Elementary School</u>			
TLC Teacher	1.00		
Library Teacher	0.66		
Elementary Specialist Teacher Reorga	0.10		
PT Reorganization	0.20		
PreK ESP	0.80		
Library ESP	<u>(0.61)</u>		
ESP Elementary Reorganization	<u>0.50</u>		
	2.65		
<u>Regional High School &amp; Athletics</u>			
Curriculum Leader Reorganization	1.40		
Curriculum Leader Reorganization	<u>(2.00)</u>		
FY24 Planned Teacher Reduction	1.00		
FY24 ESL Teacher	0.25		
Guidance Counselor Reduction	<u>(0.50)</u>		
FY24 ESP Reduction	<u>(1.00)</u>		
FY25 Planned Teacher Reduction	<u>(1.60)</u>		
OP Realignment	<u>0.25</u>		
	<u>(2.20)</u>		
<u>Benefits &amp; Fixed Charges</u>			
Crossing Guards	<u>(0.34)</u>		
	<u>(0.34)</u>		
<u>Cutler Elementary School</u>			
Elementary Specialist Teacher Reorganization		(0.30)	
Library Teacher		0.66	
FY24 Teacher Trade in for ESPs		<u>(1.00)</u>	
Grade School Bubble Teacher		1.00	
Library ESP		<u>(0.61)</u>	
ESP Elementary Reorganization		<u>(3.00)</u>	
		<u>(3.25)</u>	
<u>Miles River Middle School</u>			
Curriculum Leader Reorganization		1.40	
Curriculum Leader Reorganization		<u>(0.80)</u>	
FY24 Planned Teacher Reduction		0.40	
FY25 Planned Teacher Reduction		<u>(1.00)</u>	
FY24 ESL Teacher		0.25	
Guidance Counselor Reduction		<u>(0.50)</u>	
		<u>(0.25)</u>	
<u>Central Office</u>			
FY24 ESL Teacher Reorganization		(1.00)	
FTE Recalculation		0.05	
FY24 ESL Tutor Reorganization		<u>(0.95)</u>	
		<u>(1.90)</u>	
<u>Special Education</u>			
Office Personnel		(0.79)	
Psychologist		<u>(1.00)</u>	
PT Reorganization		<u>(0.66)</u>	
OP Additional Days		<u>0.02</u>	
		<u>(2.43)</u>	
<u>Technology</u>			
Technician		<u>(1.00)</u>	
		<u>(1.00)</u>	
Total		<u>(6.48)</u>	
Percent of PRY Staffing Total		-2.15%	



## *OPEB Trust Fund*

OPEB stands for Other Post-Employment Benefits which, generally speaking, represents the liability associated with health insurance costs for current and future employees and retirees of the school district.

In February of 2022, the District established our OPEB Trust fund which is overseen by the state-run Pension Reserves Investment Management Board. That same year, within the District's FY22 Operating Budget was the first ever contribution to OPEB for the school system in the amount of \$100,000. Our current plan increases that amount by \$50,000 each year until our Essex Pension Liability is fully funded. At that stage, we will combine both amounts and contribute the total to OPEB until OPEB is fully funded. For the FY25 Budget, our base OPEB contribution is \$250,000.

The District was fortunate that the citizens voted to support our FY23 Budget two years ago which included a substantial investment into our OPEB Trust Fund of an additional \$2M to offset that current year's E&D on top of the \$150,000 already planned. Like FY23, and as discussed in the Business Office section, FY25 contains another offset to E&D of \$494,622 in addition to our normal contribution to OPEB for FY25 of \$250,000. In total, FY25 OPEB contributions will be \$744,622. We are very grateful for the support of the school committee, both town administrations, and the community for their support in helping ensure we fund our OPEB Liability.

Below is our reporting on the activity in our OPEB Trust Fund for the most recent completed fiscal year ending June 30, 2023.

<b>Other Post Employment Benefits Trust Fund - FY23 Summary</b>	
<b>As of June 30, 2023</b>	
Beginning Balance	\$ 100,058
FY23 District Contributions	\$ 2,150,000
FY23 District Withdrawals	\$ -
FY23 Profit/(Loss)	\$ 112,510
Net FY23 Activity	\$ 2,262,510
Ending Balance	<b>\$ 2,362,568</b>
Total OPEB Liability	\$ 41,380,386
Net OPEB Liability	\$ 39,017,818
Net Position as % of Total Liability	<b>5.71%</b>

## *Capital Stabilization Fund*

Our Capital Stabilization Fund was approved at the October 1, 2022 Special Town Meeting and FY24 represents the first year the District made contributions to the fund. Therefore, for this FY25 Annual Report, data is presented from July 1, 2023, through December 30, 2023. In the future, reporting will represent the most completed fiscal year.

The FY24 Budget contained funding of \$1,698,287 for the Capital Stabilization Fund. There were no withdrawals during the first half of the year and the District has realized \$27,993 in interest gains. This has led to a December 31, 2023, Capital Stabilization balance of \$1,726,280.

The District is thankful the community supported our request to have funds available for unforeseen or planned capital needs that may arise from operating our six buildings and the largest food service program in the two communities.

<b>Capital Stabilization Fund - FY24 Summary</b>	
<b>July 1, 2023 - December 31, 2023</b>	
Beginning Balance	\$ -
FY24 District Contributions	\$ 1,698,287
FY24 District Withdrawals	\$ -
FY24 Profit/(Loss)	<u>\$ 27,993</u>
Net FY24 Activity	\$ 1,726,280
Ending Balance	<span style="border: 1px solid black;">\$ 1,726,280</span>

## HWRSD Capital Improvement Project Summary

During FY24 the District has been working on the development of a new Capital Improve Project process. This new process was first rolled out to the Capital Planning/Finance Subcommittee on January 24, 2024, and then to the full School Committee on February 1, 2024. With this new process, the District will align our capital planning with our annual budget for inclusion each year, pending availability of funds. In addition, a new list of capital items/projects will be developed.

Below is a draft list of upcoming anticipated capital projects for the school district that were included in the new process. This list does not include the newly approved Athletic Complex Project or the Elementary School Project currently under development.

### **Capital Improvement Project Forecast (2024-2033 Draft)**

\*Estimates are based on “order of magnitude estimating.”

Location	Project	OOM Estimate
Buker	Site Repairs - Buker Storm Water Improvement	\$225,000.00
Buker	Fire Alarm System Replacement	\$529,628.00
Buker	Flooring Replacement/ACM Removal	\$300,000.00
Buker	Door Replacement	\$150,000.00
Buker	HVAC Controls Upgrade (DDC)	\$350,000.00
Buker	Ceiling Replacement/Painting	\$125,000.00
*Cutler	Fire Alarm System Replacement	\$420,500.00
*Cutler	Flooring Replacement/ACM Removal	\$250,000.00
*Cutler	1989 Wing Roof Replacement	\$500,000.00
HS	Flooring Replacement/ACM Removal	\$650,000.00
HS/MS	Boiler Plant Phased Replacement	\$600,000.00
HS/MS	Roof Replacement (Pending MSBA ARP)	\$5,500,000.00
HS/MS	Interior Painting	\$200,000.00
MS	Window Replacement	\$250,000.00
MS	HVAC Controls Upgrade (DDC)	\$400,000.00
*Winthrop	HVAC Full Replacement	\$4,855,400.00
*Winthrop	Electrical System Full Replacement	\$3,089,800.00
*Winthrop	Flooring Replacement/ACM Removal	\$250,000.00
	<i>*New school project will impact these items</i>	
		<b>\$18,645,328.00</b>

