

**TOWN WARRANT  
FOR THE ANNUAL TOWN MEETING  
FY' 2025  
THE COMMONWEALTH OF MASSACHUSETTS**

**FRANKLIN SS.**

To either of the Constables of the Town of Shelburne in the County of Franklin

**IN THE NAME OF THE COMMONWEALTH OF MASSACHUSETTS**, you are hereby directed to notify and warn the inhabitants of said Town, qualified to vote in elections and in Town affairs, to meet at the **Buckland Shelburne Elementary School, 75 Mechanic Street** in said Shelburne on **Tuesday, May 7, 2024, at 6:30 o'clock in the evening**, then and there to act on the following articles:

**ARTICLE 1.** To hear the annual reports of the officers of the Town and to act thereon.

**ARTICLE 2.** To see if the Town will vote to set the salaries of the Elected Officials within the Town in accordance with MGL. Chapter 41, Section 108 as follows, or take any other action relative thereto.

Moderator	\$ 202	Town Clerk	\$26,708
Chairman, Selectboard	\$3,515	Tree Warden	\$ 1,091
Selectboard Member	\$3,160	School Committee	\$ 443
Selectboard Member	\$3,160	School Committee	\$ 443
Chairman, Board of Assessors	\$1,789		
Assessor	\$1,512		
Assessor	\$1,512		

**ARTICLE 3.** To see if the Town will vote to authorize the Treasurer, with the approval of the Select board, to borrow money from time to time in anticipation of revenue of the financial year beginning July 1, 2024, in accordance with the provisions of Massachusetts General Laws Chapter 44, Section 4, and to issue a note or notes therefore, payable within one year, and to renew any note or notes as may be given for a period of less than one year, in accordance with General Laws Chapter 44, Section 17, or take any other action relative thereto.

**ARTICLE 4.** To see if the Town will vote to authorize the Town Treasurer, with the approval of the Selectboard, to enter into compensating balance agreements for Fiscal Year 2025, pursuant to M.G.L. c.44, section 53F, or take any other action relative thereto.

**ARTICLE 5.** To see if the Town will vote to authorize the Selectboard to apply for, execute contracts and expend Massachusetts Small Cities Program grants, MassWorks grant, or monies, or any Federal or State grants or monies, received as set forth in the appropriate application, or take any action relative thereto.

**ARTICLE 6.** To see if the Town will vote to accept and appropriate any and all funds provided to the Town by the State under Chapter 90 and such other funds as the Commonwealth of Massachusetts Department of Transportation may provide, and to authorize the Selectboard to enter into contracts with Commonwealth of Massachusetts Department of Transportation for Chapter 90 monies allocated to the Town by the State, or take any action relative thereto.

**ARTICLE 7.** To see if the Town will vote to appropriate sums of money for the following purposes and to raise the required amounts by taxation, or otherwise provide, or take any other action relative thereto.

Omnibus Article #7

4/22/2024	2024	2024	2024	2025	2025	Increase
	Request	Adjusted	Final	Request	Final	Decrease
<b>GENERAL GOVERNMENT</b>	<b>940,369</b>	<b>9,427</b>	<b>949,796</b>	<b>1,052,410</b>	<b>1,052,410</b>	<b>10.8%</b>
114 5100 Moderator's Salary	194		194	202	202	4.1%
122 5100 Selectboard Salaries	9,456		9,456	9,835	9,835	4.0%
122 5110 General Government Salaries	184,511		184,511	200,495	200,495	8.7%
840 919 4540 Other Post Employ Benefits Trust	15,000		15,000	15,000	15,000	0.0%
122 5400 Selectboard's Expense	1,930		1,930	1,950	1,950	1.0%
131 5400 Finance Committee Expense	140	2	142	145	145	2.1%
132 5400 Reserve Account	2,700		2,700	2,700	2,700	0.0%
135 5401 Accounting Services	29,452		29,452	42,710	42,710	45.0%
135 5402 Audit Town Records	21,000	4,500	25,500	25,500	25,500	0.0%
141 5110 Assessor's Salary	4,628		4,628	4,813	4,813	4.0%
141 5400 Assessor's Expense	8,485		8,485	9,020	9,020	6.3%
141 5403 Assessor's Contracted Services	6,000		6,000	16,599	16,599	176.7%
145 5400 Treasurer/Coll. Expense	11,167		11,167	13,082	13,082	17.1%
145 5405 Payroll Expense	4,000		4,000	4,175	4,175	4.4%
145 5404 Tax Title	5,000		5,000	5,000	5,000	0.0%
146 5111 Staff Certifications	1,000		1,000	1,000	1,000	0.0%
146 5406 Town Collection Software & Maint.	13,603		13,603	14,050	14,050	3.3%
151 5400 Legal Expense	9,500		9,500	9,500	9,500	0.0%
161 5100 Town Clerk's Salary	25,681		25,681	26,708	26,708	4.0%
161 5400 Town Clerk's Expense	1,200		1,200	1,500	1,500	25.0%
161 5407 Town Reports	1,100		1,100	1,200	1,200	9.1%
161 5408 Preservation of Town Records	6,000		6,000	0	0	-100.0%
162 5400 Election Expense	10,700		10,700	12,450	12,450	16.4%
162 5409 Registrars	1,591		1,591	2,150	2,150	35.1%
171 5400 Conservation Commission	3,020		3,020	3,078	3,078	1.9%
172 5429 APR Local Match	1,250		1,250	1,250	1,250	0.0%
172 5431 Land Preservation	1,250		1,250	1,250	1,250	0.0%
175 5400 Planning Board	6,724		6,724	6,906	6,906	2.7%
176 5400 Zoning Board Expense	2,730		2,730	2,829	2,829	3.6%
182 5442 S.F. Beautification Account	2,000		2,000	3,164	3,164	58.2%
182 5444 Bridge St. Pocket Park Lease	3,500		3,500	3,700	3,700	5.7%
192 5400 Town Office Expense	13,750		13,750	14,300	14,300	4.0%
192 5411 Computer Account	25,713		25,713	29,951	29,951	16.5%
192 5412 Town Web Site	1,200		1,200	1,350	1,350	12.5%
192 5430 Memorial Hall Expense	19,145		19,145	19,145	19,145	0.0%
192 5450 Memorial Hall Internet Access	3,200		3,200	3,200	3,200	0.0%
192 5460 Elevator Maintenance Account	10,500		10,500	10,500	10,500	0.0%
192 5470 Town-Wide Notification Sys.	2,615		2,615	2,660	2,660	1.7%
193 5400 Property & Liability Insurance	47,221	1,575	48,796	51,000	51,000	4.5%
193 5413 Officers Bonding	1,000		1,000	1,000	1,000	0.0%
199 5400 Longevity Pay	4,000		4,000	4,000	4,000	0.0%
752 5900 Interest Expense	8,600		8,600	8,600	8,600	0.0%
830 5310 FRCOG - Core	16,054		16,054	15,153	15,153	-5.6%
830 5340 FRCOG - Highway	2,850		2,850	2,850	2,850	0.0%
830 5350 FRCOG - Reg. Health Services	12,763		12,763	12,763	12,763	0.0%
911 5400 County Retirement	131,377		131,377	144,924	144,924	10.3%
912 5400 Worker's Compensation	34,162	3,350	37,512	39,304	39,304	4.8%
913 5400 Un-Employment Insurance	1,200		1,200	1,600	1,600	33.3%
914 5436 Health Insurance	195,137		195,137	228,403	228,403	17.0%
914 5437 Life Insurance	682		682	746	746	9.4%
916 5400 Medicare	14,688		14,688	19,000	19,000	29.4%

