



8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

www.8towns.org

Analysis of RSDPB Models

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Executive Summary

Coming soon!

Table of Contents

Executive Summary	1
Purpose of Brief	3
RSDPB Context	4
RSDPB Efforts to Date	7
Research Team & Process	8
Team Findings	15
Regionalization, described	22
Collaboration, described	29
Models, Defined	46
Models, Assumptions	50
Models, Financial Introduction	55
Models, Evaluation Introduction	69
Model A: Full K-12 Regionalization	73
Model B: Shared Regional High School	88
Model C: Collaboration	100
Models: Additional Options	113
Models, Summarized Fiscal Analysis	116
Models, Summarized Evaluation	122
Preferred Model, Recommendations, Next Steps	127
Closing	148
Appendix	150

Purpose of Brief

Purpose & Essential Question.

The purpose of this brief is to present a final analysis of the three models identified by the Regional School District Planning Board (RSDPB) as possible options for collaboration and/or consolidation between the Berkshire Hills Regional (3 towns) and Southern Berkshire Regional (5 towns) school districts. This 8-town analysis includes a summary of the research process to date, synthesized research findings, evaluation of each model, recommendations, and potential next steps.

This project is driven by a simple, essential question:

Can the two school districts (8 towns) function better together or separately?

While the answer to this question is multifaceted and includes a number of important considerations (educational, fiscal, political, social, cultural, and organizational factors) that will be discussed throughout this analysis, when all is settled the value proposition (educationally and fiscally) associated with working together (or not) is core to the RSDPB process.

RSDPB Context

RSDPB Formation.

The RSDPB was formed under state statute ([M.G.L. c. 71, § 14](#)) in 2020 and consists of up to 24 members, three from each of the eight towns (including one who is a school committee member) - appointed by the town moderator. The RSDPB is exploring collaboration and consolidation possibilities between Berkshire Hills Regional School District (BHRSD) and Southern Berkshire Regional School District (SBRSD).

Members.

Charles Ketchen	Alford
Lucy Prashker	Alford (RSDPB, Chair)
George McGurn	Egremont (Operations subcommittee , Chair)
Thomas Berkel	Egremont
Danile Kelly	Egremont (school committee)
Deb Phillips	Great Barrington (Educational quality subcommittee, Chair)
Peter Taylor	Great Barrington (RSDPB, Vice-chair)
Stephen Bannon	Great Barrington (school committee)
Donald Coburn	Monterey
Jonathan Sylbert	Monterey
Laura Rodriguez	Monterey
Susan Smith	New Marlborough
Tara White	New Marlborough
Jane Burke	New Marlborough (school committee)
Colin Smith	Sheffield
Nadine Hawver	Sheffield
Bonnie Silvers	Sheffield (school committee)
Nick Fredsall	Stockbridge
Patrick White	Stockbridge
Sean Stephen	Stockbridge (school committee)
Marie Ryan	West Stockbridge
Roger Kavanagh	West Stockbridge (Finance subcommittee, Chair)
Molly Thomas	West Stockbridge (school committee)

RSDPB Subcommittees.

The committee maintains five subcommittees including: Educational Quality, Finance, Community Outreach and Engagement, Operations, and Project Management. All notes, minutes and presentations are available at 8towns.org. Link to access RSDPB [Who We Are](#).

RSDPB Charge.

The Regional School District Planning Board (RSDPB) was formed under statute to:

1. Study the fiscal and educational advisability of establishing a regional school district, organization, operation, control, constructing, maintaining, and operating to serve needs
2. Develop an estimate of construction and operating costs
3. Assess the education soundness, methods of financing, and any other matters pertaining to the organization and operation of a consolidated regional school district
4. Report the board's findings to the selectboards of the eight towns

Why is this study necessary?

Over the last 20 years, and perhaps longer, our public schools have been faced with a sharp decline in student enrollment that is projected to continue, rising operations costs (i.e. technology, benefits, special programming, transportation), declining/flat revenues resulting in towns bearing a greater fiscal burden of total school funding, all impacting our districts' ability to offer a comprehensive and diverse range of educational programs, services, supports, and enrichment opportunities available to students. This has led to a desire to consider the educational and financial advisability of various possible consolidation options.

Overall Project Aim.

Our aim is to develop **community-informed solutions** to the challenges that our schools/districts face. By strengthening our public education infrastructure, we endeavor to: build access to educational programs that ensures positive outcomes for our students; respond to the fiscal realities of our communities, and; bolster the economic vitality of our region. As such, this project will explore and test community options to the challenges facing the BHRSD and SBRSD school districts. If we are successful, we will ensure a rich, rigorous, high quality, and equitable education for all students in the BHRSD and SBRSD schools, and remain a place known for great schools, a high quality of life, and a place where you want to raise your kids.

What guides this effort?

This process is governed by Massachusetts General Laws and Regulations ([M.G.L. c. 71, § 14.](#)) and ([603 CMR 41.00](#)). Available supporting [guidance documents](#) have been developed by the Massachusetts Department of Elementary and Secondary Education and the Massachusetts Association of Regional Schools. The process is described as consisting of two phases, which will be described in greater detail later in this brief, but are outlined below:

Phase I: Consideration and study of forming, expanding, or enlarging a regional school district.

Step 1. Preliminary Discussions

Step 2. Regional Planning Committee and Regional Planning Board

Step 3. Develop Regional Agreement and Long-Range Plan

Step 4. Submission of Proposed Regional Agreement for Public Review

Step 5: Voter and State Approval

Phase II: Beginning as a new regional school district, with a range of necessary transition tasks such as school committee formation, policy development, subcommittee organization, etc.

Currently, the RSDPB is in Phase I, moving through Steps 1 & 2 (in red). What emerges from Step 1 is the confirmation of a regional school model (among a range of options) that allows for deeper analysis of the implications (benefits and challenges) in Step 2. In Step 2, there is an advised deeper dive into a variety of functional areas such as finance, student flow, and educational quality for example, as well as community outreach and engagement that informs the research process.

Ideally, this will equip the RSDPB with enough information to advance *through* Phase I, Step 2 and reach a recommendation to regionalize, to collaborate, or stay as is... based on careful study and significant community input. That decision may potentially lead to steps 3, 4, and 5, the development of a regional agreement and long-range plan (operational and education), that is then submitted for Department of

Elementary and Secondary Education (DESE) and public review, and approval by the DESE Commissioner and voters.

Project Goal.

The goal is to explore whether there are opportunities to increase district capacity (through collaboration or consolidation) in order to provide all children within the eight towns with a broad array of ***high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and their community.***

Specifically, work in this stage of the RSDPB effort is designed to advance through Step 2 of the planning process, which will include additional data analysis, outreach to the community, and general modeling of collaboration and/or consolidation models that range from expanded shared services, merger of the two high schools, to full preK-12 consolidation of the two districts. **The deliverable is an evaluation of these options (this report) that includes initial community perspectives and enough information to consider moving ahead with a preferred model.**

RSDPB Efforts to Date

Efforts.

Since its formation in 2020, the RSDPB has conducted a number of activities to move ahead in organizing, planning, research, and community engagement. A brief synthesis of efforts to date include:

- Engaged a facilitator to educate RSDPB board members on norms for communication, group process, and decision making among the board's 24 members. The DiSC tool for productive conflict was used in this training.
- Engaged the Massachusetts Association of Regional Schools (MARS) to provide certain preliminary reports analyzing baseline financial data ("as is" model), district facilities and the respective "Unit A" collective bargaining agreements of each district. Analyzing enrollment data and trends, MARS made certain financial projections for each of the two districts assuming continuation of the current models of operation.
- Secured a Project Manager and research team to extend the analysis of the educational and financial advisability of three potential models including: Full consolidation of the two districts, merger of the high schools only, and expanded shared services between the two districts.
- Developed a work plan that follows the regionalization process guideline in moving towards a preferred option.
- Conducted extensive community outreach through interviews, focus groups, and a widely circulated survey targeted at students, parents, staff, and community members.
- Advanced organizational & communication efforts through subcommittee formation and a comprehensive website.
- Produced detailed reports that document historical effort and examine fiscal, educational, and operational implications of the existing districts and the various models.
- Secured a relationship with Federal Mediation Conciliation Services, in support of Board facilitation.
- Established a fiscal relationship with the DESE in support of ongoing research and planning activities.

As stated, a comprehensive website at 8towns.org (or rsdpb.org) includes a detailed set of documents, reports, presentations, meeting minutes, and news that serve as historical evidence of RSDPB effort and work-product to date. Link to a summary [RSDPB Process Flyer](#).

Research Team & Process

The Research Team.

The current research team, led by Project Manager H. Jake Eberwein, joined the RSDPB effort in June 2021. We have relied on (and are thankful for) a number of leading and supporting researchers/staff including:

H. Jake Eberwein, Project Manager & Research Lead
Kenneth Rocke, Research/Strategy
Sarah Carleton, Research/Data
Robert Putnam, Research/Education
Mary Nash, Evaluation and Community Outreach
Frank Cote, Career Vocational Technical Education
Hanover Research, Research and Literature
Abrahams Group, Finance
Emilia Eberwein, Data Analysis
Bill Ballen, Special Education/Collaboratives
Mary Budzn, Administrative Support
Carolyn Alexander, Website
Topic Specific Support (Josh Shaw - IT; Marie Massini - Transport; Anna Tupper -SPED)
Additional support provided by (many not listed):
 BERK Team (Catherine McKeen, Justin Martin, Brendan Sheran)
 Many individuals/networks/organizations
 (DESE, Department of Revenue, MASC, MASS, MARS, MOEC)
Members of the RSDPB
School Personnel in BHRSD and SBRSD

Work Plan.

The team prepared a [work plan](#) that included three broad stages of (overlapping) work:

- Pre-work and context setting (June - September)
- Benchmarking and option modeling (September - February)
- Preferred modeling (December - March)

This document serves as the culminating product of these three stages.

Broad Tasks.

While the work plan has detailed descriptions of the various stages and the specific tasks contained within, broad Research Team tasks included:

- Gather and analyze relevant data regarding educational, financial, and operational functions
- Conduct an educational feasibility study, including researching and analyzing best practices in the context of possible collaboration and consolidation options
- Conduct an operations and transportation analysis
- Develop a survey and conduct focus groups to solicit community input
- Develop “evaluated” options for community input, including three potential models along a collaboration-consolidation continuum
- Present and evaluate these options with specific attention on the following functional domains: Educational Quality, Fiscal Systems, & Operational Factors

- Establish a value proposition that considers benefits (advantages), barriers (challenges), opportunities, and innovations
- Engage with public to inform, involve, and solicit
- Position the RSDPB to consider continued regionalization planning in Phase I, Step 3 of the process

The deliverable is intended as an evaluation of options, a report that provides a sense of community perspectives, and enough information to consider moving ahead with a preferred model.

Research

Research Questions.

Within each model (including the default position of “as is”) we have been guided by an overarching question that includes several prompts:

Can some form (model) of district collaboration/consolidation/regionalization between BHRSD and SBRSD

- Improve educational access, opportunity, and (potentially) outcomes for students?
- Finance schools in a way that stabilizes (or reduces) the burden on local taxpayers and/or leads to available funds for new educational investments that raise access and opportunities for students and staff?
- Lead to greater efficiencies and services in district operations, staffing, and programming that offset current and expected demographic trends?
- Result in an inclusive, equitable school model that reflects local identity, is an ongoing point of pride for the eight towns, and serves to retain and attract residents and businesses in BHRSD/SBRSD as a place to live, learn, work, and play?
- Yield solutions that are based on collaborative rather than competitive advantage, and foster innovative approaches to rural education?
- Increase district capacity to provide all children with a broad array of high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and their community?

Research Considerations.

A challenge of any research process is identifying those indicators of high importance to the study and to the community. There are a variety and significant number of indicators that can be used to measure educational systems and outcomes, thus we curated a limited subset that could be easily expanded (and certainly debated). We settled on indicators that capture patterns, tell a story, and will address both our research questions and, more broadly, the problem that brings us all to this study.

First, data was examined and pooled through both qualitative (subjective, holistic and process-oriented, narrative) and quantitative (objective, focused, outcomes- oriented, numerical). Second, as we were able, we examined data as:

- **Benchmarked.** Data compared against other sets such as peer schools/districts, county/state/national averages, industry standards (i.e. SAT, AP)

- **Trend.** Data examined over time (past and future). We anticipate using five-year historical lookback, with a ten-year single point-in-time look-back
- **Disaggregated.** Data broken into categories/subgroups such as gender, economics, race/ethnicity, town, region

Third, our research was conducted as objectively and as consistently with research traditions as possible, striving for a high level of research integrity. However, it did not entail institutional or peer review. Also, as community-based research, we were also asked to bring our professional experiences and judgment to the table, which we have.

Fourth, any modeling (fiscal for example) requires assumptions and parameters. These were determined by the research team and detailed at the point of analysis. These assumptions/parameters can be adjusted as is useful to future study.

Finally, our data sets should not be considered exhaustive or complete and, as such, should be challenged by stakeholders to support informed decision making forward. It is fully expected that additional and deeper analysis will be needed as the RSDPB planning effort proceeds.

Research/Team Process.

It is a challenge to capture all the work conducted by both the RSDPB and the Research Team. A summarized snapshot includes:

- The development of a project plan and timeline
- Development of a website and ongoing outreach/PR materials
- A review of historical literature and regionalization/collaborative efforts
- A comprehensive community survey of staff/faculty, students, and community members
- Examination of baseline data, going beyond what the 2020 MARS study provided for each district
- Participation in subcommittees and full committee meetings including presentations at each
- Interviews and focus groups
- Benchmarking of existing comparative efforts, as well as best practices
- Analysis of key district indicators such as finance, educational opportunities, enrollment, student flow, CVTE - for example
- Production of a range of topic-specific reports and presentations that will serve as ongoing resources for the RSDPB effort
- Outreach to networks and experts (organizations and individuals) to draw from and access both experiences and expertise
- Modeling of various staffing/fiscal/operations options
- Evaluation of three models, with sub-scenarios for fiscal impact, educational impact, and feasibility
- General support for funding applications, budget and contract tracking/management, and administrative tasks such as meetings/minutes/outreach

Our Research Team met at least weekly (in some cases 4-6 times per week), planning tasks, reporting progress, collaborating on analysis, preparing work products (presentations and reports) and reviewing/critiquing work products. We participated in approximately 50 full board or subcommittee meetings (accessible [here](#)).

Team Production.

As mentioned, the team's work involved a variety of conversations, planning work, research, and analysis that is greatly represented in the various reports and presentations. Reports and Presentations to date include (can be accessed through the interactive links):

- Team work plan ([narrative](#))
- Historical Review ([narrative](#) & [presentation](#))
- Enrollment Analysis ([narrative](#) & [presentation](#))
- State and Local Funding ([presentation](#), [transcribed narrative](#))
- School District Organization ([presentation](#) & [transcribed narrative](#))
- Survey and Focus Groups ([narrative](#) & [presentation](#))
- Student Flow ([presentation](#), [narrative](#))
- Educational Quality ([presentation](#) & [introductory narrative](#), [full narrative](#))
- Career Vocational Technical Education ([narrative](#) & [presentation](#))
- Buildings and Capital ([narrative](#))
- Transportation ([narrative](#))
- IT ([narrative](#))
- Special Education ([narrative](#))
- Hanover Research Project #1 ([original report](#) & [updated report](#))
- Collaboratives & Collaboration ([narrative](#))

These reports will be referenced throughout this brief in sharing and applying key findings, while making available the details behind these findings.

Research and Team Assertions.

All research must set parameters, assumptions, and beliefs that underscore analysis and/or modeling. We combine these into a category we describe as **assertions**. These were established through a team process, and by considering the various feedback we have received from the RSDPB board and stakeholders. These considerations will be emphasized at certain points throughout this analysis, and are outlined below:

- While trend analysis helps us to project into the future, projections are limited, imperfect and can be influenced by unpredictable and unanticipated factors.
- The level of research and detail produced in these reports is intended to stimulate an informed discussion of the models in order to equip the RSDPB with enough information to reach a decision regarding a preferred model and direction. However, an additional level of detail, driven by key decisions, is and will be necessary to answer ongoing questions in the modeling work (i.e. - school building use, transportation) given the fluid nature of this ambitious, multi-faceted effort.
- While the three models provide a broad framework within which our research team worked, within each model there are numerous decision points and multiple scenarios that are possible. Our team used best judgment in selecting what we believe are the most likely and advantageous scenarios. There were instances in which we included scenarios we felt were less advantageous and/or unlikely to happen, if for nothing else than to eliminate them as viable solutions.

- There are likely additional models and options, as we often suggest “the space between solutions,” that may be of interest to the RSDPB and the community. This analysis serves to explore three points along a continuum of organizational options, a continuum that likely contains many waypoints between these three models.
- We recognize that there have been and continue to be important considerations raised by stakeholders, and reinforced in the regionalization literature, related to:
 - Operation and protection of elementary schools
 - Reasonable travel/bus ride times
 - Avoidance of job loss
 - School closures
 - Class size
 - Community/school identity and culture
 - Organization and governance

These factors, and others, were part of the team’s process as we considered educational value, fiscal value, and feasibility (social, organizational, and political).

- Our team attempted to work as consistently as possible within particular time periods, but this was not always possible based on reporting schedules (finance), changes to state assessments (MCAS), or the influence of COVID on particular indicators over the last two years. That said, a consistent apples-to-apples comparison was our aim.
- In considering fiscal impact, our team set parameters in order to examine each model/scenario based on a **range** rather than a fixed value. These included, for example:
 - Staff salaries
 - Class size
 - Staffing levels needed to deliver and manage
 - Assessment procedures
 - Potential reinvestment options
 - Building use
 - Travel time

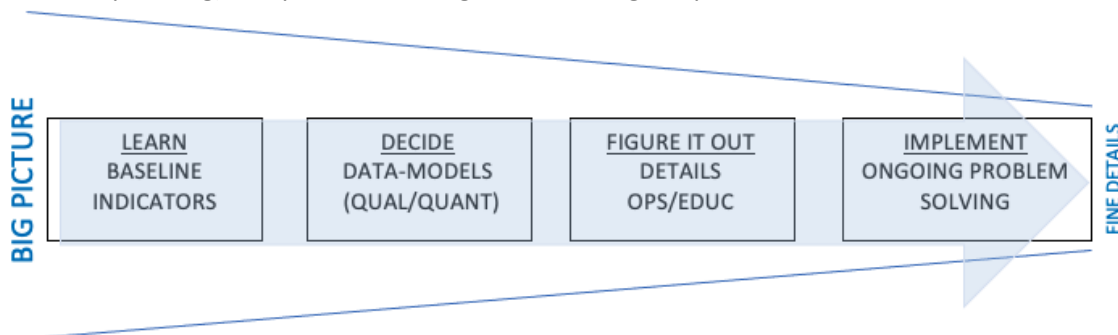
These were established by the team. The good news is that the tools created for scenarios can be readily manipulated to model alternative options based on adjusted parameters as the board requests.