Omnibus Article #7

	2024	2024	2024	2025	2025	Increase
	Request	Adjusted	Final	Request	Final	Decrease
<b>PUBLIC SAFETY</b>	<b>617,987</b>	<b>0</b>	<b>626,487</b>	<b>631,715</b>	<b>631,715</b>	<b>0.8%</b>
210 5110 Police Department Salaries	487,032		487,032	497,593	497,593	2.2%
210 5400 Police Department Expense	89,420		94,420	88,620	88,620	-6.1%
210 5130 Constable	133		133	138	138	3.8%
220 5110 Fire Marshall	66		66	68	68	3.0%
220 5414 Forest Fires	50		50	50	50	0.0%
291 5100 Emergency Management Dir.	1,696		1,696	1,764	1,764	4.0%
291 5400 Emergency Mgmt Expense	2,775		2,775	2,925	2,925	5.4%
292 5100 Animal Control Officer	6,036		6,036	6,036	6,036	0.0%
292 5400 Animal Control Expense	800		800	800	800	0.0%
294 5110 Tree Warden	1,049		1,049	1,091	1,091	4.0%
294 5415 Shade Tree Maintenance	7,354		7,354	7,538	7,538	2.5%
294 5416 Shade Tree Replacement	656		656	672	672	2.4%
424 5400 Street Lights	20,920		24,420	24,420	24,420	0.0%
<b>EDUCATION</b>	<b>2,885,626</b>	<b>0</b>	<b>2,885,626</b>	<b>3,036,437</b>	<b>3,036,437</b>	<b>5.2%</b>
310 5100 School Committee Stipends	1,278		1,278	1,329	1,329	4.0%
310 5400 Mohawk Trail Reg. School	2,732,313		2,732,313	2,878,155	2,878,155	5.3%
320 5438 Vocation Tuition & Transport	0		0	0	0	0.0%
320 5417 Franklin County Tech School	152,035		152,035	156,953	156,953	3.2%
<b>HIGHWAYS</b>	<b>527,833</b>	<b>-</b>	<b>528,132</b>	<b>566,283</b>	<b>590,606</b>	<b>11.8%</b>
422 5120 Highway Salaries	274,644		274,644	285,605	309,928	12.8%
422 5360 Highway Grant Writing & Administration	12,000		12,000	13,200	13,200	10.0%
422 5400 Highway Maintenance	93,300		93,300	101,850	101,850	9.2%
423 5400 Snow & Ice Removal	114,000		114,000	129,000	129,000	13.2%
422 5418 Buildings & Grounds	27,509		27,509	30,248	30,248	10.0%
422 5420 EV Charging Stations	6,380		6,679	6,380	6,380	-4.5%
<b>HEALTH-SANITATION</b>	<b>129,004</b>	<b>0</b>	<b>129,004</b>	<b>127,373</b>	<b>127,373</b>	<b>-1.3%</b>
241 5400 Building Inspection Program	7,600		7,600	7,600	7,600	0.0%
293 5400 Animal Inspector	942		942	980	980	4.0%
439 5419 Solid Waste Management Dist.	8,642		8,642	9,086	9,086	5.1%
433 5400 Refuse Collection	94,814		94,814	92,571	92,571	-2.4%
439 5439 Hazardous Waste Day	2,474		2,474	2,500	2,500	1.1%
440 5100 Sewer Commissioner Salaries	1,026		1,026	1,067	1,067	4.0%
512 5100 Board of Health Salaries	1,506		1,506	1,566	1,566	4.0%
512 5400 Board of Health Expense	7,000		7,000	7,003	7,003	0.0%
512 5443 Mosquito Control District	5,000		5,000	5,000	5,000	0.0%
<b>RECREATION</b>	<b>22,555</b>	<b>12,000</b>	<b>34,555</b>	<b>39,499</b>	<b>39,499</b>	<b>14.3%</b>
630 5428 Recreation	2,055		2,055	2,137	2,137	4.0%
630 5427 Cowell Gym Maintenance	19,000	12,000	31,000	35,852	35,852	15.7%
692 5434 Bridge of Flowers	400		400	410	410	2.5%
692 5433 Military Band	1,100		1,100	1,100	1,100	0.0%
<b>HUMAN SERVICES</b>	<b>215,868</b>	<b>0</b>	<b>215,868</b>	<b>221,845</b>	<b>221,845</b>	<b>2.8%</b>
491 5400 Care of Hill Cemetery	10,450		10,450	11,700	11,700	12.0%
543 5422 Care of Veteran's Graves	845		845	845	845	0.0%
543 5400 Veteran's Benefits	15,000		15,000	15,000	15,000	0.0%
543 5423 Veteran's Center	5,203		5,203	5,682	5,682	9.2%
541 5400 Council on Aging	105,753		105,753	107,972	107,972	2.1%
610 5424 Shelburne Free Public Library	38,151		38,151	39,296	39,296	3.0%
610 5425 Arms Library	39,616		39,616	40,500	40,500	2.2%
692 5432 Memorial Day	850		850	850	850	0.0%

Omnibus Article #7

<b>BUDGET SUMMARY TOTALS</b>	<b>5,339,242</b>	<b>21,427</b>	<b>5,369,468</b>	<b>5,675,562</b>	<b>5,699,885</b>	<b>6.2%</b>
<b>General Government</b>	<b>940,369</b>	<b>9,427</b>	<b>949,796</b>	<b>1,052,410</b>	<b>1,052,410</b>	<b>10.8%</b>
<b>Public Safety</b>	<b>617,987</b>	<b>0</b>	<b>626,487</b>	<b>631,715</b>	<b>631,715</b>	<b>0.8%</b>
<b>Education</b>	<b>2,885,626</b>	<b>0</b>	<b>2,885,626</b>	<b>3,036,437</b>	<b>3,036,437</b>	<b>5.2%</b>
<b>Highways</b>	<b>527,833</b>	<b>0</b>	<b>528,132</b>	<b>566,283</b>	<b>590,606</b>	<b>11.8%</b>
<b>Health &amp; Sanitation</b>	<b>129,004</b>	<b>0</b>	<b>129,004</b>	<b>127,373</b>	<b>127,373</b>	<b>-1.3%</b>
<b>Recreation</b>	<b>22,555</b>	<b>12,000</b>	<b>34,555</b>	<b>39,499</b>	<b>39,499</b>	<b>14.3%</b>
<b>Human Services</b>	<b>215,868</b>	<b>0</b>	<b>215,868</b>	<b>221,845</b>	<b>221,845</b>	<b>2.8%</b>

**ARTICLE 8.** To see if the Town will vote to appropriate the sum of \$56,784 to be used to fund the Mohawk Trail Regional School District capital budget for fiscal year 2025; to meet this obligation transfer \$500 from the Quintus Allen Trust Fund and raise and appropriate the balance of \$56,284(*debt exclusion applies*) or take any other action relative thereto.

**ARTICLE 9.** To see if the Town will vote to transfer the sum of \$35 from the Ozro Miller Trust Fund Account, said sum to be placed in the Memorial Day Expense Account # 001-692-5432, or take any other action relative thereto.

**ARTICLE 10.** To see if the Town will vote to transfer the sum of \$1,433 from the Cowell Gym User Fee Account #245-630-5400; said sum to be added to the Recreation Account #001-630-5428 and shall be used to supplement the Cowell Gym Director’s Salary, or take any other action relative thereto.

**ARTICLE 11.** To see if the Town will vote to approve the following Revolving Fund Accounts in accordance with the Town of Shelburne Town By-laws Section 8 entitled: Departmental Revolving Funds or take any other action relative thereto.

Police Department	\$6,000	Recreation Committee	\$3,000
Town Clerk	\$2,500	Open Space Committee	\$2,000
Board of Health	\$2,000	Agricultural Commission	\$4,000
Zoning Board	\$1,000	Conservation Commission	\$1,000

**ARTICLE 12.** To see if the Town will vote to transfer the sum of \$211,623 from the Stabilization Account #830-919-5400 to fund the following capital expenditures, or take any other action relative thereto.

- **Franklin County Technical School Capital Budget** **\$ 6,656.00**  
*Fourth Year Payment on Capital Improvement Projects*
- **Roof Replacement/Repair Stabilization Account #831-919-4540** **\$ 5,000.00**  
*For future repair of replacement of town-owned roofs*
- **Municipal Vehicle Stabilization Account #832-919-4540** **\$35,000.00**  
*For replacement of town-owned vehicles.*
- **Highway Equipment Stabilization Account #833-919-4540** **\$35,000.00**  
*For purchase of Highway Equipment in subsequent years.*
- **Police Station/Municipal Building** **\$42,088.00**  
*Payment 6 of 10 for purchase of building.*
- **2018 Western Star Highway Department Truck** **\$30,600.00**  
*Borrowed \$120,000 – Payment 4 of 4*
- **Highway Dump Truck with Plow & Sander** **\$57,279.00**  
*Payment 2 of 4*

**ARTICLE #13** To see if the Town will vote to re-adopt and accept the provisions of Section 20 of Chapter 32B of the *Massachusetts General Laws*, as amended by Section 15 of Chapter 218 of the Acts of 2016, establishing an Other Post-Employment Benefits Liability Trust Fund; to authorize the Selectboard and Treasurer to execute a declaration of trust creating an expendable trust for the purpose of holding monies appropriated to such fund; to designate the Treasurer as the trustee of such trust; to authorize the transfer of any and all monies currently held for the purpose of paying retiree health and life benefits to such trust; and to authorize the trustee to invest and reinvest the monies in such fund accordance with the Prudent Investor Rule established under Chapter 203C of the *Massachusetts General Laws*. (*Previously voted May 5, 2015*)

**ARTICLE 14.** To see if the Town will vote to transfer \$27,000 from the Stabilization Account #830-919-5400 for the purchase and installation of a new server at Town Hall, or take any other action relative thereto.

**ARTICLE 15.** To see if the Town will vote to transfer \$5,000 from the Stabilization Account #830-919-5400 for the purchase of a new copier at Town Hall, or take any other action relative thereto. *(Present copier is ten years old and costs to maintain are high).*

**ARTICLE 16.** To see if the Town will vote to transfer \$55,000 from the Housing Trust Fund Account # 248-691-5400 to pay for half of a new elevator lift at the Arms Library, or take any other action relative thereto.

**ARTICLE 17.** To see if the Town will vote to transfer \$55,000 from the Housing Trust Fund Account # 248-691-5400 said sum to be used for a variety of improvement projects/deferred maintenance at the Cowell Gymnasium (repair of bleachers, basement windows, repairs to TAB room, etc.), or take any other action relative thereto.

**ARTICLE 18.** To see if the Town will vote to appropriate or reserve from the Community Preservation Fund annual revenues in the amounts recommended by the Community Preservation Committee for committee administrative expenses, community preservation projects and other expenses in fiscal year 2025, with each item to be considered a separate appropriation, or take any other action relative thereto.

**Appropriations:**

From FY 2025 estimated revenues for Committee Administrative Expenses	\$ 7,200
---	----------

**Reserves:**

From FY 2025 estimated revenues for Historic Resources Reserve	\$ 14,400
From FY 2025 estimated revenues for Community Housing Reserve	\$ 14,400
From FY 2025 estimated revenues for Open Space Reserve	\$ 14,400
From FY 2025 estimated revenues for FY25 Budgeted Reserve	\$ 93,600

**ARTICLE 19.** To see if the Town will vote to transfer \$10,000 from the Stabilization Account #830-919-5400 for the completion of a Wage and Classification Study for the Police Department, or take any other action relative thereto.

**ARTICLE 20.** - LED Streetlights Conversion/Ownership: To see if the Town will vote to transfer \$75,000 from the Stabilization Account #830-919-5400, said funds to be used to engage the services of a streetlight consulting firm; to acquire, install and perform maintenance of LED Streetlights; and to take any other action related thereto.

*Explanation: The Town seeks to purchase approximately 100 Eversource-owned streetlights currently situated within the Town, and to contract with a streetlight consulting company to oversee all aspects of conversion of the said streetlight units to LED. Emphasis will be on implementing a cost-effective product that will be environmentally friendly and minimize any adverse impact of LED conversion on public safety and health. This project is estimated to reduce 27,473 kWh in electrical usage annually for the Town's streetlights. This equates to estimated annual savings of*

*\$10,100 in electricity and maintenance/rental costs. Additionally, it is expected that the conversion will decrease greenhouse gas emissions by about 19.2 tons per year. The Town also expects to pursue grant funding (Green Communities) to potentially offset up- to \$30,000 of this project, which would allow those funds to be returned to the Town.*

**ARTICLE 21** To see if the Town will vote to transfer \$428,114 in Free Cash to the Unrestricted Stabilization Account # 830-919-5400, or take any other action relative thereto.

**ARTICLE 22.** To see if the Town will vote to raise, appropriate, or otherwise provide, the sum of \$195,412, said sum is the Town of Shelburne’s share of the cost of Operation & Maintenance of the Shelburne Falls Wastewater Treatment Facility which, will be raised by anticipated revenue from Shelburne User Assessments, or take any other action relative thereto.

**ARTICLE 23.** To see if the Town will vote to raise, appropriate, or otherwise provide the sum of \$25,000, said sum is the Town of Shelburne’s share of Operation & Maintenance of the Shelburne Pumping Station which, will be raised by anticipated revenue from Shelburne User Assessments, or take any other action relative thereto.

**ARTICLE 24.** To see if the Town will vote to transfer the sum of \$10,400 from the Sewer Enterprise Account #610-001-3550; said sum to pay the Town’s share of the Ground Mounted Solar Array at the Waste Water Treatment Facility, or take any other action relative thereto.

**ARTICLE 25.** To see if the Town will vote to revise the Shelburne Town By-laws by rescinding Section 7 of Article 2 which reads: The Town Collector shall retain all fees received from Municipal Lien Certificates in accordance with Chapter 60, Section 23 of the General Laws of the Commonwealth of Massachusetts and replace with:

Town Employees, Appointed, and Elected officials are prohibited from collecting any fees and/or fines associated with their job function. All fees collected by the Town of Shelburne shall be retained by the Town, or take any other action relative thereto.