- While historical fiscal year data was used to examine trends, the modeling scenarios were based on the FY21 actual data as obtained by the districts. Our team worked to match this data across both districts, and believes this approach offers the most accurate representation for the various models. *Note, additional methodologies and assumptions will be included throughout this brief and are captured in the various subject-specific reports.*
- Our team recognizes that:
 - **Change** (of this magnitude) comes with social, cultural, and emotional impact. While we strive to be objective and accurate in our work, we recognize that these less quantifiable factors are significant.

- **This is a lot and...this is barely anything.** This project was not intended to be a full audit of all aspects of the school districts and towns (for example, a deep dive into teaching-and-learning), but rather enough to move towards an informed decision and direction. As such, there will be a need for ongoing detail, research, problem solving....and ongoing data.
- **Using data is essential, acknowledging that it can be overwhelming.** As has been shared in several supporting documents, there are an inordinate number of potential data points and indicators. Moreover, data can be presented and sliced in an infinite number of ways. This can overwhelm and confuse stakeholders as they struggle to make sense of it all. Yet data must remain at the foundation of informed decision making, monitoring and evaluation. Key/primary (performance) indicators (as mentioned above) can and should be used, recognizing that there is a significant level of additional detail and nuance that exists *behind* these indicators.
- **There is good work already happening,** in both districts and across the region. We strive to capture and include these, not as new or a reflection of glaring deficiencies, rather to advance and support those programs, ideas and aspirations that currently exist—and promote/scale them across the 8 towns.
- The notion of how “schooling” is done (approach, beliefs, and philosophy) is often **formed by our own experiences.** Thus, to the degree that we can learn from, borrow, and even experience alternative/new approaches will help to form a construct for potential change/vision.
- **All models present gains and losses,** benefits and risks, and value propositions and obstacles. These vary by district, town, and stakeholder group. As such, there are multiple audiences that will likely hold different and, in some cases, competing priorities.
- The formation of a new regional school district is an **extensive process** that will involve a number of steps and negotiations involving prospective member towns, who ultimately decide. An undertaking this ambitious will only succeed with consistent stakeholder input, a willingness to both make sacrifices and concessions, opportunities to plan and shape a vision together, and an incredible amount of hard work and ongoing problem solving.
- **Built from the ground up, made to stick.** We believe in the power of constructing solutions based on the perspectives and experiences of those impacted, in the community. Design solutions that are informed by evidence (data) and grounded in resident and stakeholder experience, rather than via an administrative/top-down directive, generate the ownership that is needed to cultivate excitement, commitment, and long-term ownership.
- Work towards **collaborative/complementary rather than competitive** solutions. Recognizing individual strengths and some degree of readiness/willingness can encourage the creation of complementary solutions that reduce competition for existing or new resources and advance organizational participation and commitment.

Articulating mutually reinforcing outcomes can create win-win situations across organizations.

- **Geography matters.** Solutions that appear sound may fail as a result of simple geographic barriers, including real (or perceived) travel distances. Travel times must be considered as aligned with developmentally appropriate (age) practices, and innovative approaches should be considered (i.e. use of private, shuttles, remote learning). Travel barriers may be compounded by town line identity and perceptions of cultural differences between communities (factors such as safety, diversity, size, etc.)
- **Apply high-impact, low-effort matrix.** As potential investments are considered, it logically follows that the easiest thing to do, with the highest potential return on investment, should be the preference. Often, complicated solutions that are difficult and expensive can appear appealing, but are often difficult (near impossible) to enact. It is advised, then, when potential solutions are considered that they be evaluated based on this quite simple impact-effort matrix.
- **In research, there is always something that you've missed,** errors you've made, questions you've left unanswered, assumptions you've gotten wrong. Still, what remains are the general themes and ideas that emerge and a holistic view. Moreover, this process has included building tools and ways to approach & understand complex systems, and these tools will allow us to adjust parameters and evaluate alternative models/scenarios as they emerge.
- **This is far from done....and will probably never be done.** As mentioned, this work is challenging and is trend setting (two regional districts considering the formation of a super region). We are working through a process (below) that begins with learning more about our system (baseline indicators), learning enough to make a decision (quantitative and qualitative data), and then filling in the details (operational and educational planning) and problem solving to and through implementation.



- **You know a lot of this already.** Much of what we capture is information that has been previously studied, has been experienced by stakeholders across the community, and has been the topic of conversations in board meetings, at the dinner table, and at the water cooler. By capturing a wide range of information, we aim to organize and present a coherent set of considerations for the RSDPB and the broader community to examine.
- Our team comes to this process with a desire to start with the facts and to integrate the human elements, all while maintaining a **hopeful vision of what is possible.**

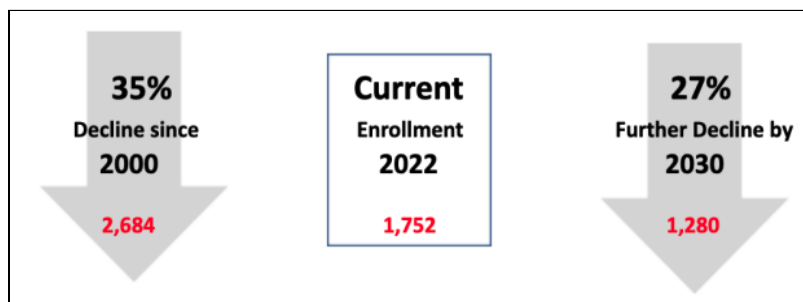
Team Findings

A comprehensive accounting of the findings is available in the many reports and presentations shared over the last six (plus) months. These are available on the [Resources](#) page. Additionally, a synthesis of findings was presented on February 9th to the full board and is available [here](#).

Below is a **top eleven** list of findings that we believe are critical to the 8 Town process and will influence potential solutions, curated from the research to date:

1. Enrollment is declining and is projected to continue to decline.

- From 2000-2022, enrollment in our two districts dropped by 35 percent. By 2030 enrollment will have dropped by a projected 52%, to 1,280.
- Aging populations, declining birth rates, and shifts in housing patterns mean fewer school aged children per household.
- There is substantial student flow (movement) between schools in south county through school choice, tuition, private/parochial, and homeschooling.
- More SBRSD students (114) use school choice to attend school in BHRSD than BHRSD students (47) who use school choice to attend school in SBRSD. 25% of SBRSD residents students in Grades 7-12 attend school in BHRSD.
- Enrollment pressures lead to reduction in educational programs and services, competition between districts, inefficiencies across organizations, and lessened professional culture.



Link to [Enrollment report](#)

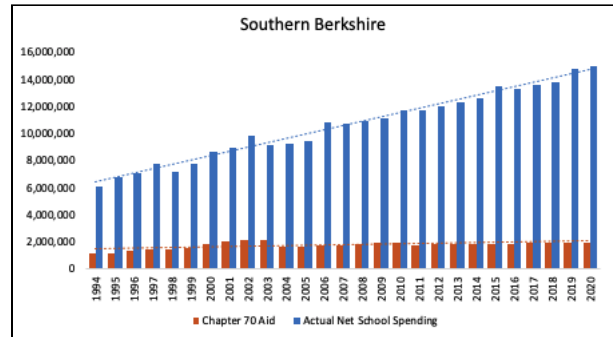
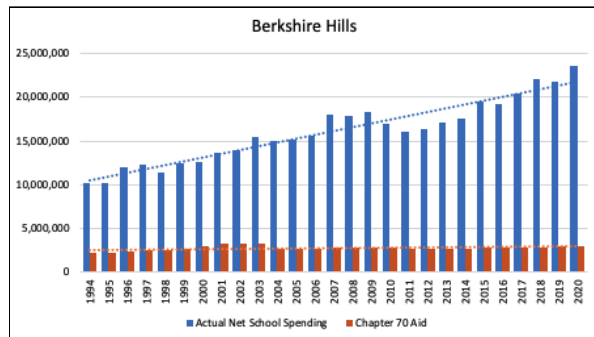
Link to [Student Flow report](#)

2. The cost of operating schools has risen steadily, while state aid has remained essentially flat. This has placed the additional burden of funding the schools on the towns/local taxpayers.

- All 8 towns are at the local limit of Chapter 70 aid percentages (17.5%).
- Both districts are likely to receive minimal aid (typically \$30/student) through the Student Opportunity Act.
- All 8 towns contribute substantial amounts above state-required minimums.

Link to [State and Local Aid Transcribed Narrative](#)

Below, actual net school spending is represented by blue bars, while Chapter 70 is indicated by orange bars.



3. The two districts have much in common.

- Both districts have unique strengths and are doing much with existing (limited) resources.
- Spending, salaries, retention, attendance, student programming, student indicator and outcomes data are, in many instances, similar.
- District and school improvement plans overlap with a focus on contemporary proficiencies and skills (including high school pathways), professional and district culture, and community engagement/communication.
- Both districts highly value personalized/small learning with strong adult-student connections.
- There is an opportunity to build a shared 8 Town vision.

Link to [Education Presentation](#)

BHRSD	SBRSD
Portrait of a Graduate project (vision for high school success based on proficiencies) - assessments to support	Well defined learning outcomes with a focus on depth/critical thinking , student-centered instruction
Professional Learning Culture - Instructional Leads and Groups to focus on equitable outcomes, student-centered learning, community engagement	School/District Culture - inclusion and equity, tools & infrastructure, social emotional learning. Updated facilities.
Community Engagement - stakeholders, families, shared ownership, equitable and consistent strategies	Pathways for students towards resilient, curious, ethical citizenry. Personalized and blended learning, infused with technology. Effective relationships and engagement with community

4. There is room for educational growth in both districts, such as:

- Student outcomes (i.e. MCAS, SAT, AP),
- Student opportunities (CVTE, electives, early-K, after school),
- Professional culture (Professional training, coaching, intervention),
- Curriculum resources and alignment,
- Talent recruitment and development, and
- Shared educational visioning and alignment with progressive/contemporary practices.

Link to [Education Presentation](#)

2019							
	Gr 3-8 ELA % meet/ exceed	Gr 3-8 Math % meet/ exceed	Gr 5, 8 Science % meet/ exceed	Gr 3-8 ELA student growth	Gr 3-8 Math student growth	Gr 10 ELA % meet/ exceed	Gr 10 Math % meet/ exceed
Berkshire Hills	51%	42%	41%	57.7	55.5	65%	64%
Southern Berkshire	46%	33%	40%	48.5	48.1	84%	65%

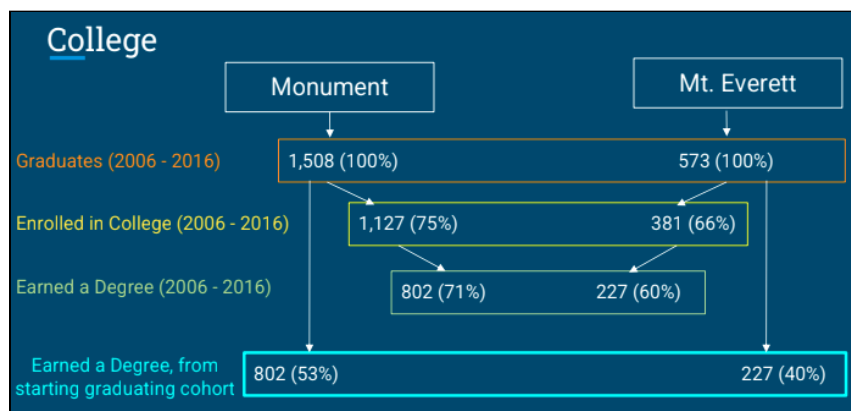
2021							
	Gr 3-8 ELA % meet/ exceed	Gr 3-8 Math % meet/ exceed	Gr 5, 8 Science % meet/ exceed	Gr 3-8 ELA student growth	Gr 3-8 Math student growth	Gr 10 ELA % meet/ exceed	Gr 10 Math % meet/ exceed
Berkshire Hills	43%	28%	35%	34.0	23.8	75%	58%
Southern Berkshire	39%	18%	37%	34.8	20.7	66%	38%

Grade 3 Reading is Foundational
Grade 10 is Graduation required

5. Graduates need developed pathways that prepare them for college & career.

- Of all graduates, 40-53% earn a college degree in six years.
- There are only two CVTE (Chapter 74) programs in south county, 47 total students. (compared to 506 in north county and 406 in central county). There is interest and need regionally for expanded CVTE programs.
- Advanced Placement and Dual Enrollment have room for expansion.
- Both districts offer a range of electives that provide non-Chapter 74 pre-career content and experiences.
- Students who go directly to work, or return from college without a degree, earn wages that are below “basic living wage” levels.
- Internships, while important, do not replace intensive Chapter 74 programs.

Link to [Education Presentation](#) and [CVTE Narrative](#)



6. The current school buildings are well under-capacity, with three that do not meet the Massachusetts School Building Authority's (MSBA's) highest facilities ratings.

- Ongoing upkeep of buildings has been excellent.
- A number of facility reconfigurations are possible, with careful consideration of travel distances and maintenance of elementary schools.
- Capital debt for BHRSD is completed in 2024, and in SBRSD in 2032.
- The Monument reconstruction project ([approved by the MSBA](#) for eligibility period) offers a unique opportunity and, regardless, will have a significant impact on the RSDPB effort.
- Class size balancing, as a result of school consolidation/merger/closure, offers a substantial opportunity for fiscal savings/reinvestments.

Link to [Buildings and Capital Report](#)

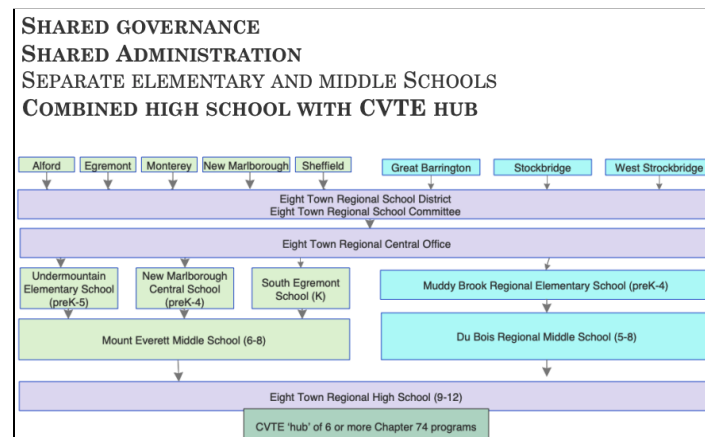
School Capacity, 2022 and 2030

District	School	Grade Start	Grade End	Enrollment Capacity	2022 Enrollment (w PK)	2022 % capacity	2030 Enrollment (no PK)	2030 % capacity
Berkshire Hills	Muddy Brook ES	PK	04	525	327	62%	254	48%
Berkshire Hills	Monument Mt Reg'l High	09	12	700	512	73%	430	61%
Berkshire Hills	W.E.B. DuBois	05	8	500	349	70%	257	51%
TOTALS					1188		941	
Southern Berkshire	New Marlborough Central	PK	04	150	66	44%	45	30%
Southern Berkshire	South Egremont	K		21	13	62%	10	48%
Southern Berkshire	Undermountain	PK	5	700	250	36%	179	26%
Southern Berkshire	Mt Everett Regional	6	12	650	304	47%	203	31%
TOTALS					633		437	
OVERALL CAPACITY				3246	1821	56%	1378	42%

7. While both districts run relatively lean, there remain organizational and operational redundancies, inefficiencies, and gaps.

- Alignment is challenging with independent structures, contracts, and policies.
- Functions are redundant across systems (back-office, IT, curriculum, facilities, reporting).
- Shrinking resources have placed pressures on existing role types (data, reporting, grants, supervision).
- This leads to multiple overlapping systems that are not making the most efficient use of available resources that would be likely in a more consolidated (8 - 12 towns) model.
- Collaboration is ongoing, yet limited in scope and durability. However, it manages against governance (loss of local control) concerns.
- The cost-center approach is a unique solution used to balance operation of existing schools with budgeting and governance considerations.

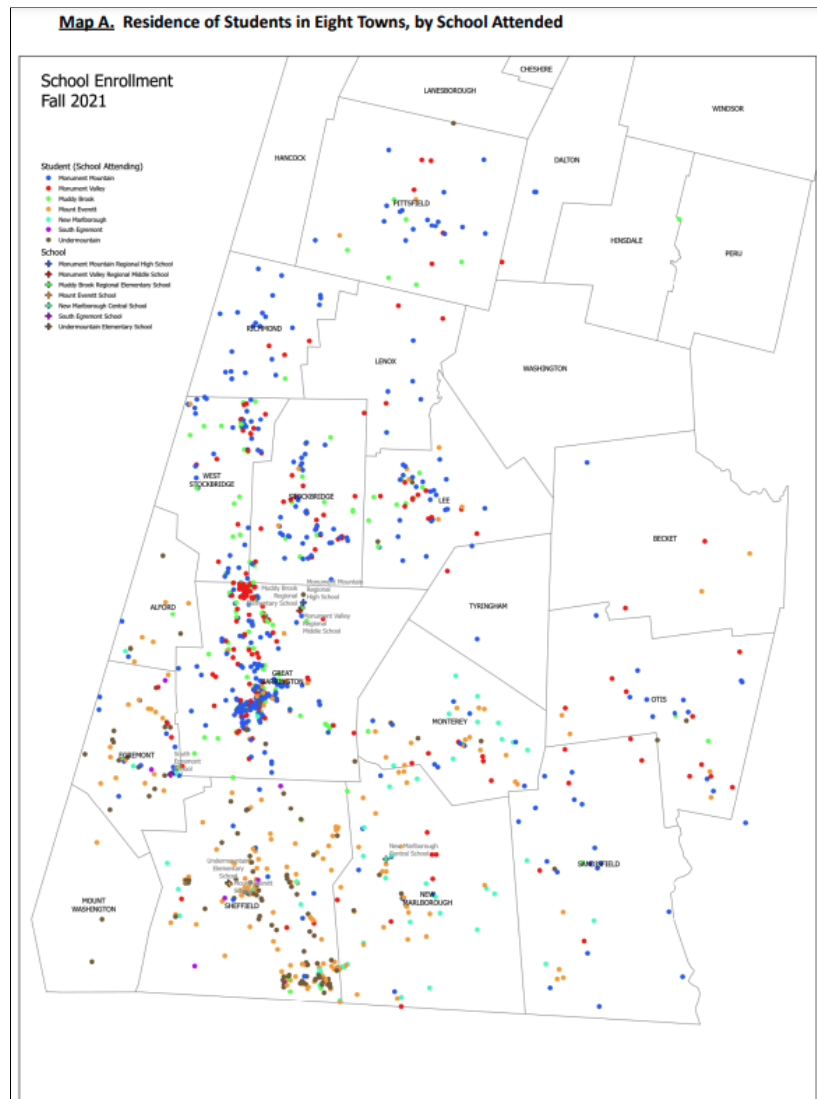
[Link to Organizational Models Presentation Transcription](#)



8. Transportation is a key element in any collaboration/regionalization consideration with careful attention paid to developmentally appropriate (age) transit times.