**ARTICLE 26.** To see if the Town will vote to add the following sub-section to SECTION 6.0 – SPECIAL PERMITS AND FINDINGS of the Shelburne Zoning Bylaws, or take any other action relative thereto.

6.8 Zoning Board of Appeals: Except as otherwise specified in any Town Bylaw, the Zoning Board of Appeals shall serve as the Special Permit Granting Authority (“SPGA”) for the Town.

.....  
**ARTICLE 27.** To see if the Town will vote to Delete the following Definition and Use from the Shelburne Zoning Bylaws, or take any other action relative thereto.

**SECTION 2.0 – DEFINITIONS**

~~Municipal or Non-Profit Trail: any trail, walkway or pathway open to the general public and intended for non-motorized, except mobility assisting devices used by handicapped persons, recreational use. Such trails shall have barriers at the start and finish, and shall be designed to avoid private lands and return users to public ways. The Trail shall have appropriate signage indicating the beginning and ending of the Trail and directing users away from private lands near the Trail.~~

**4.3 TABLE OF USE REGULATIONS:**

Agricultural*** & Recreational Uses	RA	VR	VC	C	I
Municipal or Non-Profit Trail	SP	SP	SP	SP	SP

.....

**ARTICLE 28.** To see if the Town will vote to amend the MOHAWK TRAIL REGIONAL SCHOOL DISTRICT – REGIONAL DISTRICT AGREEMENT by striking the following language contained in **Section IV Apportionment of Expenses among Member Towns, Subsections (A) through (J)**:

**(A) Classification of Costs**

For the purpose of apportioning assessments levied by the District upon the member towns, costs shall be divided into two categories: capital costs and operating costs.

**(B) Capital Costs**

Capital costs shall include all expenses in the nature of capital outlay such as the cost of acquiring land, the cost of constructing, reconstructing and adding to buildings, and the cost of remodeling or making extraordinary repairs to a school building or buildings, including without limitations the cost of the original equipment and furnishings for such buildings or additions, plans, architects' and consultants' fees, grading and other costs incidental to placing school buildings and additions and related premises in operating condition. Capital costs shall also include payments of principal and interest on bonds, notes or other obligations issued by the District to finance capital costs. Instructional capital expenditures which qualify under net school spending are not included under capital costs, and instead are included as an operating cost.

**(C) Operating Costs**

Operating costs shall include all costs not included in capital costs as defined in subsection IV(B) but including interest on temporary notes issued by the District in anticipation of revenue.

**(D) Responsibility for Capital and Operating Costs**

(1) Grades 7-12

Operating and capital costs, as defined above, associated with grades seven to twelve (7-12) inclusive of the District school or schools shall be deemed District costs and the member towns shall be assessed their respective net shares thereof in accordance with the provisions of this Agreement.

(2) Grades pre-K-6

(a) Costs associated with the operation of grades pre-Kindergarten to six, inclusive, of the District schools shall be deemed operating costs of the District and the member towns shall be assessed their respective net shares thereof in accordance with the provisions of this Agreement.

(b) All capital costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District schools shall be deemed capital costs of the District and the member towns shall be assessed their respective net shares thereof in accordance with the provisions of section IV(E) of this Agreement.

(c) If any member town or towns should construct an elementary school, the respective member town or towns will assume responsibility for all capital costs.

**(E) Apportionment of Capital Costs Grades pre-K-6**

(1) Ashfield, Plainfield

Capital costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving pupils from the Towns of Ashfield and Plainfield shall be apportioned to the Towns of Ashfield and Plainfield as follows:

To Ashfield: A portion of the whole expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: By (1), computing the ratio which the population of the Town of Ashfield bears to the total of the population of the Towns of Ashfield and Plainfield, and by (2), computing the ratio which the sum of the enrollments of pupils at said school(s), resident in the Town of Ashfield, as determined by the census of pupils at said school(s) each October 1 for the five most recent years, bears to the sum of the enrollment of

pupils at the Ashfield Plainfield district school(s), resident in the Towns of Ashfield and Plainfield, as determined by the census of pupils at said school(s) each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016); and by summing both ratios ((1) + (2)), and dividing such sum by two.

To Plainfield: A portion of the whole expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: By (1), computing the ratio which the population of the Town of Plainfield bears to the total of the population of the Towns of Ashfield and Plainfield, and by (2), computing the ratio which the sum of the enrollments of pupils at the Ashfield Plainfield district school(s), resident in the Town of Plainfield, as determined by the census of pupils at said school(s) each October 1 for the five most recent years, bears to the sum of enrollment of pupils at the Ashfield and Plainfield district school(s), resident in the Towns of Ashfield and Plainfield, as determined by the census of pupils at said school(s) each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016); and by summing both ratios ((1)+(2)), and dividing such sum by two.

(2) Buckland, Shelburne

Capital costs incurred by the committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving the pupils from the Towns of Buckland and Shelburne shall be apportioned to the Towns of Buckland and Shelburne as follows:

To Buckland: A portion of the total of all principal and interest on bonds, notes or other obligations as issued by the Committee consistent with the above, expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: By (1), computing ratio which the sum of the enrollments of pupils at the Buckland Shelburne Elementary School, resident in the Town of Buckland, as determined by the census of pupils at said district school each October 1 for the five most recent years, bears to the sum of enrollments of pupils at the said district school, resident in the Towns of Buckland and Shelburne, as determined by the census of pupils each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016); and by (2) expressing such ratio as a percentage.

To Shelburne: A portion of the total of all principal and interest on bonds, notes or other obligations as issued by the Committee consistent with the above, expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: By (1), computing the ratio which the sum of the enrollments of pupils at the Buckland Shelburne Elementary School, resident in the Town of Shelburne, as determined by the census of pupils at said district school each October 1 for the five most recent years, bears to the sum of enrollments of pupils at said district school, resident in the Towns of Buckland and Shelburne, as determined by the census of pupils each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016); and by (2) expressing such ratio as a percentage.

(3) Colrain, Heath

Effective commencing with Fiscal Year 2023, new capital costs incurred by the committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving the pupils from the Towns of Colrain and Heath shall be apportioned to the Towns of Colrain and Heath as follows:

To Colrain: A portion of the total of all principal and interest on bonds, notes or other obligations as issued by the Committee consistent with the above, expressed as a percentage of the total to the nearest one-hundredth of one percent calculated as follows: By (1), computing

the ratio which the sum of the enrollments of pupils at the Colrain Center School, resident in the Town of Colrain as determined by the census of pupils at said district school each October 1 for the five most recent years, bears to the sum of enrollments of pupils at said district school, resident in the Towns of Heath and Colrain, as determined by the census of pupils each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation); and by (2) expressing such ratio as a percentage. Until five years of data becomes available, the most recent years of data shall be used to determine said ratio.

To Heath: A portion of the total of all principal and interest on bonds, notes or other obligations as issued by the Committee on or after July 1, 2022 consistent with the above, expressed as a percentage of the total to the nearest one-hundredth of one percent calculated as follows: By (1), computing the ratio which the sum of the enrollments of pupils at the Colrain Center School, resident in the Town of Heath as determined by the census of pupils at said district school each October 1 for the five most recent years, bears to the sum of enrollments of pupils at said district school, resident in the Towns of Heath and Colrain, as determined by the census of pupils each October 1 for the five most recent years (note: pre-K enrollment will be included in the calculation); (2) expressing such ratio as a percentage. Until five years of data becomes available, the most recent years of data shall be used to determine said ratio.

- (4) The Heath Elementary School Building was returned to the Town of Heath on July 1, 2017, and the Lease between the parties terminated as of said date. In exchange for termination of the lease, the District paid to the Town of Heath a total sum of \$240,000.00. Any outstanding debt payments associated with the Heath Elementary School shall remain the responsibility of the Town of Heath, and the Town of Heath shall continue to be assessed for said debt in accordance with the terms of this Agreement.
- (5) Capital costs representing payments of principal and interest on bonds, notes or other obligations as issued by the Committee to finance expenses in the nature of capital outlay for the purpose of construction at the site of, or reconstruction to, the Colrain Central School or upon any premises as may be leased to the Mohawk Trail Regional School District by the Town of Colrain, shall be borne by the Towns of Colrain and Heath, as provided in Section E. (3), above.
- (6) Nothing in this section shall be construed to prevent the member towns from amending this Agreement and modifying and/or altering the above designated schedules of apportionment of capital costs in the event subsequent school construction or reconstruction results in a change of grade level or town assignments to the District schools.

**(F) Apportionment of Capital Costs Grades 7-12**

Capital costs represented by debt service shall be apportioned as a capital cost of the year in which the debt service falls due.

Capital costs incurred July 1, 1993 and thereafter shall be apportioned to the member towns annually for the ensuing fiscal year as follow:

- (1) Each member town's share of capital costs associated with the District High School for each capital project shall be apportioned to the member towns on the basis of their respective pupil enrollments at said school. Each member town's share shall be determined by computing the ratio which that town's average pupil enrollment at said school on October 1 of each of the five years next preceding the first year for which the apportionment is determined bears to the total average pupil enrollment from all member towns at said school for the same five year period. In the event that enrollment at the District High School has not been accomplished by October 1, capital costs shall be determined on the basis of enrollment in grades seven through twelve of pupils residing in each member town and receiving education at such town's expense on October 1 of that year.

- (2) Each member town's percentage share to the nearest one tenth of one percent will remain in effect for the term of the debt for each capital project.

**(G) Apportionment of Operating Costs**

Operating costs for the first fiscal year next following the effective date of Chapter 371 of the Acts of 1993 (See attachment) and for every fiscal year thereafter shall be apportioned to the member towns on the basis of their respective pupil enrollments in the regional District schools. Each member town's share for each fiscal year shall be determined by computing the ratio which that town's average pupil enrollment in the District schools on October 1 of each of the five years next preceding the year for which the apportionment is to be determined bears to the total average pupil enrollment from all member towns in the regional District schools for the same five year period (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016), as more fully set forth in Subsection IV(H) below. In the event that enrollment in the regional District schools has not been accomplished by October 1 of any year, operating costs shall be apportioned on the basis of enrollment in grades pre-kindergarten through twelve of pupils residing in each member town and receiving education at such town's expense on October 1 of that year.

**(H) The apportionment of operating costs shall be determined in accordance with the following procedure:**

First: The Committee shall determine the proportion of the annual budget representing costs associated with the provisions of services to grades seven through twelve and the proportion representing costs associated with all other services including services to grades pre-kindergarten through six.

Second: The Committee shall determine the average enrollment share of each member town in grades seven through twelve, inclusive. For this purpose, average enrollment share shall equal, for each member town, its five-year average proportionate share of total student enrollment in the district schools for grades seven through twelve, as of October 1 in each of the five years immediately preceding the year for which such allocation is to be made.

Third: The Committee shall apportion costs of grades seven through twelve, inclusive, to the Towns of Hawley and Charlemont in direct proportion to each town's five-year average share of student enrollment in grades seven through twelve, inclusive.

Fourth: The total budget, less the shares allocated to the Towns of Hawley and Charlemont, shall be apportioned among the District's six remaining member towns on the basis of each member town's five-year average student enrollment share. For purposes of this calculation, average enrollment share, for each of the pre-K-12 Member Towns shall be based on its five year average proportionate share of total student enrollment in the district schools (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016).

**(I) Times of Payment of Apportioned Costs**

Each member town shall pay to the District in each fiscal year its proportionate share, certified as provided in subsection VI(B), of the capital and operating costs. Except as otherwise provided in subsection VI(A), the annual share of each member town shall be paid in such amounts and at such times that at least the following percentages of such annual share shall be paid on or before the dates indicated, respectively:

August 1	16.25%
October 1	36.25%
December 1	50.00%

February 1	67.50%
April 1	87.50%
May 1	100.00%

**(J) Special Funds**

The District School Committee shall not interfere with a town's or Local Education Council's use of trust funds or other special funds, including separate town meeting articles, intended for the enhancement of the educational opportunities for that town's pupils at the pre-K-6 grades only. The operations budget shall not be reduced by the receipt of such funds.

\*\*\*\*\*

**and replacing said language of Section IV with the following Subsections (A) through (I), as re-lettered so as to combine existing Subsections (G) and (H) and re-letter the following sections as (H) and (I):**

**(A) Classification of Costs**

For the purpose of apportioning assessments to the member towns, costs shall be divided into two categories: capital costs and operating costs.

**(B) Capital Costs**

Capital Costs to be assessed to towns (hereafter "Capital Costs") shall include all expenses in the nature of capital outlay such as the cost of:

- (1) acquiring land, constructing, reconstructing and adding to or remodeling buildings, including without limitations the cost of the original equipment and furnishings for such buildings or additions, plans, architects' and consultants' fees, grading and other costs incidental to placing school buildings and additions and related premises in operating condition;
- (2) remodeling, or making extraordinary repairs to, an existing school building or buildings;
- (3) purchasing buses and/or other necessary vehicles for District school use.

Capital Costs shall also include payments of principal and interest on bonds, notes or other obligations issued by the District to finance Capital Costs. Capital Costs represented by debt service shall be apportioned as a Capital Cost of the year in which the debt service falls due. Each member town's percentage share of debt service, calculated to the nearest one hundredth of one percent at the time such debt is issued, will remain in effect for the term of the debt for each capital project.

Capital expenditures which qualify under net school spending are not included under Capital Costs, and instead are included as an operating cost.

**(C) Operating Costs**

Operating costs shall include all costs not included in Capital Costs as defined in Section IV(B), above, but including transportation costs (as per Section VIII of this Agreement) and interest on temporary notes issued by the District in anticipation of revenue.

**(D) Responsibility for Capital and Operating Costs**

**(1) Grades 7-12**

Operating costs and Capital Costs, as defined above, associated with grades seven to twelve (7-12), inclusive, of the District school or schools shall be deemed District costs and the member towns shall be assessed their respective shares thereof in accordance with the provisions of Sections IV (F) and (G) of this Agreement.

**(2) Grades pre-K-6**

(a) Costs associated with the operation of grades pre-Kindergarten to six, inclusive, of the District schools shall be deemed operating costs of the District and the member towns shall

be assessed their respective shares thereof in accordance with the provisions of Section IV (G) of this Agreement.