- BHRSD uses a two-tier system while SBRSD uses a one-tier system, with average BHRSD routes just over 30 minutes (middle/high) to just over 20 minutes (elementary), while average SBRSD routes are just over 40 minutes for all.
- Both districts rely on regional transportation reimbursement, which varies year-to-year, and will be of greater importance given rising transportation costs. Advocacy for this funding stream must be ongoing.
- Of seven scenarios modeled, those resulting in grades 9-12 or 7-12 in Great Barrington will likely not change costs, resulting in a mix of both shorter and longer runs.
- Collaboration would require both alignment of the high school schedules and a shuttle bus, while a single region if determined as preferable, will require decisions/policies related to redistricting of elementary schools and intradistrict school choice.
- Final fiscal calculations related to transportation will be dictated by school building and student assignment.

Link to [Transportation Report](#)



9. Leading into and since the formation of SBRSD (1953) and BRHSD (1965), there have been ongoing studies, planning committees, and conversations regarding potential collaboration and mergers.

- BHRSD and SBRSD have been successfully engaging in informal and formal collaboration.
- Recurring themes have included educational quality, vocational opportunities, declining enrollment, and fiscal efficiencies.
- The most recent studies (1986 and 2007) recommended regionalization, which failed to happen.
- Both engaging stakeholders and leadership are key to any regionalization effort.

Link to [Historical Review report](#)

1950-51	REGIONAL SCHOOL DISTRICT PLANNING BOARD AND SUBSEQUENT FORMATION OF THE SBRSD
1964-65	THREE TOWN REGIONAL SCHOOL DISTRICT PLANNING COMMITTEE AND SUBSEQUENT FORMATION OF THE BHRSD
1969-1976	VOCATIONAL EDUCATION STUDY AND THE SUBSEQUENT FORMATION OF THE SOUTH BERKSHIRE EDUCATIONAL COLLABORATIVE (SBEC)
1985-88	BHRSD/SBRSD MERGER STUDY
1991 & 1996	BHRSD/SBRSD TALKS
2008-2009	INDEPENDENT ANALYSIS FOR OPPORTUNITIES TO CONSOLIDATE
2015	SOUTHERN BERKSHIRE SHARED SERVICES PROJECT
2018	SOUTHERN BERKSHIRE EDUCATIONAL FUTURE (SBEF)

10. Case studies indicate that regionalization has both significant challenges, and potential benefits.

- School closures (consolidation) are frequently required to achieve true economies of scale.
- Perceived governance imbalances are primary obstacles to district reorganization.
- Reorganization (with limited research in this area) has demonstrated mixed educational outcomes (positive, neutral, negative).
- Community building mechanisms smooth the transition process by bridging perceived sociocultural distinctions.
- Key factors to successful regionalization include: empower stakeholders in shared decision-making, high levels of communication, transparency in governance and decision-making, creative solutions that mitigate against/repurpose closed schools, ensuring a well-organized transition process if consolidation is chosen.

Link to [Hanover #1 Updated report](#)

Figure 2.1: Pros and Cons of District Reorganization/Consolidation	
PROS	CONS
<ul style="list-style-type: none"> ▪ Reduced school costs; ▪ Reduced taxes for some residents; ▪ Additional state aid; ▪ More efficient use of resources and increased buying power; ▪ Greater academic and programmatic opportunities; ▪ Better instructional materials and equipment; ▪ Expanded extracurricular and sporting programs; ▪ Greater cultural diversity. 	<ul style="list-style-type: none"> ▪ Less individualized attention on students and losing benefits of small school environment; ▪ Culture disruption and loss of community identity ▪ Change in teacher and staff pay scale; ▪ Cumbersome process; ▪ Longer bus rides for some students; ▪ Increased taxes for some residents; ▪ One-time costs: signage, uniform, new websites, and other transition costs.

11. A community survey (1,270 participants) and supporting focus groups and interviews suggest that many in the community want to learn more, and have both common and divergent views.

- Stakeholders in both districts report a close-knit community, manageable class sizes, a desire to keep elementary schools open, reasonable travel times, and job retention as important.
- All groups supported expansion of Career Vocational Technical Education, as well as benefits related to more opportunities for students related to courses, activities and clubs.
- Many perceive fiscal impact (both negative and positive) associated with maintaining current districts and/or consolidating in some form.
- Stakeholders reported the Monument high school project as having potential for significant influence on potential solutions.

Link to [Survey Results report](#)

STUDENT/ALUMNI'S top benefits and concerns (they were asked to choose 3)			
Top 3 benefits (green) and concerns (peach)	Full regionalization (n=99)	Combined HS (n=108)	Collaboration (n=94)
More funding available for new school construction or renovation	32%	33%	Not a choice
More extensive course selection	24%	33%	Not a choice
Possibility for collaborative course offerings	Not a choice	Not a choice	33%
Larger and more diverse student body	26%	31%	Not a choice
More options for clubs, activities, sports	23%	31%	Not a choice
Expanded CVTE	24%	23%	27%
Schools and districts maintain identity	Not a choice	Not a choice	37%
Average class size (# in a course together)	31%	36%	Not a choice
School size (total number of students)	26%	25%	Not a choice
Longer travel to school	25%	33%	Not a choice
Towns/taxpayers bearing the costs of separate districts	Not a choice	Not a choice	36%
Collaboration often informal, voluntary, inconsistent	Not a choice	Not a choice	31%
Getting the collaboration up and running	Not a choice	Not a choice	30%

This *top eleven* list likely skims the surface of data collected and is an incomplete representation. However, it is a starting point and foundation upon which these varying considerations converge and can be considered against the three models. We continue to encourage readers to link the various reports where additional data and analysis is desired.

Regionalization, described.

As stated, Models A (Full Regionalization K-12) and B (Merger of the high schools into a region and continuation of the elementary schools as one or two regions) both require the formation, modification, and/or dissolving of a school region. This section is intended to provide context and background related to regions and regionalization.

How districts form.

From the DESE, “A public school district consists of one or more public schools operated under the supervision of an elected or appointed school committee and a superintendent.” Districts manifest in several ways:

- **Municipal:** The majority of school districts across the Commonwealth are formed by a single city or town, and are considered a department of the municipal government. In 2020, there were 62 municipal elementary and 172 full municipal districts. Of towns, 49 participated in partial municipal districts and 172 in full K-12 municipal districts.
- **Regional:** Two or more municipalities can also join together to form a regional school district, which is considered a separate and independent unit of local government. A regional school district can offer all grades (preK-12), just certain grades (for example, just elementary grades or just high school), or just certain types of instruction (for example, vocational and technical programs). In 2020, there were 21 partial regional districts and 37 K-12 regional districts. There were also 29 vocational districts (which operate as regions). Of towns, 9 belonged to partial regions and 104 belong to full K-12 regions (of which both BHRSD and SBRSD classify).
- **Charter Schools:** Established by the 1993 Education Reform Act as found in chapter 71 of the Massachusetts General Laws, section 89, these are public schools that operate under five-year charters granted by the Board of Education. Each charter school is an independent charter school governed by a board of trustees.
- **Supervisory Unions:** MGL allows the school committees of two or more towns to join together to form a union school committee. The organization of the union school committee is governed by statute, as are its powers, which are limited to the authority to employ a superintendent of schools, school physicians, school nurses, clerical and secretarial personnel, special teachers, and supervisors. All other powers and responsibilities are retained by the local school committees of the member towns. There are [15 superintendency unions](#) in Massachusetts, comprising 48 member towns. Currently 32 of the municipal districts participating in superintendency unions also are members of regional school districts that hire the same superintendent and central office staff. In 2020, 15 superintendents and 62 school committees served 48 municipalities and 14 regional school districts in 84 schools serving 30,164 students.

Communities that do not operate any schools are classified as non-operating school districts (non-op) in this directory. If the town is not a member of a regional school district at each grade level, it must enter into an agreement with another school district to educate the students at those grade levels at the town's expense, via tuition. A list of tuition agreements can be found [here](#), with 17 towns that tuition out (these include a number in Berkshire County including Richmond, Mt. Washington, Otis and Sandisfield).

A list of Berkshire County school/district organizations can be found [here](#).

The Question of Size.

As districts form, considerations for how to configure often include questions of resource allocation, cost, ability to provide educational programming, and size. This last element, size, is often linked to the first three - what is the optimal size that achieves scale, efficiencies, equitable access, and excellence in programming?

It's important to begin by recognizing that neither SBRSD or BHRSD, as they currently operate or as a combined district, would be considered large. In fact, a Massachusetts [rural study](#) (2009) defined small as less than 2,000 students. Thus, the literature on small versus large can be considered, but may not be completely applicable to even a combined 8 Town model. Drawing from a Hanover brief, [The Impact of School District Size](#), there are several key findings:

- Research suggests potential benefits of larger school districts for student achievement.
- Multiple studies suggest that a district size of 6,000 to 6,500 students maximizes cost-effectiveness, with diseconomies of scale increasing costs for larger districts.
- Districts, however, may not realize substantial cost savings after redrawing district borders due to transaction costs.
- Redrawing district borders create challenges in ensuring equity and diversity.
- Districts can make opportunities for local stakeholder involvement by transferring additional responsibilities and decision-making to the school level.
- Large education systems can leverage their size to improve student achievement.
- Smaller school districts may face more limited organizational capacity compared to larger districts.
- In general, research finds that operating costs per student are lower in smaller districts, while student achievement is higher in larger districts.

As suggested in the BCETF Phase I study, "A common argument in favor of consolidating small, rural districts is that small districts have high per-student costs due to duplication of administrative, operational, infrastructure, and personnel costs. This question has been studied extensively, but the literature does not provide a clear answer with regard to optimal school district size in terms of cost savings and academic achievement."

A number of studies (Duncombe and Yinger, 2007 & 2010; Cronin et al., 2009; Cooley & Floyd, 2013; Coulson, 2007; and Rooney and Augenblick, 2009) signal that long-term savings are possible but often require financial incentives, savings were possible but often smaller than projected, and savings models were often oversimplified and needed to be approached on a case-by-case basis.

While small size literature and rural school literature are distinct, they overlap in that they both often address the issues of size. Massachusetts has, currently, an active advocacy effort related to rural schools issues. A 2018 report, [Fiscal Conditions of Rural Districts](#), in Massachusetts found that:

- Rural enrollment is declining
- Rural districts employ more teachers and paraprofessionals per 100 students

- Total spending and per student spending is growing more quickly in rural districts
- Rural districts spend more on transportation
- Rural districts gain some benefits through state aid such as hold harmless and wage adjustment
- Rural districts are relying more heavily on school choice as a revenue source

The report makes a series of recommendations that have been and/or are currently being considered and are cited in the [2017 State Auditor Report](#), in the [Special Commission Report](#), and in recent Rural Schools Commission efforts. Suggestions for supporting rural schools include:

- Increasing minimum state aid and/or adding sparsity aid
- Ensuring (reliable) regional transportation aid, 100%
- Reformulating regional bonus aid
- Providing more incentives and reduce structural issues towards regionalization, adjust issues that discourage
- Expanding planning grants, including providing resources to support regional planning studies, including additional funds and technical assistance
- Exploring criteria within MSBA that discourages closure of schools in seeking to recapture grant monies, increase capital support for regionalization initiatives
- Centralizing information and resources for regionalization and provide resources to DESE to support regionalization efforts
- Considering legislation that addresses existing barriers to and increases incentives for regionalization
- Supporting resources for the regional transition process
- Considering alternative taxation methodologies, such as a single tax rate across a RSD

There are also less visible - but critically important - effects of smaller, rural schools. A study out of the Harvard Graduate School of Education (Re & Friesenhahn) found that rural students:

- Are graduating at the same rates as their suburban counterparts, but going to college at lower rates
- Once they get to college, are more likely to drop out
- Score high or higher on verbal assessments, but lower on math
- Have access to fewer AP courses, including fewer STEM offerings

Finally, in the RSDPB commissioned study, [District Restructuring](#), the Hanover Group studied the success, challenges, and strategies related to district consolidation. Key findings relevant to the efficacy of moving from more smaller districts to fewer larger districts included:

- **School closures are frequently required to achieve true economies of scale.** Often pursued to limit the costs associated with running smaller schools, to better balance/maximize class size, and to ensure a full range of educational programs and services.
- **Reorganization has resulted in mixed educational outcomes.** Studies suggest some gains in adopting a unified curriculum, expanding academic and enrichment opportunities when going from smaller to larger. In contrast, some reorganization has resulted in continued achievement gaps among at-risk and low income students.
- **Research is limited and mixed on the effectiveness of reorganization on cutting costs.** While studies signal operational costs decrease, cost savings may be diminished by capital spending.

A summary table from the Hanover report, shared below, shows that there are several sources of both economies of scale and diseconomies of scale to consider

Figure 2.4: Factors that Influence the Impacts of District Consolidation

POTENTIAL SOURCES OF ECONOMIES OF SCALE	POTENTIAL SOURCES OF DISECONOMIES OF SCALE
<p><i>Indivisibilities</i></p> <ul style="list-style-type: none"> One central administration (e.g., superintendent, school board) or school teacher can serve a broader number of students without a significant drop in the quality of education. 	<p><i>Higher transportation costs:</i></p> <ul style="list-style-type: none"> Larger districts must account for average transportation distance to increase, as well as student travel time.
<p><i>Increased Dimensions</i></p> <ul style="list-style-type: none"> Larger schools can achieve a lower average cost of heating, communications, and specialized facilities (e.g., science or computer lab). 	<p><i>Labor Relations Effects</i></p> <ul style="list-style-type: none"> A more active teachers' union in a larger district may prevent staff layoffs, thereby eliminating a major source of cost savings from consolidation.
<p><i>Specialization</i></p> <ul style="list-style-type: none"> Larger schools may be able to employ more specialized teachers (e.g., computer science or math teachers), providing a compelling justification for consolidation in an era of rising standards. 	<p><i>Lower Staff Motivation and Effort</i></p> <ul style="list-style-type: none"> Administrators and teachers may have a more positive attitude towards work in smaller schools, which tend to offer more flexibility and opportunities for input from all school personnel.
<p><i>Price Benefits of Scale</i></p> <ul style="list-style-type: none"> Large districts may be able to take advantage of the price benefits of scale by negotiating bulk purchases of supplies and equipment or imposing lower wages on employees. 	<p><i>Lower Student Motivation and Effort</i></p> <ul style="list-style-type: none"> Employees in smaller schools are more likely to know students by name and to identify and assist at-risk students. Students in smaller schools may also have a greater sense of belonging, more positive attitude toward school, and a higher motivation to learn and participate in extracurricular activities.
<p><i>Learning and Innovation</i></p> <ul style="list-style-type: none"> If the cost of implementing innovations in curriculum or management declines with experience, a larger district may be able to implement such innovations at lower cost. In addition, teachers may be more productive in a large school because they can draw on the experience of many colleagues. 	<p><i>Lower Parental Involvement</i></p> <ul style="list-style-type: none"> Parent engagement and participation in school activities contribute to educational production. The role of parents is linked to economies of scale whenever parents find participation less rewarding or personal contacts more difficult in larger districts.

Why regions form.

The formation of regional districts is governed by [Massachusetts General Law, chapter 71, section 14-161](#) (all regional districts) and [MGL, chapter 74](#) (for vocational regions). Additionally, the Department of Elementary and Secondary Education provides a number of regulations pertaining to regional districts in [603 CMR 41.00](#).

As provided in the [historical review](#), the first K-12 regional district was, in fact, formed in 1953 by five towns (Alford, Egremont, Monterey, New Marlborough, and Sheffield) becoming the Southern Berkshire Region Regional School District. While the three towns of Great Barrington, Stockbridge and West Stockbridge were involved in the SBRSD planning process, they voted against joining. It was not until later, in 1965, that these three towns combined and formed the Berkshire Hills Regional School District.

In both cases, finance, greater levels of college preparatory courses, vocational programs, and commercial courses were offered as impetus for the mergers. A quote from Stockbridge Superintendent James Quinn in 1951 sums it up, “What are the needs of our children 4 RSDPB Research Team, *Historical Review, October 2021 educationally? What kind of education do we, as parents, want to have available*

for them, and does our present school system supply those needs or is there assurance that the regional school can better supply them.”

It’s important to underscore that regionalization does not necessarily mean that school buildings have to close, although often savings are generated through closures and mergers. More importantly, regionalization is really two, or more, towns’ decision to educate their students together.

The Advantages of Regionalizing.

The benefits associated with regionalizing have been captured in the many planning processes, research papers, and summaries of regionalization processes. A curated list captured through these various experiences and studies is outlined below.

- A single school committee with cohesive educational policy for all K-12 students
- A single administration with potential for more efficient and economical operation of school departments
- A coordinated curriculum, kindergarten through grade twelve
- Expanded curricular offerings due to fiscal efficiencies to serve an increased number of students from combined enrollments, envisioned educational improvements in a regionalized situation
- Fuller utilization of teachers and other staff and school facilities
- Opportunity to offer more enrichment within school curriculum
- Opportunity to expand athletic programs and extracurricular activities
- Coordinated program of testing, guidance, health services and support services
- A single salary schedule and set of bargaining agreements for staff in each bargaining unit
- A single budget, administered to take advantage of efficient, centralized purchasing techniques and coordinated transportation
- Expansion of critical mass to gain economies of scale and aggregated purchasing power of goods and services
- Opportunity for more administrative capacity at the district and school level
- Opportunity to redirect leadership time and energy to educational programs through a reduction of duplicative effort in business procedures, reporting and negotiations
- Expanded offerings could lead to fewer students leaving district under School Choice
- State regional transportation reimbursement
- Additional reimbursement points (potentially) granted by MSBA for regional school building projects
- Construction efficiencies as an enticement to districts experiencing declining enrollments
- A larger student base often provides greater opportunity to broaden educational programming and a larger district may provide more economies of scale.
- Utilization of sound, long range planning and fuller utilization of teachers and school facilities for all the pupils affected;
- Greater cultural diversity

The 2011 Special Commission Report uses the term “district capacity,” a term we have adopted throughout this process and our work with BERK12. District capacity is defined as, *“the overall ability of a school district to achieve one primary goal –to provide all children with a broad array of high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and citizens in a democratic society.”* A highly functioning district, thus, includes the following advantages:

- Design and implementation of challenging, aligned, and coherent instructional programs and services (consistent with state and national standards) that are dedicated to the development of the whole child;
- Evaluation of program effectiveness through analysis, on a regular and ongoing basis, of student growth and achievement data using clearly identified and developmentally appropriate criteria;
- Recruitment, retention, and development of highly qualified staff members, and regular evaluation of their ability to promote high-quality student learning and social/emotional development;
- Effective communication and collaboration with parents, families, local and state officials, and other community members to promote student achievement and development;
- Support and promotion of positive, nurturing, and safe learning environments in all classrooms and schools; and
- Maximization of the allocation and expenditure of district funds, resources, and materials, and accurate monitoring of expenditures over time.

In addition, school districts must operate efficiently to achieve the above mentioned goals, thus a regionalization approach builds capacity to do so. While there are many advantages, a number that bring current RSDPB members to the table, there are also challenges and potential obstacles.

The Disadvantages of Regionalizing.

The disadvantages associated with regionalizing have been captured in the many planning processes, research papers, and summaries of regionalization processes. A curated list captured through these various experiences and studies is outlined below.

- Feared loss of focus on elementary education
- Fear that elementary students will be transported across town lines and with longer bus rides
- Differences in financial support of education in member towns; Objection of wealthy districts to joining with poorer districts for fear of having to pay an undue share of the costs of the new district; Poorer districts fearing increased taxes to meet higher standards
- Differences in educational goals and objectives
- Real or perceived social differences
- Unwillingness to share control with neighboring towns
- A fear of loss of local pride and control
- Loss of community voice through reduction of School Committee representation
- Potential change in administrative leadership and staff
- Loss of town control of state aid when funds are distributed directly to the regional district; Unwillingness to share budget control over educational spending
- Loss of direct budget control and control of school buildings
- Potential for closing town school buildings; the misconception that regionalization always entails the closing of school buildings
- Concern for job security and impact on teacher salaries, benefits and professional status
- Short term transition costs
- Lack of support and guidance for regional planning and transition
- General resistance to change
- Operational issues – e.g. reconciling collective bargaining agreements, consolidating central office functions, and resolving debt obligations for school facilities

- Disparities in per-pupil spending between districts
- Concern over capital and operational assessment methodologies and costs
- Real or perceived economic, educational and/or social differences between districts
- Belief that smaller is better with more individualized attention to students
- Belief that the town is doing its best for students and the joint district would be too far removed from understanding of town desires and interests
- Fear there will be more bureaucracy in a larger regional administration
- Fear there will be larger schools and larger class sizes
- Fear that regional districts cost more to operate
- Impact of state aid calculations - Belief that more state aid, or a change in the state aid formula or a reduction of state and/or federal mandates will resolve existing financial challenges and allow the existing towns to remain solvent
- Potential increased costs due to: Additional costs to coordinate technology, align curriculum and school schedules, negotiate and combine contracts and leases, etc.; Merging collective bargaining agreements; Legal costs to develop the regional agreement and negotiate contracts;
- Credibility of the state - lack of trust in continued state reimbursement for regional transportation
- Potential loss of state construction aid if closing a school building recently constructed or renovated with state funds
- Changes in operational assessment methodology under the education reform law requiring towns to pay according to their ability based on state formula and not on a per-pupil basis

Lesson Learned in Regionalization.

In addition to advantages and disadvantages, there are also lessons learned related to the regionalization process. In effect, things that communities should consider. In the RSDPB commissioned study, [District Restructuring](#), the Hanover Group offers several process considerations based on feedback from districts that had undertaken a regionalization process. These include:

- Further empower parents, other community members, and school staff for shared decision making.
- Continue using multiple lines of communication to engage residents, including community-building mechanisms to smooth the transition process by bridging perceived sociocultural distinctions.
- Ensure a well-organized transition process with robust community-building if consolidation is chosen.
- Maximize transparency in governance and decision-making.
- Explore creative solutions to mitigate against school closures, recognizing that school closures are frequently required to achieve true economies of scale.
- Mergers between “similar” districts have more support.
- Districts with similar enrollment, demographics, and “culture” often are more comfortable joining together.
- Broad based support, including school committee support, is key.
- Mergers can’t be forced on districts by other town boards or groups.
- Sometimes very specific and binding promises are required.

Collaboration

Option C (Collaboration) involves consideration related to collaboration, collaboratives, and shared services. This section is intended to provide context and background related to this topic. Given the unique aspects of collaboration, and the need for supporting documentation and narrative, the team compiled a separate, unpublished Collaboration (Shared Services) brief that is drawn from. This section is designed to offer a condensed version of this report.

Context, Definitions.

Collaboration between districts is and will always be an important element of how public education functions. Often these arrangements provide creative ways to save money in response to limited resources (personnel and financial) while allowing for ongoing local autonomy and avoiding mergers. All forms of collaboration, however, are not equal and provide varying solutions and arrangements that can be described as more or less impactful, and easier or harder to do. In the report, [District Shared Services](#) (2018), Hanover Research offers an excellent overview of Shared Services that we will (and can) draw from. Included are the benefits and challenges associated with shared services - examples and strategies for planning and implementation are provided. In defining Shared Services, the Hanover brief offers:

- **Shared services are arrangements where two or more school districts collaborate to share goods or services, offering districts multiple benefits including cost savings and improved service quality.** This allows districts to reduce costs, resulting in economies of scale, while avoiding mergers and consolidations that lead (potentially) to a loss of local autonomy.
- **Districts can share a wide range of service types, including those that directly impact students and those that support staff and district operations.** Services often include administrative, purchasing, financial services, facilities, transportation, instructional services, maintenance, and insurance - for example. Additionally, districts often share highly specialized roles such as speech and language pathologists, special education, and specialized equipment.

For consistency in this brief, we will use the term **Shared Services** to reflect all forms of Collaboration between districts.

Shared Services, Why?

Shared services offer a range of benefits with relatively few drawbacks resulting in a balance between centralized and decentralized controls. Districts are able to maintain autonomy/independence while still achieving increases in programming, services and efficiencies. Hanover summarizes the benefits to include:

Save money: lower capital costs, diminished administrative and development costs, reduced redundancy, lower personnel costs, and revenue from sales of surplus assets
Gain economies of scale
Standardize processes
Attract more highly qualified staff
Retain local control and achieve scale
Reduce variation in the need for services from year to year
Less political opposition

While cost savings are often cited as the largest benefit, additional, less visible benefits include compliance with legal requirements, convenience, and the ability to offer a service/product that would, otherwise, be unavailable.

Shared Services, Types.

Types of Shared Services include:

- Direct Services: Services to students, such as instruction and transportation
- Indirect Services: Support to staff and operations, such as technology, payroll, purchasing and facilities

Shared Services, Commonly Shared Services.

A list of commonly shared services curated from several studies are summarized in the figure below:

<ul style="list-style-type: none"> ▪ Administrative office space; ▪ Athletic fields; ▪ Career and technical education programs; ▪ Facilities; ▪ Food services; ▪ Human resources; ▪ Instruction; ▪ Insurance, including liability, workers' compensation, and healthcare; 	<ul style="list-style-type: none"> ▪ Maintenance services (e.g., snow plowing, lawn maintenance, sidewalk and parking lot repair and maintenance, and vehicle maintenance); ▪ Maintenance staff; ▪ Payroll and financial services; ▪ Pupil transportation; ▪ Purchasing, including services for water, wastewater, natural gas, electricity, equipment, services, and supplies; ▪ Recreational facilities; 	<ul style="list-style-type: none"> ▪ School business administrators and other administrative staff; ▪ Services such as cable television, computer networking, and telecommunications; ▪ Special education programs; ▪ Staff professional development; ▪ Superintendents; ▪ Technology; ▪ Transportation; and ▪ Virtual and distance learning.
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Shared Services, Worth doing - A good fit?

The Hanover analysis includes consideration of potential fit (do they tend to work?) and potential savings (are they worth doing?). In the direct services, Transportation is both a *good fit* and a *high savings* potential while health services are a *modest fit* and likely *don't* yield significant savings. For direct services, purchasing and facilities are both a *good fit* and have *high savings* potential, while administration is *modest* for both fit and savings. A summary table is below:

CAPABILITY	FIT FOR SHARED SERVICES	SAVINGS POTENTIAL
DIRECT (SERVICES TO STUDENTS)		
Transportation	High	High
Food service and Nutrition	Medium	Medium
Instructional	Medium	Medium
Safety and Security	Medium	Medium

Health Services	Medium	Low
INDIRECT (SERVICES TO STAFF OR INFRASTRUCTURE)		
Purchasing	High	High
Finance and Payroll	High	Medium
Facilities and Real Estate	High	High
Human Resources	High	Medium
Technology Services	Medium	High
Administration	Medium	Medium

We believe that **Shared Services**, for the purpose of this RSDPB study, is best grouped into two broad categories:

- A. **Shared service arrangements.** Both ad hoc and formal agreements between districts that result in shared resources (staff, materials, equipment, facilities, academic property). Designed to solve immediate problems that may exist between districts on a temporary or recurring basis.
- B. **Educational Service Agencies (ESA), also known as Collaboratives** in Massachusetts. These act as third educational parties that allow access to resources such as staff, programming, transportation, services, and purchasing.

Hanover draws from the literature in expanding these definitions to include six models, which can be described in terms of both advantages and disadvantages. Generally, the *more centralized* the service, the less duplication and the higher potential for impact, while *decentralized* models are less threatening but result in lower efficiencies and lesser impact. Examples provided in the literature include:

- **Specific Function Cooperatives:** Multiple districts receive a specific service from a single entity
- **Regional Educational Service Agencies:** Collaboration between multiple districts, allowing them to access services
- **Educational Service Districts:** Special-purpose school districts with member districts within a specific geographic area
- **Cooperative Educational Services Entities:** Supervisory districts run by a board that allows two or more districts to share programs or services
- **Cluster Districts:** Districts share services with neighboring districts
- **Shared Superintendents:** Two or more school boards retain a single superintendent

Another way to think about this is how districts interact with each other (2 or more) *or* with a third party (in Massachusetts, Educational Collaboratives, described further below). Interactions, with benefits and drawbacks, are below.

1. Geographically devolved service delivery – each district delivers its own service

Advantages	Disadvantages
<ul style="list-style-type: none"> ▪ Service delivery management remains close to schools. ▪ Districts retain operational control over service delivery. ▪ Standardization is somewhat possible with strong leadership. ▪ Limited disruption to status quo. 	<ul style="list-style-type: none"> ▪ Limited opportunities to leverage economies of scale and efficiencies. ▪ High degree of duplication of tasks and staff. ▪ Highest overall sector costs.

Decentralized (No Sharing)



2. Select districts working together to deliver a common service for the other.

Advantages	Disadvantages
<ul style="list-style-type: none"> ▪ Some efficiencies are realized between districts through standardization. ▪ Select improvements on service delivery quality. ▪ Service delivery management remains close to districts. ▪ Builds upon existing exploration and actions of districts. 	<ul style="list-style-type: none"> ▪ High degree of duplication remains across districts. ▪ High-cost service delivery.

District-to-District



3. Partially geographically centralized service delivery (regional level).

Advantages	Disadvantages
<ul style="list-style-type: none"> ▪ Enables some benefit from economies of scale. ▪ Increases process efficiency and standardization. ▪ Districts have partial control over service delivery. ▪ Can leverage existing geographical efficiencies and Communities of Practice. 	<ul style="list-style-type: none"> ▪ Some duplication between multiple service delivery and reporting structures. ▪ Encumbered decision making in individual districts. ▪ Requires a formalized management model.

Regional Co-located



4. Delivery of services provided by an external provider

Advantages	Disadvantages
<ul style="list-style-type: none"> ▪ Potentially shorter implementation timeframe. ▪ Leverage external parties' existing infrastructure and capabilities. ▪ Access to more cost-effective services. ▪ Maximizes standardization. 	<ul style="list-style-type: none"> ▪ Potential reputational and people impacts. ▪ Security and data concerns. ▪ Limits direct interaction. ▪ Need to develop common criteria for goods or services. • Requires a new Shared Services Organization (SSO) be developed.

External Provided



Additional considerations (outlined in the Hanover brief) include a centralized model and a center-led model. We recognize that not all these variations are feasible or advisable, yet are sharing these to recognize the range of possible organizational models that exist. Below, we present analyses of two specific collaboration arrangements,

- A. Shared Services, and**
- B. Collaboratives**

described with specific attention to what is and has happened.

A. Shared Service Arrangements.

A review of Berkshire County has resulted in a determination that some of the collaborative activities that have and are occurring could be described as *Ad Hoc* (on demand solutions that may *not* include a formal agreement), while others are more Formal (specific agreements and/or contracts). Below, a listing of what we know about historical efforts in the region, and specific activities in SBRSD and BHRSD are provided.

The Collaboration brief outlines a series of collaborative efforts, current and historical, within south county and across the Berkshires. We refer readers to this brief which includes the following:

- Historical Efforts, Berkshire County
- **Current Efforts, BHRSD and SBRSD**
- **Previous Efforts, BHRSD and SBRSD**
- **Shared Services Project, SBRSD**
- **Southern Berkshire Education Future (SBEF), 2018**
- Superintendents' Roundtable, Shared Services Research
- Berkshire County Education Task Force, Shared Services Efforts and Priorities

We will briefly describe those efforts specific to BHRSD and SBRSD.

Current Efforts, BHRSD and SBRSD.

Building upon this foundational list, below is a summary of existing collaborative efforts as they are in place today. This list was formed through requests and verification of the business offices.

PURCHASING

1. Berkshire region Food Service bids
 - a. Region-wide milk, ice cream and paper bid.
 - b. Additionally, locally purchasing as possible (BHRSD)
2. OT/PT services – Lower Pioneer Valley Educational Collaborative (LPVEC) hired former South Berkshire Educational Collaborative (SBEC) employees, allowing districts to share these services.
3. GASB 45
 - a. Many municipalities and school districts have collaboratively engaged the services of an actuarial firm to calculate the OPEB unfunded liabilities, per the federal GASB guidelines. This collaboration saved time and money. (BHRSD lead on the project.)

4. Health Insurance
 - a. The Berkshire Health Group (BHG) is a self-insured insurance association of Berkshire region schools and towns. By participating in this group, BHRSD, Lenox (town and school), and SBRSD get the benefits of reduced insurance rates and claims management.
 - b. MIIA – Farmington River, Lee, Richmond

SPECIAL EDUCATION SERVICES

1. School Year
 - a. Tuition enrollment between districts enables students to access appropriate educational programs and services, without each district needing to establish their own similar program, thereby eliminating the need to duplicate existing programs.
2. Summer
 - a. Each district can enroll age-appropriate students in a shared summer special education program held on the Berkshire Hills RSD campus.

VIRTUAL HIGH SCHOOL (VHS)

1. Currently overseen by BHRSD for 5-district participation. (BHRSD serves as lead on the project.)

COOPERATIVE SPORTS PROGRAMS (within the MIAA parameters)

1. Crew
2. Hockey
3. Lacrosse
4. Lee/Lenox football
5. Swimming

PROFESSIONAL DEVELOPMENT

1. Examples of shared professional development are:
 - a. Cross-district literacy and math professional development.
 - b. Creation of common professional development days throughout the school year, in order for educators from districts to participate in programs across the six districts.
 - c. Sheltered English Immersion (SEI) training.

ADDITIONAL COLLABORATION OPPORTUNITIES

1. Sharing of bid document templates, to maximize efficiencies and reduce redundancies.
2. Membership in state-wide listservs for Superintendents and Business Administrators, providing access to a wide range of best practices.

Previous Collaborative Efforts (not currently in effect), between BRHSD and SBRSD

1. Transportation
 - a. Vocational Transportation
 - i. Lee, Lenox, and Richmond sharing transportation to Taconic and Pittsfield
 - b. Special Education Transportation
 - i. Districts share the cost of out-of-district transportation when they have students placed within the same, or nearby, programs out-of-district.
 - c. Field Trip Transportation

- i. Districts share the cost of field trips, when field trips include two or more districts and buses are shared.
- 2. Professional Development
- 3. Lower Pioneer Valley Educational Collaborative (LPVEC)
 - a. Electricity and gas bid – purchased
- 4. 403(b) Retirement Plan Bid
- 5. Other Insurances
 - a. MIIA
 - i. The Massachusetts Municipal Association formed the (MIIA) to service the insurance needs of municipal entities. Through this program, the towns/districts save on all non-health insurance, including automobile, general liability, property and casualty, employee liability and umbrella insurance coverages.
 - ii. Most municipalities/districts also receive a dividend payback, which reduces costs even further due to length of participation.
- 6. Massachusetts Higher Education Collaborative (MHEC)
 - a. New England purchasing consortium.

While we had intended to estimate cost savings associated with these collaborative efforts, the savings widely vary given a number of these collaborative arrangements are fluid, meaning they come-and-go. The business offices suggested that calculating such savings would be difficult to reflect precisely.

Shared Services Project, SBRSD.

A shared services project was launched in 2014, under the leadership of 4th Berkshire District Representative Pignatelli. The [Southern Berkshire Shared Services Project](#) (SBSSP) intended to consider ways in which south county districts could share services across six districts that span 500-square miles. The project was supported by a state Community Compact grant and local bank support.

A [final report](#) included a summary of effort that documented monthly meetings that included six districts: Berkshire Hills, Lee, Lenox, Farmington River, Richmond and Southern Berkshire. The group also worked collaboratively with the Superintendents' Roundtable, the Berkshire Compact for Education, the Berkshire County Education Task Force, and South County Regionalization and Consolidation working group.

Overall, the report “demonstrated and continues to demonstrate that school districts can collaborate and share services to provide higher quality and better educational opportunities while reducing costs and realizing efficiencies.” There were four areas identified as both areas of success and promise:

- 1. Professional Development. County-wide professional development includes 65+ networks, professional learning networks/communities.
- 2. Technology. Advanced analysis of Technology in concert with JSX Services in both auditing and developing an implementation plan - with estimated savings of \$174,000. This resulted in

regular meetings of south county technology directors and a review of student information, learning management, and software.

3. Grant Writing. A consultant supported a list of prospects and proposals.
4. Special Education. Special Education Directors developed professional development, new programs to address autistic students, and more regular sharing across districts based on student need.

The report goes on to offer that “The SBSSP has had an impact bigger than its work on shared services.” Examples included a shared Superintendent between Berkshire Hills and Shaker Mountain Union, a shared psychologist position, both the Lenox and BHRSD Superintendents interviewing for the open Lee superintendency - - for example. It also cites the work of the South County Group on Regionalization and Consolidation as promising.

Next steps included implementation of the technology plan, submission of grants, advancement of special education collaboration, and exploration of expanded and new possibilities. In the short term, a budget of \$70-95,000 was identified for investments in Professional Development, Grant Writing, Curriculum Coordination, Data Support, and Technology. It is our understanding that these funds were not raised and/or ever invested in these four areas, although ongoing collaboration in the areas of professional development and special education continues through various mechanisms.

Of note: The RSDPB Research Team consulted with JSX Services, who revised and updated the IT plan as part of our current work. While the plan was not implemented in any significant manner, it continues to stand as having good potential as a collaborative solution.