- (b) Capital Costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District schools shall be deemed Capital Costs of the District and shall be assessed to member towns based on their respective shares thereof in accordance with the provisions of Section IV (E) of this Agreement.

**(E) Apportionment of Capital Costs Grades pre-K-6**

- (1) Capital Costs assessed to member towns prior to July 1, 2025 shall be assessed under Section IV (E) of the Mohawk Trail Regional School District Regional Agreement adopted by member Towns May-June 2018 and approved by the Commissioner of Elementary and Secondary Education on August 1, 2018, with amendments approved by the Commissioner of Elementary and Secondary Education, October 25, 2022 (referred to hereafter as the “Prior Capital Assessment Grades pre-K to 6”). Capital Costs assessed to towns after July 1, 2025, shall be assessed to the member towns as described below in paragraphs (a) through (c) of this Section (E) (1), (referred to hereafter as “the New Capital Assessment Calculation – pre-K to 6”), subject to the Transition Period as provided in Paragraph (3) of this Section (E), below. Such assessments shall be made on the basis of each town’s proportionate share of District foundation enrollment for Grades pre-K to 6. District foundation enrollment, as defined in M.G.L. c. 70, Section 2, is determined by the Massachusetts Department of Elementary and Secondary Education (DESE) as of October 1 of each year.

- (a) Ashfield, Plainfield

Capital Costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving pupils from the Towns of Ashfield and Plainfield shall be apportioned to the Towns of Ashfield and Plainfield as follows:

To Ashfield: A portion of the all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one percent calculated as follows: by (1) computing the ratio which the population of the Town of Ashfield bears to the total of the population of the Towns of Ashfield and Plainfield, and by (2) computing the ratio which the sum of the District’s pre-K-6 foundation enrollment of pupils resident in the Town of Ashfield for the five most recent years bears to the sum of the District’s pre-K-6 foundation enrollment of pupils resident in the Towns of Ashfield and Plainfield for the five most recent years; and (3) by summing both ratios ((1) + (2)) and dividing such sum by two.

To Plainfield: A portion of the all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one percent calculated as follows: by (1) computing the ratio which the population of the Town of Plainfield bears to the total of the population of the Towns of Ashfield and Plainfield, and by (2) computing the ratio which the sum of the District’s pre-K-6 foundation enrollment of pupils resident in the Town of Plainfield for the five most recent years, bears to the sum of the District’s pre-K-6 foundation enrollments of pupils resident in the Towns of Ashfield and Plainfield for the five most recent years; and (3) by summing both ratios ((1) + (2)) and dividing such sum by two.

- (b) Buckland, Shelburne

Capital Costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving the pupils from the Towns of Buckland and Shelburne shall be apportioned to the Towns of Buckland and Shelburne as follows:

To Buckland: A portion of the total of all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: by (1) computing the ratio which the sum of the District’s pre-K-6 foundation enrollment of pupils resident in the

Town of Buckland for the five most recent years bears to the sum of the District's pre-K-6 foundation enrollments of pupils resident in the Towns of Buckland and Shelburne for the five most recent years, and by (2) expressing such ratio as a percentage.

To Shelburne: A portion of the total of all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: by (1) computing the ratio which the sum of the District's pre-K-6 foundation enrollment of pupils resident in the Town of Shelburne for the five most recent years bears to the sum of the District's pre-K-6 foundation enrollments of pupils resident in the Towns of Buckland and Shelburne for the five most recent years, and by (2) expressing such ratio as a percentage.

(c) Colrain, Heath

Capital Costs incurred by the Committee and associated with grades pre-Kindergarten to six, inclusive, of the District school or schools serving the pupils from the Towns of Colrain and Heath shall be apportioned to the Towns of Colrain and Heath as follows:

To Colrain: A portion of the total of all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: by (1) computing the ratio which the sum of District's pre-K-6 foundation enrollment of pupils resident in the Town of Colrain for the five most recent years bears to the sum of the District's pre-K-6 foundation enrollments of pupils resident in the Towns of Colrain and Heath for the five most recent years, and by (2) expressing such ratio as a percentage. Until five years of data for both towns becomes available, the most recent years of data shall be used to determine said ratio.

To Heath: A portion of the total of all such Capital Costs expressed as a percentage of the total to the nearest one-hundredth of one per-cent calculated as follows: by (1) computing the ratio which the sum of District's pre-K-6 foundation enrollment of pupils resident in the Town of Heath for the five most recent years bears to the sum of the District's pre-K-6 foundation enrollments of pupils resident in the Towns of Colrain and Heath for the five most recent years, and by (2) expressing such ratio as a percentage. Until five years of data for both towns becomes available, the most recent years of data shall be used to determine said ratio.

The Town of Colrain shall retain sole responsibility for all Capital Costs for which bonds were issued prior to November 2022.

- (2) Nothing in this Paragraph (E) shall be construed to prevent the member towns from amending this Agreement in accordance with Section XI in order to modify and/or alter the above designated schedules of apportionment of Capital Costs in the event subsequent school construction or reconstruction results in a change of grade level or town assignments to the District schools.

(3) Transition Period

The transition to the New Capital Assessment Calculation – Grades pre-K to 6 shall take place over a period of five (5) years, beginning July 1, 2025 (for Fiscal Year 2026) and ending on June 30, 2030.

- (a) For Fiscal Year 2026 (commencing July 1, 2025 and ending on June 30, 2026), determination of the most recent year's enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades pre-K to 6 as described in this Section IV (E), and the four years prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades pre-K to 6.

- (b) For Fiscal Year 2027 (commencing July 1, 2026 and ending on June 30, 2027), determination of the most recent two years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades pre-K to 6 as described in this Section IV (E), and the three years prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades pre-K to 6.
- (c) For Fiscal Year 2028 (commencing July 1, 2027 and ending June 30, 2028), determination of the most recent three years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades pre-K to 6 as described in this Section IV (E), and the two years prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades pre-K to 6.
- (d) For Fiscal Year 2029 (commencing July 1, 2028 and ending June 30, 2029), determination of the most recent four years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades pre-K to 6 as described in this Section IV (E), and the one year prior enrollment shall be calculated using the Prior Capital Assessment Calculation – Grades pre-K to 6.
- (e) For Fiscal Year 2030 (commencing July 1, 2029) and all subsequent years, determination of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades pre-K to 6 as described in this Section IV (E).