Southern Berkshire Education Future (SBEF), 2018

Our team report, [*Historical Review of Educational Regionalization and Collaboration Efforts*](#), outlines the formation and work of the SBEF. The group identified goals, challenges, and opportunities, outlined in an [*Opportunity Inventory*](#), and described possible options for collaboration and shared services including (but not limited to):

- Aligned IT systems (purchasing, student management, data, storage/records)
- General IT/computer technology management (hardware, software, staffing, tech support, training)
- Aligned purchasing (some occurring - increase in areas such as busing)
- Shared professional development (limited capacity by grade/license/content area)
- Shared curriculum development (texts, programs, instructional systems)
- Shared assessment systems
- Joint specialized programs (special education, emotional disability, vocational, etc.)
- Access to shared course work for students 6-12 in areas where enrollment is low, such as special elective, gifted education, AP/dual enrollment
- Blended/online courses – developing a shared learning management system
- Dual enrollment courses in concert with MCLA/BCC/Westfield
- Organization of education-to-career pathways, connecting activities (connection to local employers). Career Awareness, Exploration, and Immersion activities
- Exploration of emerging pedagogies, such as competency based, design thinking/problem-based, thematic and interdisciplinary approaches, badges and certifications
- Compliance training (state requirements, right-to-know, evaluation, SEI, etc.)

- Shared staffing (teachers and support)
- Expanded early childhood programming (early-K, pre-K, K)
- Grant writing and entrepreneurship
- Program evaluation
- Adult education and consumer programming
- Access to co-curricular programming (clubs and activities) cross districts such as robotics, theater, band, social justice, etc.

A number of the opportunities listed above were examples of limited collaborations that were already taking place. Many of the items were identified as profitable collaborations for all of the districts and were the topics of many conversations. The SBEF did organize a joint presentation, by Bill Daggett, who shared a progressive perspective on educational delivery. The more ambitious and educationally significant items identified, such as aligned IT and computer management systems, shared curriculum development, shared assessment systems, and shared grant writing were not developed. There was some momentum on discussion of an aligned school calendar and daily schedule, with the aim of shared services, staff, professional development and courses - but this did not advance beyond planning stages. The most significant momentum was made towards the commitment of a shared assistive technology coordinator, with each district committing resources towards a shared position. However, the effort failed to materialize and the SBEF eventually stopped meeting.

B. Collaboratives

Context.

As described earlier, educational collaboratives are educational service agencies (ESAs) that provide programs and services, in a cost effective manner, to complement the educational programs of member schools. While there are many forms of ESAs across the United States (Special District, Regionalized, & Cooperative), Massachusetts in 1974 passed Chapter 71 14B that made collaboratives in the Commonwealth possible, and set the regulatory and organizational parameters for these organizations.

In a [white paper](#) commissioned for the Massachusetts Organization of Educational Collaboratives (MOEC), a regional system of collaboratives is proposed to:

1. increase district central office capacity to support instruction
2. increase academic opportunities and program choice for students and parents
3. lower operating and administrative costs through economies-of-scale

The savings are significant enough that researchers have suggested that if 10% of Chapter 70 funds were leveraged through Collaboratives for cost-sharing activities, it would result in a 15% savings state-wide.

There are about 25 collaboratives in Massachusetts that provide a range of services and programs for member schools. While collaboratives were launched in the 1970s to address services to profoundly disabled special education students, today they offer a range of services such as:

- high quality professional development programs for teachers and administrators in the latest regular and special education pedagogy and practice
- cooperative purchasing of paper and office supplies; software and hardware technology; and fuel oil, electricity and natural gas

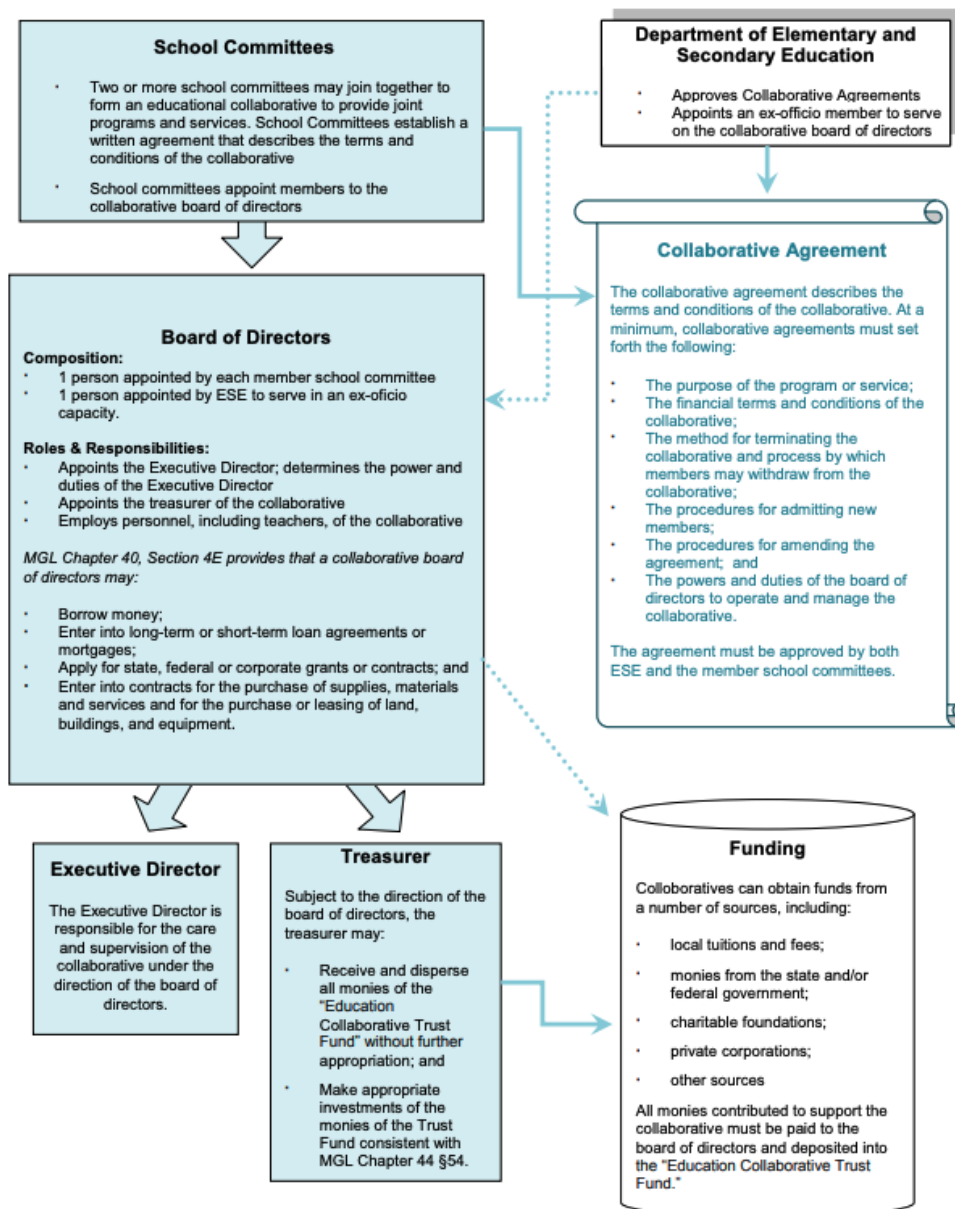
- the management of Medicaid billing services that yields the return of more than 21 million dollars to participating school districts and municipalities
- a statewide special education transportation network saving participating school districts several million dollars annually in special education transportation costs
- migrant education and virtual schooling
- cultural proficiency training

Collaboratives, Massachusetts, background.

A short description of how collaboratives are formed, governed, and managed is provided below as a basic reference. A more detailed description can be found in a [DESE publication \(2015\)](#).

1. Two or more school committees and/or charter school can initiate an educational collaborative by entering into a written collaborative agreement and going through the DESE process steps outlined below and here: <https://www.doe.mass.edu/edcollaboratives/governance-guidance/>
2. Once established, the collaborative is managed by a Board of Directors, composed of one representative annually appointed by each member school committee/charter school board of trustees. Representatives may be school committee members, charter trustees, or superintendents.
3. Representatives may not draw additional salary or stipend for their service on the Board of Directors.
4. The commissioner appoints an individual to serve as a DESE liaison.
5. Collaborative boards must meet at least 6 times annually.
6. Representatives must provide quarterly updates on collaborative activities to the member's appointing school committee or charter board at an open meeting.
7. The Board of Directors establishes and manages an education collaborative fund. All financial contributions from member municipalities, schools, state and federal grants, charitable gifts, or any other source are held in this fund.

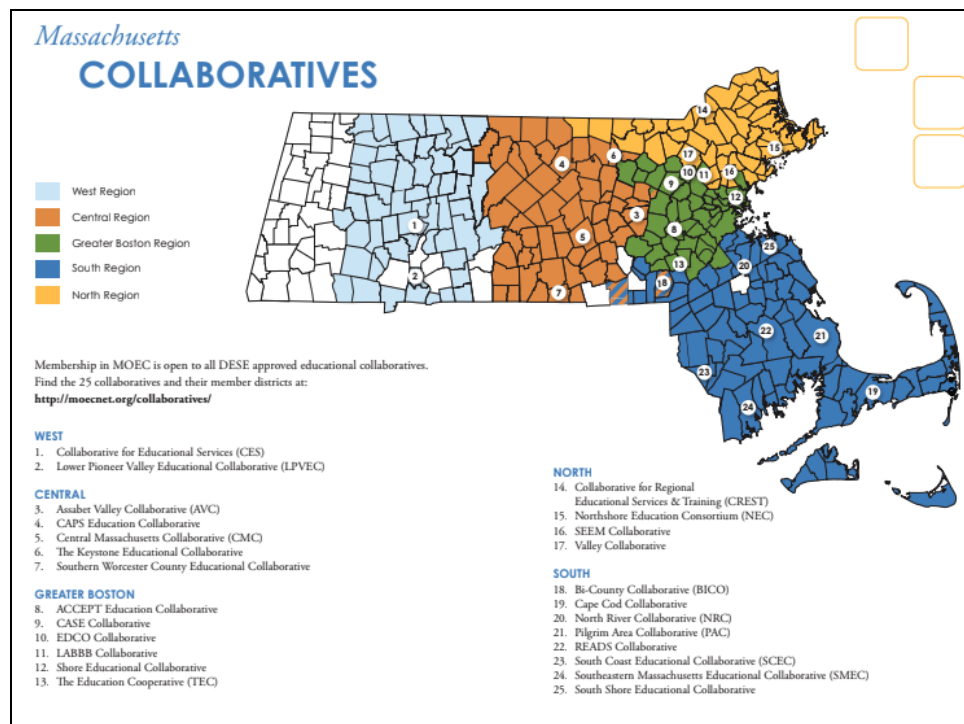
A schematic showing the structure of educational collaboratives is provided below, and drawn from the Report to the Legislature, [Special Commission on School District Collaboration and Regionalization \(2011\)](#).



Additional information including how collaboratives are formed and reporting requirements can be found in the Collaborative brief.

Services of Educational Collaboratives.

Massachusetts currently has 25 education collaboratives, distributed across five regions. Berkshire County is the only region in the state without an educational collaborative. A map of existing collaboratives is provided below, through the [Massachusetts Organization of Education Collaboratives](#) (MOEC), an organization that engages in advocacy concerning state policies, funding, and legislation, and plays a lead role on certain statewide initiatives (such SPED director regional meetings and the Leading Educational Access (LEAP) project).



Collaboratives offer a variety of services, some specializing in a narrow suite of services, others providing a broader range of services. These services follow much of the general shared services that have been referenced previously in this brief. Massachusetts educational collaborative services include:

- Student-facing
 - Services and programming for students with disabilities, transition services
 - Services and programming for at-risk students (including alternative high schools)
 - Vocational education programming
 - Early childhood services
- Educator and staff services
 - Professional development
 - Educator licensure
 - Mentoring and coaching
- Technology
 - Educational technology
 - Technology development
- Administration and operations
 - Student transportation services
 - Shared administrative, back-office functions
 - Technical assistance
 - Research and evaluation
 - Grant-writing
 - Cooperative purchasing and energy management
 - Data collection and analysis, assessment

Educational Collaboratives, Examples.

A full list of collaboratives and a searchable database of programs can be found [here](#) as provided by MOEC. Three examples, one featured by MOEC and the other two representing those closest to Berkshire County, are briefly described below:

- [SEEM Collaborative](#). This Therapeutic Learning Center was featured by MOEC in a state-wide presentation and their services include programs and services (elementary to high school) to students with moderate to severe disabilities including: adaptive physical education, clinical/mental health, music therapy, occupational/physical/speech/language therapy - for example.
- [Collaborative for Educational Services](#) (CES). Our closest collaborative, based in Northampton, provides services across the state with 35 member districts. Leveraging grant funding, they provide educational programming for the Department of Youth Services and to special education students in institutional settings. They offer a range of Professional Development services from SEI endorsement, curriculum and instruction, and technology (recently a cohort of Berkshire educators went through their ISTE technology training). They also support cooperative purchasing.
- [Lower Pioneer Valley Educational Collaborative](#) (LPEV). Also, relatively close to the Berkshires, they deliver educational programs such as career technical and special education, business services related to transportation, medicaid reimbursement and energy purchasing, and educator support in the areas of curriculum/instruction/assessment, DESE State System of Support, and Job-Alike groups. They charge tuition for access to programs with seven direct members (they also accept non-member students).

There is much to learn through further study of the 25 collaboratives across the Commonwealth in terms of organization, formation, funding, and programming. These three examples provide a starting point and any decision to consider the formation of a collaborative would be informed by further study and consultation from collaborative program leaders/founders.

Educational Collaboratives, History in the Berkshires.

A curated historical review of educational collaboratives in Berkshire County is provided in the [Historical Review of Educational Regionalization and Collaboration Efforts](#) document. We refer readers to that document for a more comprehensive overview, below are brief snapshots of collaborative efforts in the Berkshires.

- [Berkshire Collaborative for Low Incidence Educational Needs \(BCLIEN\)](#). Formed in 1974, BCLIEN was created to help Berkshire County school districts provide the educational services required by Massachusetts Chapter 766. BCLIEN existed until the early 1980s.
- [Southern Berkshire Educational Collaborative \(SBEC\)](#). Formed in 1975 to address the vocational needs of south Berkshire County. SBEC existed until 2012, although it went through many changes. SBEC included Berkshire Hills Regional School District, Lee Public Schools, Lenox Public Schools, and the Southern Berkshire Regional School District. Programs offered included building trades, health services, food service, auto maintenance, and various internships. At various points of its existence the SBEC also delivered Post-Grad LPN program, remedial 9-12

summer school, day care, Occupational/Physical therapy service coordination, and adult education.

In its most recent operational model, SBEC focused on four areas including: Adult education, OT/PT professional services, Transportation, and Virtual High School (VHS). In fiscal year 2006-2007, the SBEC budget was around \$475,000 (funded by grants and district assessments - in FY08, was \$24,282), and fee for service (personnel, transportation, and professional development).

The SBEC was studied in various reports including: [Feasibility Study Berkshire Area Collaborative](#) and [Towards an Informed Discussion on How Best to Organize School Districts in Berkshire County](#). It was likely around 2008 that the sustainability of SBEC came into question as the Feasibility study indicated the potential to “expand, reorganize, and rename SBEC” to include all 16 school districts/committees. This was likely due to sustainability concerns of a collaborative that serviced only the south county. Potential (suggested) services for a county-wide collaborative included:

- Transportation
- High Cost Special Education Programming
 - Adjustment programs, including Alternative Education
 - Career Preparation for students with mild to moderate academic delays
 - Programs for Multiple/Moderate Severely Disabled Students, including Vocational Preparation
 - Itinerant Professional Services
- Professional Development
- Magnet programs that result in student retention (charter, choice, private, parochial)
- Cooperative purchasing
- School security and funding
- Short term financing
- Grant writing
- After school, summer, and enrichment program expansion
- Common templates for federal initiatives, school safety, pandemics
- Shared Administrative services
- Distance Learning for low incidence academic needs
- Maintaining curriculum with declining enrollments
- Shared Professional Services (legal, auditing, technology, etc.)
- School Maintenance- smaller projects
- Data Warehousing and technical assistance
- E-rate submissions
- Medicaid reimbursements

This list (now 14 years old) continues to be relevant today, reflecting much of what is identified as possible shared services options in the literature, and could certainly serve as a foundation for shared services into the future.

Another report, [South Berkshire Educational Collaborative](#), was completed in 2008 by Consulting Partners. This report served as a specific look at the special education functions within the SBEC. The report was telling in that it identified potential *issues* associated with operating SBEC such as:

- The cost of running SBEC was expensive, with assessments on the increase despite limited service delivery.
- Equal assessments (regardless of district size) were noted as concerning.

- There was more discussion of collaboration *independent* of SBEC, than through it.
- There was a loss of focus on special education services, which was one of the main reasons for the creation of the collaborative.

The study included a series of 21 recommendations for reinvigorating the collaborative such as: equitable representation, regular meetings of key stakeholders, evaluation, standards for programs, and additional programming - for example. Both this report and the feasibility study may have signaled the beginning of the end for SBEC, given there are no records of connections, coordination, or response to the Public Management and the Consulting Partners, Inc. studies. The SBEC ceased to exist in 2012.

- Other Berkshire Collaborative Efforts. As documented in the shared services section, collaborative efforts have been ongoing in the Berkshires across districts, cycling in and out of existence, yet demonstrating an effort to work together and connect via networks (such as the Compact for Education). Recent and ongoing efforts to build smaller scale collaborative/shared services consortiums include:
 - The Berkshire County Superintendents Roundtable, through a modest budget, has delivered common professional development, student cultural programming, professional learning networks, and a county-wide professional development day.
 - Collaborative initiatives across a spectrum of current topics have been supported by non-profits (1Berkshire, Berkshire United Way, District Attorney, Mass Hire- Connecting Activities), the Massachusetts Association of School Committees, and through (now defunct) mechanisms like state-sponsored Readiness Centers.
 - The Northern Berkshire Academy is a current special education collaborative project hosted by NAPS in partnership with the four other north county districts, NBSU, ACRSD, CBRSD, and MGRHS. The program serves students grades 7 -10 who have documented emotional disabilities and are on individual education plans.
 - Berkshire Educational Resources K12 (BERK) - described earlier in this memo - formerly the Berkshire County Education Task Force, has organized a number of cross district collaborative projects including the Berkshire Remote Learning Initiative, Curriculum Mapping, Barr Foundation sponsored Portrait of a Graduate, and a number of study-action teams that are focused on examining realistic ways that districts can collaborate including: talent development, dual enrollment/shared courses, professional development, back-office functions, out-of-school time programming, and curriculum.

While the Berkshires does not host a collaborative, there is a general spirit of collaboration, although challenges remain as related to consistency, equitable access, and sustainable funding and leadership/coordination of these efforts.

Educational Collaboratives, Opportunities.

At this point in this brief, it is likely apparent that a well-managed, well-established education collaborative could bring significant potential benefits to member schools, including:

- Increased quality in services and programming
- Ensuring greater equity in delivery of services and programming, reducing service and educational gaps among better- and lesser-resourced schools
- Enabling schools to build capacity, e.g., in educational technology, data and assessment, Professional Development
- Avoiding service duplication

- Ability to expand services and programming beyond what individual schools provide
- More consistency and standardization in services, programming, professional development
- Increased cost-effectiveness
- Ability to respond nimbly to evolving local needs

Educational Collaboratives, Challenges.

Yet, while there is the potential for educational collaboratives to offer regional advantages, there are also significant challenges that are compounded by shrinking enrollment and stretched resources such as:

1. They are hard to establish.

- a. Process: Complex, multi-step process that must garner buy-in from multiple stake-holders.
- b. Support: Need full support of at least two school committees/charter school boards.
- c. Financial: Need to establish how prior and start-up costs are covered before the collaborative is up and running.
- d. Stake-holder perception: Collaborative may struggle with perception that it is acting contrary to local control, that the collaborative will cause school personnel to lose jobs, that services will be of lesser quality than what individual schools currently offer.
- e. Relationship with DESE: Need to get DESE approval through review process; might offer prescriptive oversight without comparable concrete support.

2. They are hard to sustain.

- a. Staffing: Need adequate qualified staff to offer services and programming, to fulfill DESE reporting and assessment requirements, and to provide management and administration.
- b. Financial: Collaboratives primarily rely on financial contributions from member schools, thus districts must feel that there is value in membership. Once established, collaboratives may seek 501(c)(3) status for grant and foundation funding.
- c. Support: Stake-holder perceptions may continue to be a challenge; collaborative will need to continue to have continuing buy-in from school committees/charter boards, educators, school leadership, and communities; will need to garner buy-in from new school committee/board members.
- d. Space: Need adequate, ADA compliant, flexible space to offer services and programming; Will collaborative schools be able to secure space in a member school? Will the collaborative have space outside of a member school? How might MSBA regulations impact space needs?

As part of this research process, we connected with the Executive Directors of both CES and LPEV, as well as MOEC. While both CES and LPEV continue to offer support for ongoing services such as purchasing and professional development, there appears to be low interest in expanding their membership catchment to include the Berkshires. Some of this is driven by capacity limitations, their service areas as defined by organizational missions, and regulatory constraints. For example, governance requires each member district to be assigned a seat on the collaborative board. If CES, as noted by the Executive Director, were to add Berkshire districts as members, their board would grow to an unwieldy size of 50 board members.

All Executive Directors of collaboratives we spoke with, including MOEC, offered their professional opinion that the Berkshires is likely too small to support a stand-alone collaborative, even when

including all county districts. Joanne Haley Sullivan, Executive Director of MOEC, suggested that about 15,000 students is a reasonable number to support a collaborative effort. The Berkshires is slightly under the 15,000 figure, with ongoing enrollment decline expected. She also noted that new collaboratives are not - in recent years - being formed, rather they are being absorbed/consolidated/combined. Where there were 30 collaboratives less than a decade ago, she expects that through consolidation there will be 24 within the next year. She said that the establishment of new collaboratives has all but stopped. She suggested that informal collaboratives/collaboration (as has/is happening and BERK12 is attempting to organize) may be the best way to build efficiencies, networks, and collaborative solutions.

This is reinforced by the MOEC white paper that recommended that ESAs (collaboratives) reorganize into regional clusters (West, Central, Northeast, Southeast, Metro). This would help to coordinate services, address specialization (rather than smaller collaboratives attempting to do it all), and ensure equitable access to cost-sharing services and best practices across the state.

Additional information in the Collaborative brief includes information on best practices in shared services, survey outcomes related to collaboratives, and additional feedback and considerations related to collaboration and shared services.

Models, Defined.

Under the direction of the Regional School District Planning Board (RSDPB) three primary reorganization models were studied, including:

- A. **Full K-12¹ Regionalization.** Full regionalization of BRHSD and SBRSD into a single K-12 regional district
- B. **Shared High School.** Formation of a high school combined regional district Grades 9-12, maintenance of independent elementary regional (K-8) districts/schools
- C. **Collaboration.** Increased and formal collaboration between districts, districts remain independent (could include a formal collaborative)

As stated in the work plan, the team remained open minded, flexible, and attentive to additional options and important considerations such as:

- School supervisory union and cost-center options that allow for common back-bone services, while maintaining independent schools/districts
- Career Vocational Technical Education
- The impact of choice and tuition (student flow) both between the two districts and from neighboring districts
- The utility/continued operation (or closure) of existing school facilities

It is important to emphasize that a thorough study of each of the three modes (A, B, C) requires additional definition given they are broadly described. As suggested in the Team's assertions, within each model there are multiple scenarios and numerous decision points (options) that are possible.

Our team used best judgment in selecting what we believe are the most likely and advantageous scenarios. There were instances in which we considered scenarios we felt were less advantageous and/or unlikely to happen if, for nothing else, than to eliminate these scenarios as viable solutions. For example, there are physical limitations to building (facility) capacity that makes the likelihood of consolidation of *all* students into that facility impossible (based on current enrollment). Similarly, there are travel times for students that are outside of acceptable limits. As mentioned, the parameters and scenarios we established are by no means fixed, and can be eliminated, added to, or adjusted based on feedback and desire to explore alternatives.

The scenarios are outlined, and briefly described below:

¹ Note, we use grades K-12 to reflect state required educational grades, but expect that Pre-Kindergarten, as it is offered now or expanded in the future, would be part of any independent or merged districts.

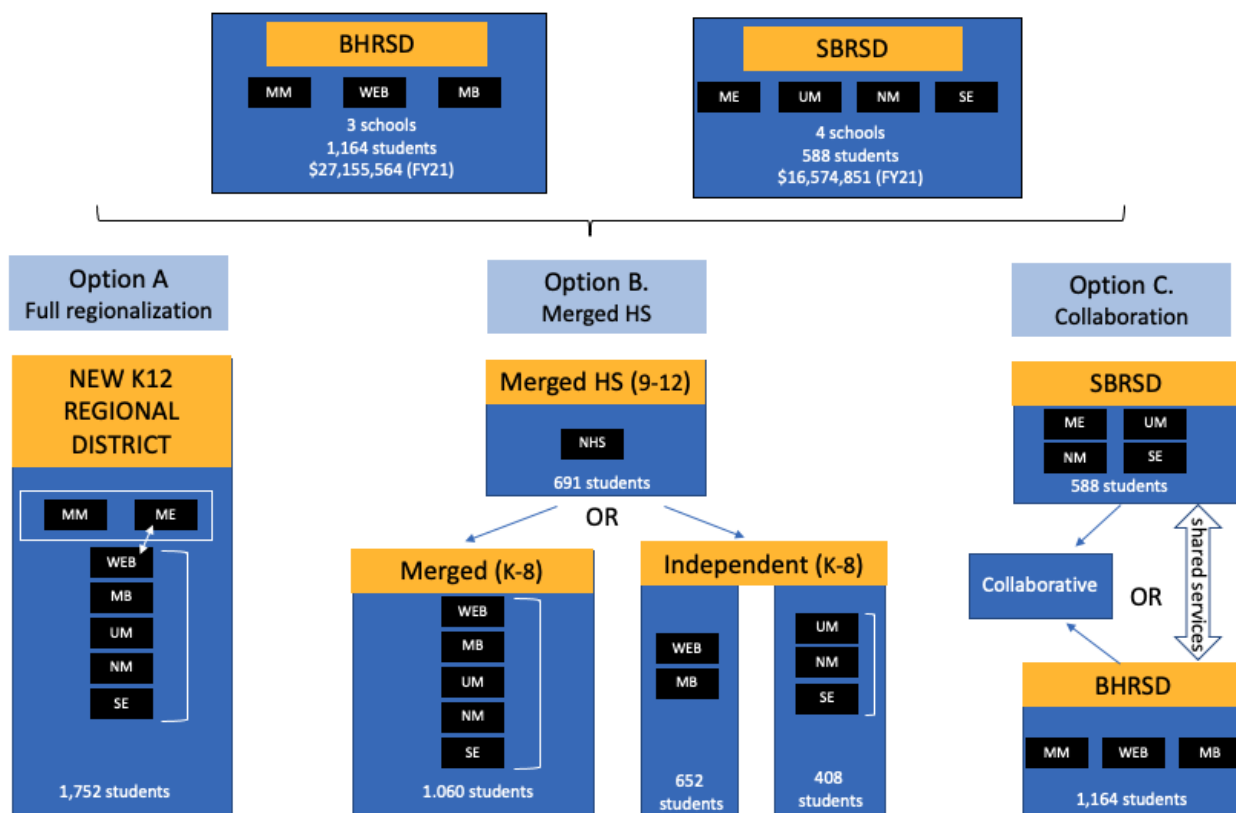
RSDPB Models, Described.

SCENARIOS	Model A. Full Regionalization		Single K-12 Regional District that includes all 8 Towns	
	1) All schools remain open and as currently structured		<ul style="list-style-type: none"> No changes to current buildings Students continue to attend their home schools Central office is consolidated as are selected operational functions such as facilities, IT, food service 	
	2) Grades 9-12 merge		<ul style="list-style-type: none"> Students at Mt. Everett (9-12) attend combined high school on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed Elementary schools remain as is 	
	3) Grades 9-12 merge & Grades 7-8 merge		<ul style="list-style-type: none"> Students at Mt. Everett (9-12) attend combined high school on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed. All grades 7-8 attend W.E.B. DuBois, merged staff and programs Mt. Everett grade 6 students attend Undermountain Mt. Everett is closed for repurposing Elementary schools remain as is 	
SCENARIOS	Model B. Shared Regional High School		Secondary High School Regional District (9-12) on single campus, 8 Towns Elementary Regional Districts (K-8) remain intact	
	1) High schools merge, 2 elementary districts (K-8) remain independent		<ul style="list-style-type: none"> Students at Mt. Everett (9-12) attend combined high school region on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed Elementary schools (K-8) remain as is, forming two elementary regional districts Overall, three regional districts operate 	
	2) High schools merge, elementary districts (K-8) merge		<ul style="list-style-type: none"> Students at Mt. Everett (9-12) attend combined high school region on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed Elementary schools (K-8) remain as is but form a single elementary regional district Overall, two regional districts operate (K-8, 9-12) 	
SCENARIOS	Model C. Collaboration		Formation of a collaborative or additional collaboration Both districts and all schools remain intact	
	1) Formal Collaborative		<ul style="list-style-type: none"> The creation of a formal MA approved collaborative across the 8 Towns Could include additional Berkshire Districts 	
	2) Additional Shared Services & Collaboration		<ul style="list-style-type: none"> Building upon existing collaboration and historical planning efforts in formalizing a shared services approach across the two districts This could also include the formation of a consortium (a modified Education Service Agency) to include the two districts and, likely, additional Berkshire school districts. 	
OPTIONS	ALTERNATIVES that can be applied to all models			
	Cost Center		<ul style="list-style-type: none"> Differentiated assessments by towns associated with schools in operations Protects operation of schools 	
	Supervisory Union		<ul style="list-style-type: none"> Shared superintendent and (potentially) administrative/central office staff Allows for operations of both districts and all schools, autonomy to districts, and local control/governance Builds opportunities for collaboration and alignment 	
	Consolidation of elementary schools		<ul style="list-style-type: none"> Could include grades 7-8 (as outlined in Model A) Could include elementary schools in SBRSD into Undermountain 	

As this table displays, there are three scenarios for Model A (Regionalization), two for Model B (Shared High School) and two for Model C (Collaboration). Additionally, we have presented three options that could be applied across all three models: cost-center, supervisory union, and consolidation of elementary schools.

These models are illustrated in the schematic below.

RSDPB Models Schematic.



This schematic includes:

- **Top Row:** Each district with corresponding school (MM-Monument; WEB-W.E.B. DuBois; MB-Muddy Brook; ME-Mount Everett; UM-Undermountain; NM-New Marlborough; SE-South Egremont)
- **Middle Row:** All three Models (A, B, C)
- **Lower Rows:** Scenarios within Models (A, B, C)

Each solid blue box signifies a district. Thus, under Model A, one blue box represents one district. Similarly, under Model B the two scenarios yield two or three blue boxes, meaning two or three total districts. Groupings in the various models (such as the white box) and white parentheses suggest that schools could be grouped together, **or** maintained as independent. NHS, in Model B, represents the New High School, which is also available in Model A if MM and ME merge.

The models and scenarios result in several key outcomes that are summarized below, to ensure that the reader has initial clarity regarding what each yields.

RSDPB, Summarized Impact of Models

Each of the models and scenarios will be examined in greater detail in the next section. The aim is to offer background about the model, identify the benefits and barriers, and examine the fiscal ramifications of each. Both models A and B both involve regionalization, while Model C is collaboration in two forms.

Model A. Full Regionalization						
	# districts	# schools*	Central Office**	Students	Staff	Governance
1) All schools remain open and as currently structured	1	7	1	No change, all students attend same school as is.	Central office and operation can consolidate. School staff remain as is.	One school committee
2) Grades 9-12 merge	1	7	1	9-12 school students attend at new high school in GB. All other students attend school as is.	Central office and operation can consolidate. High school staff consolidate in new school. All other school staff remain as is.	One school committee
3) Grades 9-12 merge & Grades 7-8 merge	1	6	1	9-12 school students attend at new high school in GB. 7-8 students attend at W.E.B DuBois. All other students attend school as is.	Central office and operation can consolidate. High school staff consolidate in new school. All other school staff remain as is.	One school committee
Model B. Shared Regional High School						
1) High schools merge, 2 elementary districts (K-8) remain independent	3	7	3	9-12 school students attend at new high school in GB. All other students attend school as is.	Central offices remain, with the potential to add a third. High school staff consolidate in new school. All other school staff remain as is.	Three school committees
2) High schools merge, elementary districts (K-8) merge	2	7	3	9-12 school students attend at new high school in GB. All other students attend school as is.	Central offices remain but will be reorganized K-8, 9-12. High school staff consolidate in new school. All other school staff remain as is.	Two school committees
Model C. Collaboration						
1) Formal Collaborative	2+	7	2+	No change, all students attend same school as is.	Central office and operation remain as is. School staff remain as is. Additional staff will be needed for Collaborative.	Two school committees, one collaborative board.
2) Additional Shared Services & Collaboration	2	7	2	No change, all students attend same school as is.	Some consolidation of central office and operations staff is optional. School staff remain as is.	Two school committees
*Number of schools could be reduced by consolidating other schools.						
**Number of central office staff could be reduced by using a supervisory union model.						

Models, Assumptions

There are a number of assumptions that underscore the evaluation that will follow. These have been derived by the team, through feedback from the board and various stakeholders, and from the literature. These reflect issues that have been raised as critical considerations and parameters, needed to conduct the modeling.

1. Transportation.

Assumption: No student will be on a bus for more than one hour to travel from home to their designated school.

Background: A transportation brief has been written and is available [here](#). This brief examines travel times and general costs (increase, decrease, stay the same) for a variety of scenarios. It also carefully considers developmentally appropriate travel times based on age (we believe elementary students should have shorter transit times, although it is not out of the norm to have high school students on a bus for an hour to attend a school that offers a diverse range of appropriate courses and programs).

Considerations: There are scenarios that are more expensive and result in longer transit times, thus are undesirable. There are other scenarios that result in no impact to cost, and a mix of adjusted transit times (shorter for those in towns such as Alford, Egremont, Monterey and parts of New Marlborough, while longer for Sheffield students and some outlying areas). Specific transit times (routes and costs) can be precisely determined once a preferred model is determined and policies such as intra-district choice are settled.

2. Job Loss.

Assumption: Any reductions in personnel (often referred to as full-time-equivalents/FTE) will occur through attrition, not layoffs.

Background: Most real savings in any consolidation effort are realized through school closures and/or the merger of schools/staff into fewer facilities. This allows for class size balancing in order to ensure class sections are full (at the target class size level). Because personnel costs often account for approximately 85% of total expenditures, reduction in FTEs can save districts funds that can often be reinvested back into the schools. Several of the research Models and Scenarios have reductions in FTEs at the central/administrative office, the high school, and the middle grades.

Consideration: Recognizing the reality that any merger/consolidation will take place over a number of years, FTE reduction can be realized through attrition, defined as the natural movement of staff out of a district typically through retirement or resignation. In some cases, not all roles can be accounted for through attrition and reinvestment from savings may allow for reallocation/reassignment of staff through career ladder opportunities such as instructional coaches, interventionists, and administrators/directors. Of note, both districts (like others across the region) are experiencing talent recruitment challenges/shortages with, in some cases, remaining open and unfilled positions and unlicensed staff.

3. Class size.

Assumption: The research team will use average class size parameters of 22 and 24 for any models that examine mergers in grades 9-12 or 7-8. No merger of elementary schools is planned in the three main Models, thus class sizes (relatively small) will continue as is.

Background: Class size balancing, often referred to as cohort management, is the ability to maximize teaching resources by ensuring class sections and courses are full. When this occurs, it allows for reduction in teachers and support staff, savings that can be reinvested in new teaching and learning resources and/or to manage budgets. While class sizes across both districts are lower than state averages, there are middle and high school classes (mostly in BHRSD) that average/exceed 22.

Consideration: Class size is an often hotly debated situation in many districts, with many (parents and teachers typically) arguing that smaller class size is better for students and teachers. The research is mixed, with contemporary literature saying the effect is small, “Small classes are popular, but evidence of their positive impact on student outcomes is disappointing—and the choices districts make about class size have real, though often hidden, costs.” Often large class sizes refer to numbers over 24 and small classes are those under 15. The research team selected 20 and 22 as middle/upper range averages and as consistent with best practices associated with resource management. A DESE Brief outlines some of the salient points about the research, [DESE Policy Brief, Class Size and Resource Allocation](#).

4. Grade configuration

Assumption: Our modeling did not consider grade reconfiguration, with the one exception being Model A, Scenario 3 - moving grades 7 & 8 to W.E.B. DuBois.

Background: BHRSD and SBRSD operate their two middle schools with different configurations. W.E.B. DuBois enrolls students grades 5-8 while Mt. Everett enrolls students in grades 6-12. While the organization of middle school models across the state/nation varies, both districts have researched and implemented justifiable approaches. This does present some challenges associated with potential consolidation.

Consideration: Model A, Scenario 3 is the most aggressive model presented by our Team. This model only works in tandem with a high school merger (9-12) on the Great Barrington campus. Grades 7 & 8 are often where content/curriculum become more differentiated and leveled (for example, in math and languages). Grade 6, in contrast, often follows a more traditional elementary setup (often 2 person teams versus content/course specific). Additionally, moving grades 7-8 to W.E.B. DuBois (where space is available) allows for articulation with the high school curriculum including pre-career/CVTE exploration and awareness (The CVTE brief discusses the impact of middle-grades pre-vocational experiences). It also allows for the movement of teachers and alignment of curriculum across all subject areas and across both buildings (7-12). Finally, if grades 7-8 were moved to W.E.B. DuBois, SBRSD grade 6 could be moved into the Undermountain facility allowing an opportunity to close/repurpose Mt. Everett (as outlined in the facilities memo). This also retains students close to their home community through the elementary grades.

5. High school construction

Assumption: Any models involving a high school merger (9-12) would be part of the planned reconstruction of a new high school on the current Great Barrington campus.

Background: BHRSD has, since 2008, been working to invest in renovation/reconstruction of their high school. After several years of rejection by the MSBA (outlined in the facilities brief) BHRSD has been accepted into the MSBA Eligibility Phase (March 2022), with planned funding for a new school on/around 2024.