**(F) Apportionment of Capital Costs Grades 7-12**

- (1) Capital Costs assessed to member towns prior to July 1, 2025 shall be assessed under Section IV (F) of the Mohawk Trail Regional School District Regional Agreement adopted by member Towns May-June 2018 and approved by the Commissioner of Elementary and Secondary Education on August 1, 2018, with amendments approved by the Commissioner of Elementary and Secondary Education, October 25, 2022 (referred to hereafter as “the Prior Capital Assessment Calculation – Grades 7-12”). Capital Costs assessed to towns after July 1, 2025, shall be assessed to the member towns as described below in paragraph (2) of this Section (F) (referred to hereafter as “the New Capital Assessment Calculation – Grades 7-12”), subject to the Transition Period as provided in Paragraph (3) of this Section (F), below. Such assessments shall be made on the basis of each town’s proportionate share of District foundation enrollment for Grades 7-12. District foundation enrollment, as defined in M.G.L. c. 70, Section 2, is determined by the Massachusetts Department of Elementary and Secondary Education (DESE) as of October 1 of each year.
- (2) Each member town’s share of Capital Costs associated with the District Middle School/High School as well as District-Wide Capital Costs shall be apportioned to the member towns on the basis of said town’s share of the District’s foundation enrollment for Grades 7-12. Each member town’s share shall be determined by computing the ratio which Grade 7-12 students who reside in each town and are included in the District’s foundation enrollment for each of the most recent five years bears to the District’s total foundation enrollment for Grades 7-12 for the same five-year period, expressed as a percentage of the total to the nearest one-hundredth of one percent.
- (3) Transition Period  
The transition to the New Capital Assessment Calculation – Grades 7-12 shall take place over a period of five (5) years, beginning July 1, 2025 (for Fiscal Year 2026) and ending on June 30, 2030.
  - (a) For Fiscal Year 2026 (commencing July 1, 2025 and ending on June 30, 2026), determination of the most recent year’s enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades 7-12 as described in this Section IV (F), and the four years

prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades 7-12).

- (b) For Fiscal Year 2027 (commencing July 1, 2026 and ending on June 30, 2027), determination of the most recent two years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades 7-12 as described in this Section IV (F), and the three years prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades 7-12).
- (c) For Fiscal Year 2028 (commencing July 1, 2027 and ending June 30, 2028), determination of the most recent three years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades 7-12 as described in this Section IV (F), and the two years prior enrollments shall be calculated using the Prior Capital Assessment Calculation – Grades 7-12).
- (d) For Fiscal Year 2029 (commencing July 1, 2028 and ending June 30, 2029), determination of the most recent four years of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades 7-12 as described in this Section IV (F), and the one year prior enrollment shall be calculated using the Prior Capital Assessment Calculation – Grades 7-12).
- (e) For Fiscal Year 2030 (commencing July 1, 2029) and all subsequent years, determination of enrollment shall be calculated on the basis the New Capital Assessment Calculation – Grades 7-12 as described in this Section IV (F).

**(G) Apportionment of Operating Costs**

Each member town will contribute to the District no less than its minimum required local contribution as determined by the Commissioner pursuant to M.G.L. c. 70, Section 6. Any amounts in excess of the minimum required local contribution needed to support the District's budget will be assessed to the member towns in accordance with this Section IV (G.)

- (1) Operating Costs assessed to member towns prior to July 1, 2025 will be assessed under Sections IV (G) and IV (H) of the Mohawk Trail Regional School District Regional Agreement adopted by MTRSD Towns May-June 2018 and approved by the Commissioner of Elementary and Secondary Education on August 1, 2018, with amendments approved by the Commissioner of Elementary and Secondary Education, October 25, 2022 (referred to hereafter as “the Prior Operating Assessment Calculation”).
- (2) Operating Costs assessed to member towns after July 1, 2025, shall be assessed as described in paragraphs (a) through (d), below, (referred to hereafter as “the New Operating Assessment Calculation”), subject to the Transition Period as provided in Paragraph (3) of this Section IV (G). Such assessments shall be made on the basis of each town’s proportionate share of District foundation enrollment. District foundation enrollment, as defined in M.G.L. c. 70, Section 2, is determined by the Massachusetts Department of Elementary and Secondary Education (DESE) as of October 1 of each year.
  - (a) First, the Committee shall determine the proportion of the annual budget representing costs associated with the provision of services to grades seven through twelve and the proportion representing costs associated with all Central Office and District-Wide services, including such services to grades pre-kindergarten through six.
  - (b) Second, the Committee shall determine the average District foundation enrollment share of each member town in grades seven through twelve, inclusive. For this purpose, each member town’s share shall be determined by computing the ratio which Grade 7-12 students who

reside in each town and are included in the District's foundation enrollment for each of the most recent five years bears to the District's total foundation enrollment for Grades 7-12 for the same five-year period, expressed as a percentage of the total to the nearest one-hundredth of one percent.

- (c) Third, the Committee shall apportion the costs of grades seven through twelve, inclusive, to the Towns of Hawley and Charlemont in direct proportion to each town's five-year average share of District foundation enrollment in grades seven through twelve, inclusive.
- (d) Fourth, the total amount in excess of the aggregate minimum required local contributions, less the shares allocated to the Towns of Hawley and Charlemont, shall be apportioned among the District's six remaining member towns on the basis of each member town's five-year average District foundation enrollment share. For purposes of this calculation, average District foundation enrollment share for each of the pre-K-12 Member Towns shall be based on its five-year average proportionate share of total District foundation enrollment.

**(3) Transition Period**

The transition to the New Operating Assessment Calculation shall take place over a period of five (5) years, beginning July 1, 2025 (for Fiscal Year 2026) and ending on June 30, 2030.

- (a) For Fiscal Year 2026 (commencing July 1, 2025 and ending on June 30, 2026), determination of the most recent year's enrollment shall be calculated on the basis of the New Operating Assessment Calculation as described in this Section IV (G), and the four years prior enrollments shall be calculated using the "Prior Operating Assessment Calculation".
- (b) For Fiscal Year 2027 (commencing July 1, 2026 and ending on June 30, 2027), determination of the most recent two years of enrollment shall be calculated on the basis of the New Operating Assessment Calculation as described in this Section IV (G), and the three years prior enrollments shall be calculated using the Prior Operating Assessment Calculation.
- (c) For Fiscal Year 2028 (commencing July 1, 2027 and ending June 30, 2028), determination of the most recent three years of enrollment shall be calculated on the basis of the New Operating Assessment Calculation as described in this Section IV (G), and the two years prior enrollments shall be calculated using the Prior Operating Assessment Calculation.
- (d) For Fiscal Year 2029 (commencing July 1, 2028 and ending June 30, 2029), determination of the most recent four years of enrollment shall be calculated on the basis of the New Operating Assessment Calculation as described in this Section IV (G), and the one year prior enrollment shall be calculated using the Prior Operating Assessment Calculation.
- (e) For Fiscal Year 2030 (commencing July 1, 2029) and all subsequent years, determination of enrollment shall be calculated on the basis of the New Operating Assessment Calculation as described in this Section IV (G).

**(H) Times of Payment of Apportioned Costs**

Each member town shall pay to the District in each fiscal year its proportionate share, certified as provided in subsection VI(B), of the capital and operating costs. Except as otherwise provided in subsection VI(A), the annual share of each member town shall be paid in such amounts and at such times that at least the following percentages of such annual share shall be paid on or before the dates indicated, respectively:

August 1	16.25%
October 1	36.25%
December 1	50.00%

February 1	67.50%
April 1	87.50%
May 1	100.00%

**(I) Special Funds**

The District School Committee shall not interfere with a town's or Local Education Council's use of trust funds or other special funds, including separate town meeting articles, intended for the enhancement of the educational opportunities for that town's pupils at the pre-K-6 grades only. The operations budget shall not be reduced by the receipt of such funds.

**ARTICLE 29.** To see if the Town will vote to amend the MOHAWK TRAIL REGIONAL SCHOOL DISTRICT – REGIONAL DISTRICT AGREEMENT by striking the following language contained in **Section VI – Budget:**

**(A) Tentative Maintenance and Operating Budget**

On or before February 8<sup>th</sup>, the Committee shall annually prepare a tentative maintenance and operating budget for the next fiscal year, including therein provision for any installment of principal or interest to become due in such year on any bonds or other evidence of indebtedness of the District and any other capital costs to be apportioned to the member towns in such year. The said budget shall be in reasonable detail, including the amounts payable under the following classifications of expenses and such other classifications as may be necessary:

1. Administration
2. Instruction
3. Other School Services
4. Operation and Maintenance of Plant
5. Fixed Charges
6. Community Services
7. Acquisition of Fixed Assets
8. Debt Retirement and Debt Service
9. Programs with Other Districts and Private Schools
10. Transportation

Copies of such tentative budget shall be mailed to the chairperson of the board of selectmen and finance committee of such town.

**(B) Final Maintenance and Operating Budget**

The Committee shall on or before March 1 in each year adopt an annual maintenance and operating budget for the next fiscal year, said budget to include debt and interest charges and any other current capital costs as separate items, and shall apportion the amounts necessary to be raised in order to meet the said budget in accordance with the provisions of subsections IV(E) and IV(F) and with the provisions of sub-section IV(G), provided however, that the Committee shall adopt said annual maintenance and operating budget for the next fiscal year not later than forty-five days prior to the earliest date on which the business session of the annual town meeting of any member town is to be held, but not later than March 1, and further provided that said annual maintenance and operating budget need not be adopted prior to January 18. The amounts so apportioned for each member town shall, within twenty days from the date on which the annual budget is adopted by the regional school district committee, and not later than March 10, be certified by the District treasurer to the treasurers of the member towns.

**(C) High School Operating and Maintenance Budget for the purpose of Determining Tuition**

For the purposes of determining tuition, the High School Operating and Maintenance Budget is defined as that portion of the budget relating to expenditures for high school level pupils in grades

seven through twelve, inclusive. Budget lines for shared high school and elementary school costs, including but not limited to Administration and Transportation, shall be apportioned by computing the ratio which the grades 7-12 average pupil enrollment in the regional district on October 1 of each of the five years next preceding the year for which the apportionment is determined bears to the total average pupil enrollment from all member towns in the Regional School District for the same five year period (note: pre-K enrollment will be included in the calculation beginning in FY18 and will include the data from October 1, 2015 and October 1, 2016). The High School Operating and Maintenance Budget shall not include any cost for capital debt retirement or debt service.

**(D) Vote on the Annual Budget**

For purposes of voting on the annual budget by the member towns, the approval of the District's annual budget by the town meetings of each pre-K-12 Member Town shall constitute two "units" towards approval or disapproval of the annual District budget, while Hawley and Charlemont shall have one "unit" each, with a total of ten units needed to approve the annual budget.

\*\*\*\*\*

**and replacing said language with the following:**

**(A) Tentative Maintenance and Operating Budget**

On or before February 15th, the Committee shall annually prepare a tentative maintenance and operating budget for the next fiscal year, including therein provision for any installment of principal or interest to become due in such year on any bonds or other evidence of indebtedness of the District and any other capital costs to be apportioned to the member towns in such year. The said budget shall be in reasonable detail, including the amounts payable under the following classifications of expenses and such other classifications as may be necessary:

1. Administration
2. Instruction
3. Other School Services
4. Operation and Maintenance of Plant
5. Fixed Charges
6. Community Services
7. Acquisition of Fixed Assets
8. Debt Retirement and Debt Service
9. Programs with Other Districts and Private Schools
10. Transportation

Copies of such tentative budget shall be delivered via mail or email to the chairperson of the board of selectmen and finance committee of each member town.

**(B) Final Maintenance and Operating Budget**

The Committee shall on or before March 1 in each year adopt by a two-thirds vote of the full Committee an annual maintenance and operating budget for the next fiscal year, said budget to include debt and interest charges and any other current capital costs as separate items, and shall apportion the amounts necessary to be raised in order to meet the said budget in accordance with the provisions of subsections IV(E) and IV(F) and with the provisions of sub-section IV(G), provided however, that the Committee shall adopt said annual maintenance and operating budget for the next fiscal year not later than forty-five days prior to the earliest date on which the business session of the annual town meeting of any member town is to be held, but not later than March 1, and further provided that said annual maintenance and operating budget need not be adopted prior to January 18. The amounts so apportioned for each member town shall, within thirty days from the date on which

the annual budget is adopted by the regional school district committee, and not later than March 31, be certified by the District treasurer to the treasurers of the member towns.

**(C) High School Operating and Maintenance Budget for the purpose of Determining Tuition**

For the purposes of determining tuition, the High School Operating and Maintenance Budget is defined as that portion of the budget relating to expenditures for high school level pupils in grades seven through twelve, inclusive. Budget lines for shared high school and elementary school costs, including but not limited to Administration and Transportation, shall be apportioned by computing the ratio which Grade 7-12 students who reside in member towns and are included in the District's foundation enrollment for each of the most recent five years bears to the District's total foundation enrollment for Grades Pre-K to 12 for the same five-year period, expressed as a percentage of the total to the nearest one-hundredth of one percent. The High School Operating and Maintenance Budget shall not include any cost for capital debt retirement or debt service.

**(D) Vote on the Annual Budget**

Consistent with Chapter 31 of the Acts of 2017, for purposes of voting on the annual budget by the member towns, the approval of the District's annual budget by the town meetings of each pre-K-12 Member Town shall constitute two "units" towards approval or disapproval of the annual District budget, while Hawley and Charlemont shall have one "unit" each, with a total of ten units needed to approve the annual budget.

**ARTICLE 30. To see if the Town will vote to amend the MOHAWK TRAIL REGIONAL SCHOOL DISTRICT – REGIONAL DISTRICT AGREEMENT by striking the following language contained in Section XV Effective Date:**

This amended Agreement shall take full effect in accordance with its terms on July 1, 2018 and shall supersede the prior District Agreement, including any prior amendments.

\*\*\*\*\*

**and replacing said language with the following:**

This amended Agreement shall take full effect in accordance with its terms, following approval by all member towns and by the Commissioner of Elementary and Secondary Education, on July 1, 2024, and shall supersede the prior District Agreement, including any prior amendments. Nothing in this amended Agreement shall affect the apportionment of assessments to member towns prior to Fiscal Year 2026.

**ARTICLE 31. To see if the town will vote to raise and appropriate by taxation \$13,483 to fund upgrades of the telephone infrastructure at Buckland Shelburne Elementary School to support enhanced 911 emergency communications at such school, including costs incidental or related thereto. Said sum is to be expended under the approval of the School Committee's Building Subcommittee, or take any other relative thereto.**

**ARTICLE 32. To see if the town will vote to raise and appropriate by taxation \$3,621 to fund upgrades of the telephone infrastructure at Mohawk Trail Regional School to support enhanced 911 emergency communications at such school, including costs incidental or related thereto. Said sum is to be expended under the approval of the School Committee's Building Subcommittee or take any other relative thereto.**

And you are directed to serve this Warrant, by posting attested copies thereof at two public places in said Town, seven (7) days at least before the time of holding said meeting.