Consideration: While Mt. Everett is a suitable high school facility; the impending MSBA BHRSD project affords a unique opportunity to “right size” a high school for enrollment, educational programming, and CVTE shops for students in all eight towns. Moreover, designs that promote contemporary content, skills, competencies and experiences can be planned into the facility. Geography does matter, and a high school in Great Barrington has the advantage to centrally draw from all directions in south county (Farmington River, Richmond, Lee & Lenox). While there are ideas for a high school on the Fairgrounds (or other sites more centrally located to BHRSD and SBRSD), securing any new site would involve a number of additional steps and studies (site analysis, purchasing, transportation study) that would impact the project.

6. School Closures, maintenance of elementary schools

Assumption: Facilities closures have been, generally, avoided in the various Models, with one exception being Model A, Scenario 3 - moving grades 7 & 8 to W.E.B. DuBois, resulting in the full closure of Mt. Everett. Additionally, the construction/merger of a new high school in Great Barrington means the “closing” of two high schools (grades 9-12) and the opening of a new 8 town regional high school.

Background: As past case study/research demonstrate, significant savings are mostly realized through the closure of school facilities and merger/consolidation of students and staff. School closures, however, can be deal breakers in consolidation given the level of loss a community may experience, and the emotional/political opposition to such a decision.

Consideration: Only one scenario, Model A, Scenario 3 has school closure included. This would result in the closure of Mt. Everett, which is actually part of a larger central office-Undermountain physical plant. Issues related to remaining capital debt and potential repurposing of the facility must be addressed for this model to be realistically considered.

An additional set of options are offered as overlays, in that they can be applied across all the models. One of these options is closure of elementary schools - namely New Marlborough and South Egremont. While this is not modeled, both schools should be monitored for both enrollment and ongoing facilities investments (neither of these two schools is rated a 1 by the MSBA and will need ongoing capital investments). Additional guidance, policy and regional agreements, related to school closure can be found in the Appendix I of the [Buildings and Capital report](#).

7. Financials (personnel)

Assumption: Financial modeling sets fiscal savings and costs as parameters at \$50,000 and \$70,000 FTE for teaching positions and 35% as fringe. Additional compensation (10%) was included in some cases where a single district-level position would be assuming greater responsibilities. A focus was made on positions that were better understood including classroom teaching (middle and high schools), and central office and district positions. Positions that reflect special education and paraeducator roles were left as is, given any consolidation will require a closer look at these units, student need, and staffing responsibilities/levels required to meet these needs.

Fiscal Assumptions Listed:

- Teaching positions are examined at \$50,000 and \$70,000 levels for both savings and added expenses
- Course/class savings at the middle and high school were made through an analysis of current schedules and balancing class size to 20 and 22. Estimations of class periods needed to operate a combined high school involved an analysis of current core courses, electives, and CVTE. An eight period schedule was used to conservatively configure course/class demand.
- Central Office and District positions are examined based on actual costs, often determined by average spending across the two districts
- Additional compensation (10%) was built into the model when a role was deemed to have new/additional responsibilities added as a result of the consolidation.
- A 35% fringe benefit adjustment was used for any personnel changes.
- Legacy debt & revenue (capital, other post-employment benefits (OPEB), revolving revenue) will be factored into assessments as assigned to the “originating” district/town. A new regional agreement will adjust these costs as the transition from the current district configuration to the proposed one.
- The new high school construction project will be examined as a separate fiscal exercise given it is a recent and still emerging development in the RSDPB process and will require ongoing discussions across the 8 Towns. Our models will offer a starting point.
- Town assessment assumptions/parameters will be discussed further below.
- Tuition dollars (current and future) could be adjusted to reflect more realistic costs associated with what it costs to educate a child at the various grade span levels and programs (such as CVTE).
- Unemployment has not been factored in, recognizing that staffing reductions are modeled as through attrition. If needed, unemployment will add additional liability of up to 50% of wages, up to \$698/week, for 26 weeks.

Background: The team has gone through a process of building a model based on the FY21 budget (real costs) through deep analysis of existing revenue and spending patterns. These models allow for flexibility in changing parameters and discussing whether the consolidation assumptions are realistic, or not.

Consideration: Additional fiscal analysis will be needed as the RSDPB and 8 Towns move towards a preferred option. Our models allow for a significant amount of flexibility to run alternative scenarios and options. Additionally, specific considerations regarding

how costs are assigned across districts will be needed to more precisely calculate fiscal impact.

Models, Financial Introduction

The goal of this section is to provide an overview of BHRSD and SBRSD finances leading into an analysis of the three models. While general financial data has been provided to the finance subcommittee in several presentations (available [here](#)), and in summary form to the full board, our team recognizes that the fiscal implications are critical considerations and must be detailed. Below, is an overview of finance that will set-the-stage for the evaluation of the models that follows.

Background and Projections

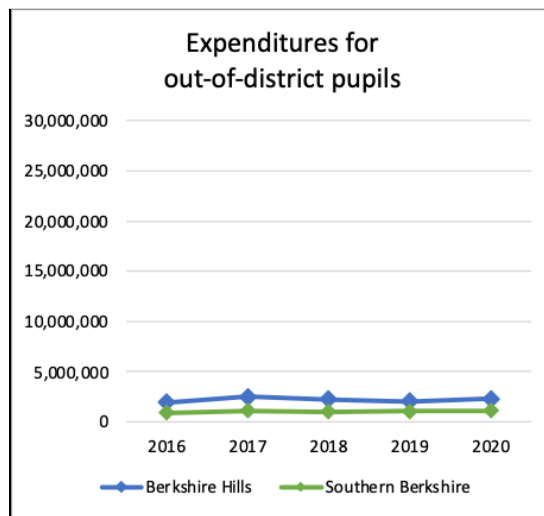
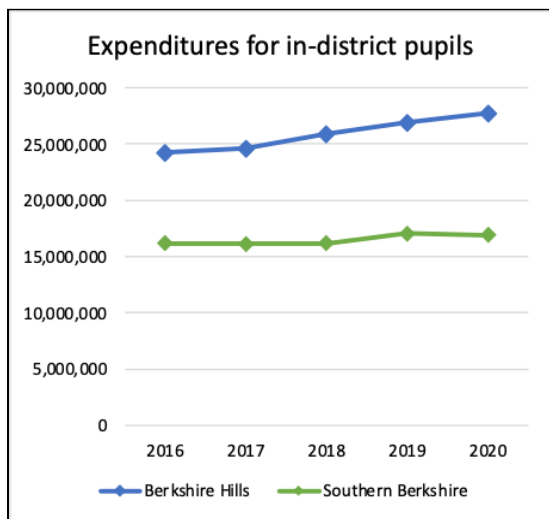
We will briefly review financial data from several presentations to the RSDPB and the Finance Subcommittee as background for the financial implications of the proposed models and scenarios. We note that we refer to the regional K-12 district most often as the future option. This is not because it is what the towns will necessarily choose, but because the differences between present and future finances are most clear for this option.

- District financial profiles from DESE data
- Financial projections to FY2026 as separate districts
- Chapter 70 state aid projections
- The impact of students choosing across districts
- Managing legacy assets and obligations in a transition to a combined district
- Baseline for financial modeling

District financial profiles from data

Both districts spent more per pupil, and had a higher increase in spending per pupil over five years, than state averages.

DESE's most current district financial data is from 2020 (FY2019-2020), and trends shown here are for 2016 to 2020. DESE data includes expenditures from all sources of funding: general appropriations, federal and state grants, and local revolving funds. Per-pupil spending is calculated for in-district pupils. Out-of-district spending is reported only in dollars. Capital and debt expenditures are not included. ([Link to DESE source: expenditure data from fiscal years 2016–2020](#))



In-district Total \$	2016	2017	2018	2019	2020	Change %
Berkshire Hills	24,237,573	24,617,372	25,890,990	26,907,389	27,734,003	14.4%
Southern Berkshire	16,176,851	16,148,915	16,183,134	17,061,182	16,902,467	4.5%
State	13,607,724,142	13,987,635,762	14,482,394,710	14,969,854,942	15,282,497,042	12.3%

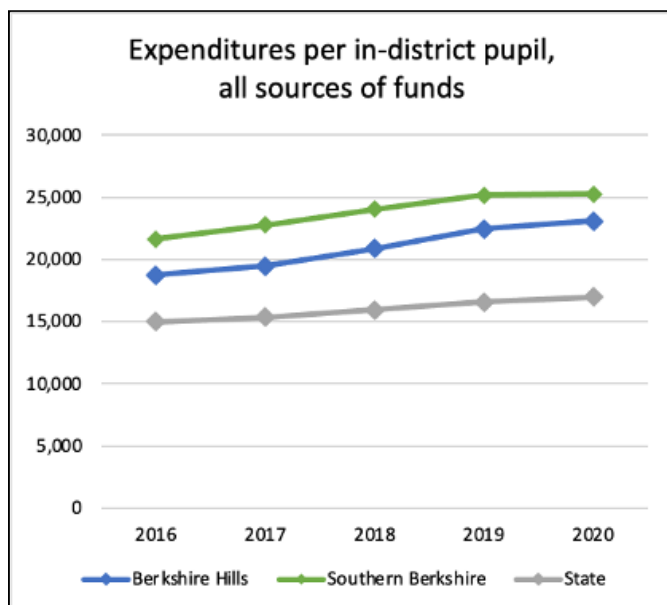
Out-of-district \$	2016	2017	2018	2019	2020	Change %
Berkshire Hills	1,934,464	2,469,669	2,235,297	2,027,411	2,253,383	16.5%
Southern Berkshire	896,636	1,080,716	988,899	1,063,111	1,098,976	22.6%
State	1,605,688,637	1,722,167,299	1,804,465,169	1,899,846,719	1,979,545,177	23.3%

From 2016 to 2020, spending in-district increased by 12.3% across the state, Berkshire Hills increased by 14.4%, and Southern Berkshire increased by 4.5%. Their lower increase suggests that substantial budget cuts were made during this period.

Data on **per-pupil spending** is used to compare districts more “apples to apples”. When looking at multiple years however, changes in both expenditures and number of students determine spending per pupil. In districts like these two with declining enrollment, even if budget increases are held to a minimum the per pupil cost will go up because the dollars are spread across fewer students.

Both districts spent much more *per in-district pupil* than the state average, and their increase in spending per pupil over five years was greater than the state’s (*see table and chart below*). Some reasons for higher expenditure levels may include their small size; the cost of transportation for geographically large districts; the relative wealth of their member towns compared to municipalities across the Commonwealth; and local expectations about what schools will provide.

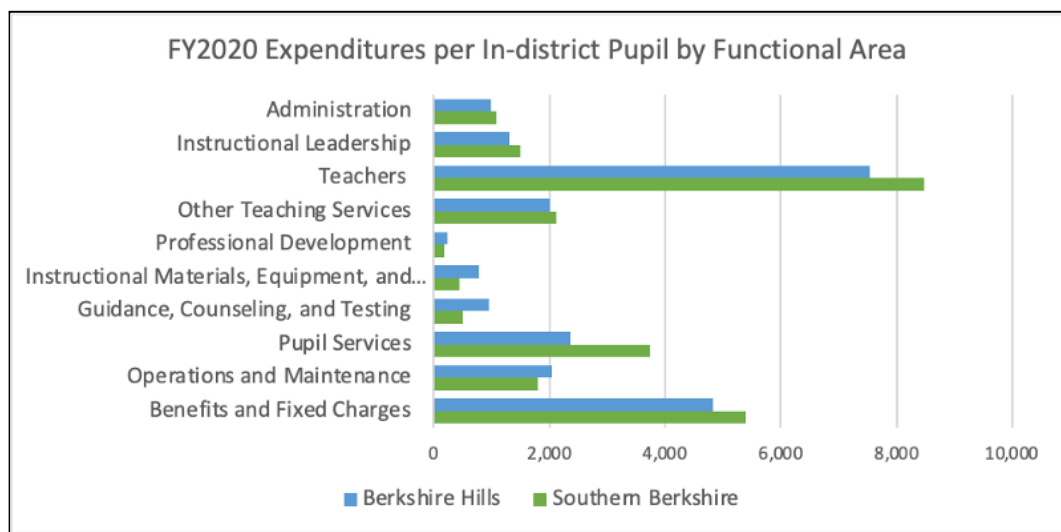
Over the five years, the state increased spending per in-district pupil by 13%, Berkshire Hills by 23%, and Southern Berkshire by 17%. Dollars per pupil increased at a higher rate because while expenditures increased student enrollment declined, so dollars were distributed across fewer students. In 2016 Southern Berkshire spent almost \$3,000 more per in-district pupil than Berkshire Hills, but the gap narrowed to about \$2,250 in 2020, reflecting the lower rate of spending increase shown above.



\$/In-district Pupil	2016	2017	2018	2019	2020	Change %
Berkshire Hills	18,747	19,474	20,890	22,462	23,073	23.1%
Southern Berkshire	21,618	22,764	24,043	25,171	25,254	16.8%
State	14,970	15,350	15,953	16,577	16,963	13.3%

Although both districts spent more than the state, they spent differently in functional areas, as shown in the chart below. The areas where Southern Berkshire spent the most per pupil compared to Berkshire Hills were pupil services, teachers, and benefits/fixed charges. The areas where it spent the least compared to Berkshire Hills were guidance and instructional materials; however, these are small percentages of the total compared to pupil services, teachers, and benefits.

FY2020 Expenditures Per In-district Pupil	Berkshire Hills	Southern Berkshire	Difference
<i>In-district Pupils</i>	<i>1,202.0</i>	<i>669.3</i>	<i>-532.7</i>
Administration	986	1,086	100
Instructional Leadership	1,317	1,494	177
Teachers	7,545	8,476	931
Other Teaching Services	2,014	2,130	116
Professional Development	240	184	-56
Instructional Materials, Equipment, and Technology	779	441	-338
Guidance, Counseling, and Testing	962	510	-451
Pupil Services	2,357	3,730	1,373
Operations and Maintenance	2,040	1,808	-232
Benefits and Fixed Charges	4,833	5,395	562
Total In-District Expenditures Per Pupil	\$23,073	\$25,254	\$2,181



Financial projections to 2026 as separate districts

Because some revenue sources were projected to be flat or even decrease, projected increases in spending will require town assessments to increase at a higher rate, or budget cuts of staff and programs to be made.

For the Massachusetts Association of Regional Schools (MARS) study in 2020 The Abrahams Group used historical data to project expenditures and revenues to FY2026 for Berkshire Hills and Southern Berkshire if they continued as separate districts. (Links:

Microsoft PowerPoint - Berkshire Hills Baseline Oct Final (3) (2).pdf

Southern Berkshire Baseline Oct Final (3) (1).pptx

For both districts, The Abrahams Group projected a gap between revenues and expenditures that would increase over five years if town assessments increased at only the average rate of previous years. Unless budget cuts were made, the likely source for covering these funding shortfalls would be town assessments, which would have to increase at a faster rate than in the past. A summary of The Abrahams Group's findings follows; the original reports with greater detail are linked above.

From FY2013 to FY2019 Berkshire Hills school committee expenditures increased by a rolling 6-year average of 3.6%. During this period enrollment declined each year, so the rate of increase already factored in the decreasing numbers of students being educated by the district.

Town assessments were about 75% of total revenues, and increased from FY2013 to FY2019 by a rolling 6-year average of 4.1%. They increased at a higher rate than expenditures because other revenues such as Chapter 70 and Chapter 71 state aid remained flat. The district dipped into its Excess and Deficiency funds to reduce assessments in FY2019 and FY2020.

Projections based on past trends indicated that without even steeper increases in town assessments there would be increasing budget shortfalls from FY2021 to FY2026, with a cumulative shortfall of \$2.2M. These shortfalls would be made up largely by increased town assessments, or by substantial budget cuts.

Berkshire Hills Projections Summary

Description	FY21	FY22	FY23	FY24	FY25	FY26
Revenues	\$ 31,146,936	\$ 31,933,876	\$ 32,970,363	\$ 34,047,239	\$ 34,910,048	\$ 36,130,365
Expenses	\$ 31,146,936	\$ 32,300,842	\$ 33,279,283	\$ 34,350,002	\$ 35,524,795	\$ 36,741,880
Shortfall	\$ -	\$ (366,966)	\$ (308,919)	\$ (302,764)	\$ (614,747)	\$ (611,515)
Cumulative Shortfall		\$ (366,966)	\$ (675,886)	\$ (978,649)	\$ (1,593,396)	\$ (2,204,911)
Annual % Shortfall		-1.1%	-0.9%	-0.9%	-1.7%	-1.7%
Numbers may be off due to rounding						

From Berkshire Hills RSD - Baseline Analysis, October 2020, slide 41

Southern Berkshire's school committee expenditures increased by a rolling 6-year average of 2.9% from FY2013 to FY2019. During this time enrollment declined each year, so the rate of increases already factored in the decreasing numbers of students being educated by the district. The lower rate of increase than Berkshire Hills presumably reflects the budget-cutting indicated in DESE data above.

Southern Berkshire town assessments were 78% to 81% of total revenues, and increased from FY2013 to FY2019 by a rolling 6-year average of 2.9%, about the same as expenditures. Projecting revenues line by line, with town assessments increasing at the historical rate but some other revenues remaining flat or declining, a budget shortfall was projected starting in FY2023, increasing to a shortfall of \$261,000 by FY2026. It was smaller than the shortfall projected for Berkshire Hills not only because the district is smaller, but because it had held down expenses more. The shortfall, however, would have to be made up by increasing town assessments at a greater rate, or cutting budgets further.

Southern Berkshire Projections Summary

Description	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026
Total Revenues	17,533,097	18,081,369	18,534,127	18,999,061	19,476,119	19,966,046
Expenses	17,533,097	18,041,557	18,564,762	19,103,140	19,657,131	20,227,188
Excess (Deficiency) of Rev > Expenditures	-	39,812	(30,635)	(104,079)	(181,012)	(261,142)
Cumulative Excess (Deficiency) of Rev > Expenditures			9,177	(134,714)	(285,091)	(442,154)

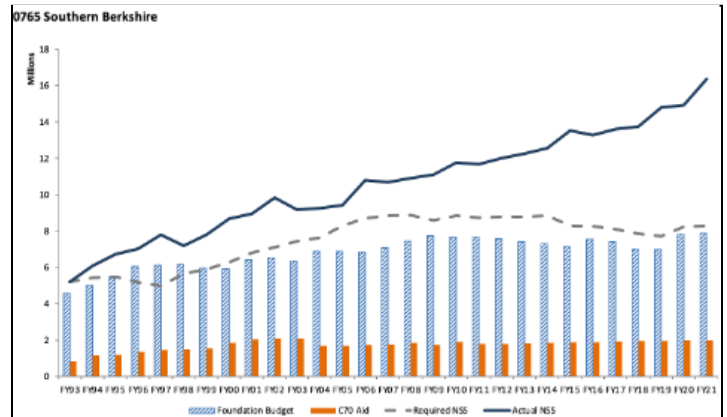
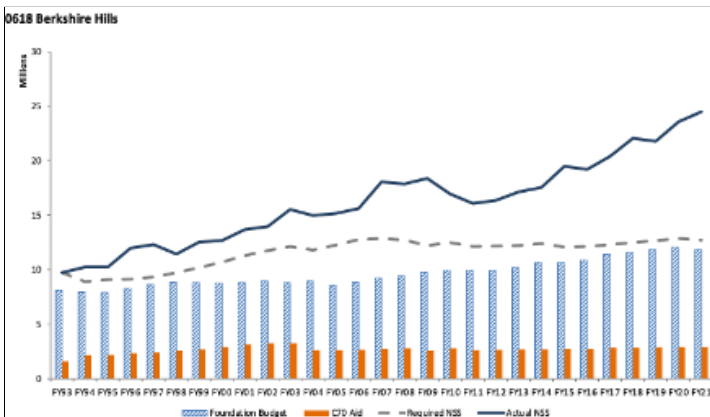
From Southern Berkshire RSD - Baseline Analysis, October 2020, slide 42

These trends and projections indicate that the districts will spend more money each year, even though they educate fewer students. Every year, facing shortfalls, there would be pressure to cut staff and programs to limit increases in town assessments. These projections also indicate that the DESE data trend of spending *per pupil* increasing at a higher rate than spending would continue because higher spending would be distributed across fewer pupils.

Chapter 70 state aid

Future aid increases will be limited, causing pressure to increase town assessments or cut budgets.

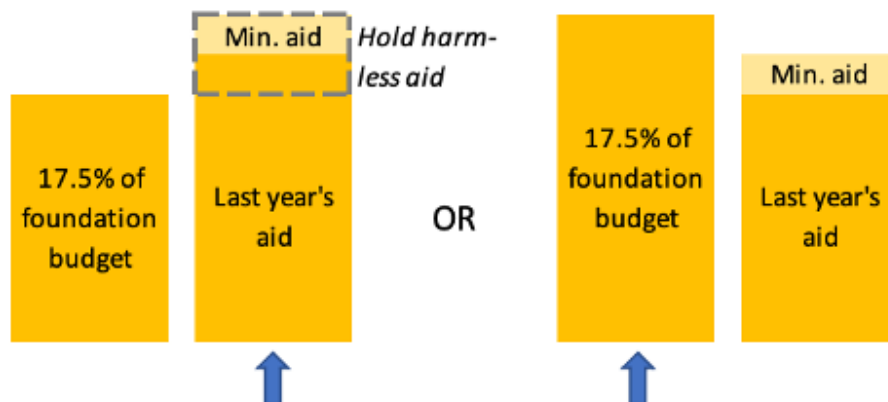
Chapter 70 charts provided by DESE clearly demonstrate that aid (orange bar) has remained approximately flat for many years, and that town assessments (top line minus aid) have covered a higher and higher proportion of the costs known as "actual net school spending." The dashed blue line represents the level of spending required by the state, and the gap between the blue and dashed lines represents the amount that towns choose to spend above that required amount. The gap has been increasing sharply in recent years. Link: [Chapter 70 District Profiles](#)



Both districts have received flat aid for many years because they get “hold harmless” aid. Districts with declining enrollment are held harmless (receive at least the same amount of aid) even though their foundation budgets decrease because they have fewer students. Aid increases are limited to minimum aid, a per student amount set by the legislature in most years, most recently \$30 per student. The difference between foundation aid (calculated by formulas) and last year’s amount plus minimum aid is “hold harmless” aid.

For Berkshire Hills, the amount of hold harmless aid (or aid reductions not made) in FY2021 was \$860,271 or \$887 per resident student. Southern Berkshire received aid above formula of \$425,392, or \$634 per resident student.

In sum, there are two ways that aid amounts are calculated for districts; one is to run all the formulas embedded in the program (foundation aid), and the other is to start from the previous year’s aid plus any minimum aid amount set by the legislature (foundation plus hold harmless aid). The higher amount is allocated to the district.



Given the state’s methodology, calculated aid increases if:

- Foundation enrollment (resident students) increases
- More resident students become economically disadvantaged or vocational-technical students, which have significantly higher rates per student
- Inflation or other technical rate adjustments are large enough

The state is now implementing the Student Opportunity Act (SOA) over seven years beginning in 2021, which has significant increases in rates. These increases are especially targeted to economically disadvantaged students and vocational-technical students, but they also raise foundation rates for benefits and special education which will have an impact on foundation budgets for all districts. For Berkshire Hills and Southern Berkshire however, even with the SOA rate increases, formula Chapter 70 aid does not increase enough to be greater than held harmless aid until FY2024.

Even with the SOA rate increases over seven years, a district with declining enrollment may well find that future rate increases do not continue to offset foundation budget decreases caused by fewer students. In that case, a district would once again be held harmless, getting the previous year's aid increased only by any minimum aid allotment provided by the legislature.

The impact of Chapter 70 aid on local revenues for these districts is also limited for two reasons; the towns have relatively high personal income and property value levels so they receive the capped minimum aid rate of 17.5% of their foundation budgets, and their spending levels are almost double the foundation budget. In FY2021 Berkshire Hills spent 93% more than required, and Southern Berkshire 97%, which means that any aid increases would be a small proportion of their total budgets.

An expansion of student enrollment in certified CVTE programs would cause a more significant increase in the formula aid calculations than any factors discussed above. Foundation rates for CVTE students are \$5,222 more than regular high school students of which, for these towns capped at 17.5% aid, \$914 per student would be added to their formula aid calculation.

A last important issue related to Chapter 70 aid is whether merging into an 8-town region would affect required town contributions either up or down. DESE's School Business Office ran a projection of Chapter 70 figures for an 8-town region in FY2023, as compared to figures for the two existing districts in the FY23 aid amounts already included in the Governor's budget.

Analysis shows that in both workbooks, each town's share (Required Local Contribution or RLC) of the Required District Contribution (RDC) (of either the existing districts or the proposed 8-town district) changes, and that the change is driven by DESE's calculation of the RLC. DESE calculates a Target Local Share (TLS) for each town, a Preliminary Contribution (PC) for each town, and then a Shortfall from Target Local Share (STLS) if there is a difference. DESE then adds a 1% or 2% (of Preliminary Contribution) increment depending on the shortfall percentage, and an additional 'Special Increment Toward the 82.5% Target' if the town's Combined Effort Yield is greater than 175% of the Foundation Budget.

The net effect of this series of calculations is that each town's relative proportion of the Required District Contribution shifts in FY23, as the Preliminary Contribution of some towns is increased to bring them closer to their Target Local Share. This screenshot from the Chapter 70 workbook (filtered for these eight towns) shows the calculations and relative shifts:

Table 10: Relative changes in each town's Required Local Contribution

LEA	Town	target local share	required local contribution FY22	mrgr FY23	preliminary contribution FY23	dollar increment toward target	CEY% > 175% increment	required contribution FY23	percentage of foundation
6	Alford	82.50	200,714	4.02%	208,783	0	0	204,889	82.50
90	Egremont	82.50	812,414	3.72%	842,636	16,248	122,428	981,312	82.50
113	Great Barrington	82.50	7,334,795	3.93%	7,623,052	73,348	0	7,696,400	77.98
193	Monterey	82.50	764,625	3.75%	793,298	15,293	118,803	927,394	82.50
205	New Marlborough	82.50	1,204,285	4.78%	1,261,850	0	0	1,229,336	82.50
267	Sheffield	82.50	3,512,505	5.28%	3,697,965	35,125	0	3,733,090	79.33
283	Stockbridge	82.50	1,266,063	3.59%	1,311,515	25,321	154,184	1,491,020	82.50
333	West Stockbridge	82.50	1,266,063	3.50%	1,310,375	0	0	1,310,375	80.01

The result is a shift in actual dollars, percentages, and per pupil calculations. This edited and the adapted worksheet from the workbook shows the shifts for Berkshire Hills:

Table 11: Effects of relative changes of Required Local Contributions on relative shares of Required District Contribution

Berkshire Hills FY23 Chapter 70 H1 changes in relative shares of Required District Contribution												
LEA	Member	Foundation Enrollment in Regional District				Required Minimum Contribution to Regional District						
		FY22	FY23	Change	% change	FY22	FY22 RMC PP	FY23	FY23 RMC PP	Change	FY23 RMC change PP	% change
113	Great Barrington	697	692	-4	-0.6%	7,334,795	10,530	7,696,400	11,117	361,605	586	4.9%
283	Stockbridge	120	127	7	5.4%	1,266,063	10,530	1,491,020	11,761	224,957	1,231	17.8%
333	West Stockbridge	120	115	-5	-4.4%	1,266,063	10,530	1,310,375	11,405	44,312	875	3.5%
Total		937	934	-3	-0.3%	9,866,921	10,530	10,497,795	11,240	630,874	709	6.4%

these columns calculated (everything else cut and paste from Regional District Members worksheet)

When towns view projected assessments in the modeled 8-Town regional school district, it will be critical for them to understand that the increases noted above, the result of DESE changes in the calculation of the RLC for each town, are independent of any regionalization, modeled or actual. These amounts are assigned to each town irrespective of their regional district membership, or lack thereof.

RLCs for each town form the first part of the assessment calculations within each regional school district. Added to the DESE-defined RLC is the Local Contribution Above Required, which is described in each regional agreement, and is generally based on each town's relative number of public school students, either those resident in each town, or according to the number of town residents attending district schools. In either case, the methodology is consistent within a regional school district.

A full discussion of Chapter 70 FY23 projections document can be accessed [here](#).

The impact of choicing across districts

A merged district would incorporate 161 students who currently choice between the existing districts, reducing the expenditures and revenues currently associated with them, and effectively allowing funds to follow students more equitably in a merged regional budget.

Link: [Student Flow Narrative](#)

To understand these districts, their financial profiles, and the impact of a possible merger into an 8-town district, we have to look more closely at *resident students* (enrolled locally or in another district) and *non-resident students* (choicing in or tuitioning in). The number of resident students can be quite different from the number of enrolled students. The choice program gives students and families the ability to go to any district that is admitting non-residents, and to which families can provide transportation. However, only \$5,000 is transferred as revenues per student to the receiving district, far less than the state-wide average spending of \$16,963 per in-district pupil in 2020, and over \$23,000 and \$25,000 in these particular districts.

Over the last five years the two districts had increasingly different profiles for resident and enrolled students. Berkshire Hills admitted more and more non-residents, who by 2021 were 28% of the student body. The great majority of these were choice students, but the district also contracted for tuitions to provide grades 7 to 12 to students from nearby elementary districts, which averaged about \$9,500. Only a small fraction of resident students enrolled in other districts.

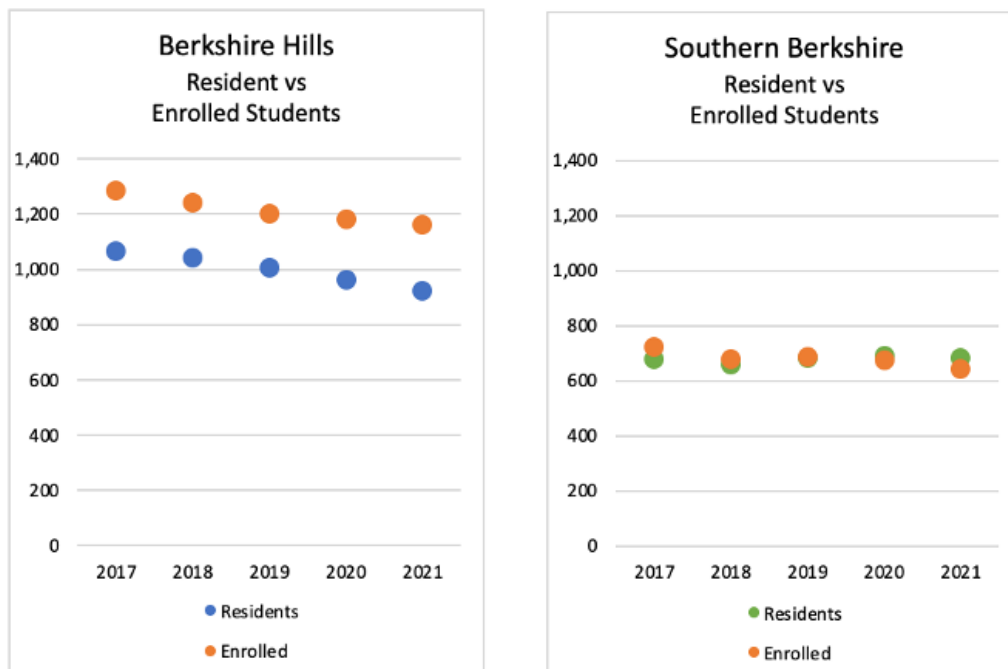
By contrast, a larger number of resident students in Southern Berkshire enrolled in other districts using the choice program, and the number of non-residents choicing in steadily decreased, from 19% to 13% of the student body. Over the last five years, Berkshire Hills became more of a “winner” in the choice program competition for students, and Southern Berkshire flipped from being a net “winner” to a net “loser”, sending more funds to other districts than it received in revenues from choice.

At the scale of non-resident student enrollment in Berkshire Hills, there are financial impacts. Choice students bring about \$5,000 each, and tuitioned students coming for secondary grades currently bring an average of \$9,500 per the tuition contracts negotiated by Berkshire Hills. When so many students bring revenues much lower than average spending per student, town assessments have to provide a greater share to operate the schools.

Non-resident students also do not contribute to capital debt. With the prospect of major high school construction, having more than a quarter of enrolled students not contributing to debt payments would mean a significant subsidy from member towns for non-resident students.

The following sets of charts illustrate the impact of non-residents on district revenues and spending in these two districts. These charts compare the number of resident students (all residents whether they enroll in local schools or elsewhere) to enrolled students (enrolled residents plus non-residents.) Residents are the basis for Chapter 70 aid calculations (translated to foundation enrollment), but they may enroll in local schools supported by town assessments, or use choice or tuition agreements to enroll in other districts. In the other direction, non-resident students bring tuition revenues, which have generally been much less than average costs in these districts. (What is not shown directly in the charts

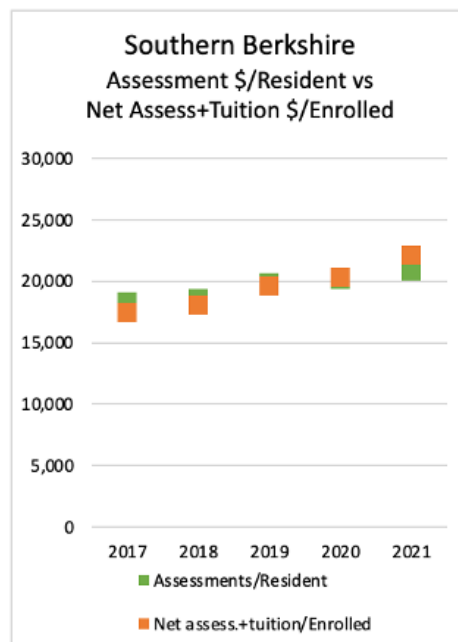
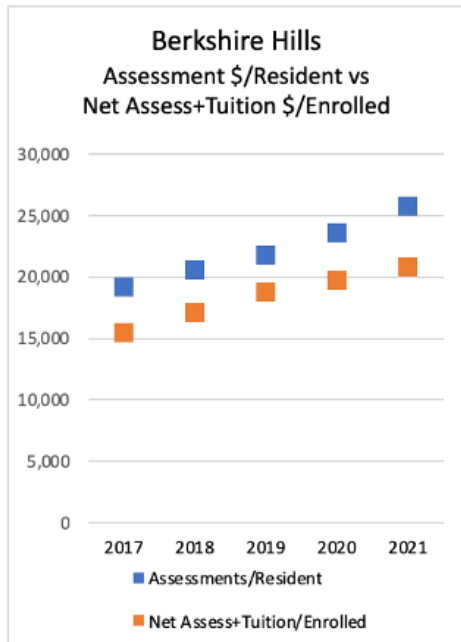
is that the number of residents leaving Southern Berkshire increased substantially, and decreased at Berkshire Hills.)



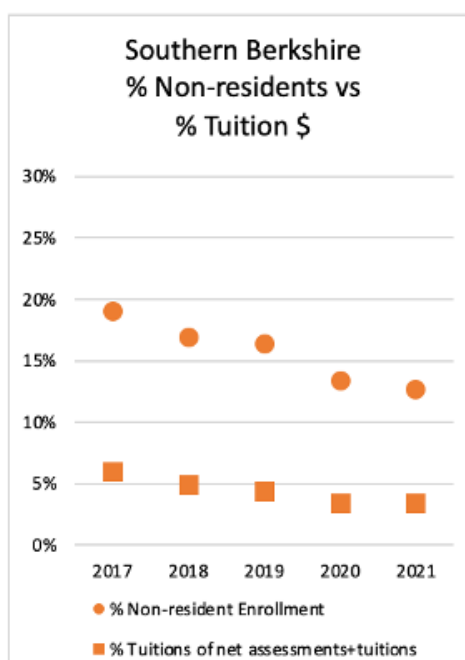
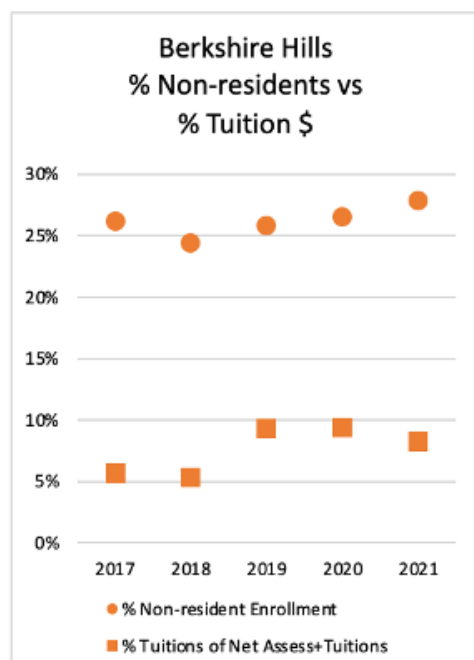
Town assessments are the largest portion of district revenues, and of great interest to the towns in considering the merits of merging the two districts. To show the impact on finances of the different revenue streams associated with residents and non-residents, we focus in the next two sets of charts on assessments as revenues per student, and tuitions directly attributable to non-residents. Districts have additional revenues, but they may directly support specific purposes (e.g. circuit breaker aid, MSBA payments) or be used for enrolled students (e.g. federal entitlement grants.)

Town assessments per *resident* student is a straightforward calculation. For dollars per *enrolled* student, we subtracted residents who left the district and the tuitions paid for them to get the number of resident enrolled students and net assessments. To those figures we added non-residents enrolling in the districts, and the revenues received for them. The charts below show what towns raise for the schools in assessments per resident student, and then what is available from net assessments and tuitions after the flows of students and dollars in and out of the district.

The charts show the gap between what is raised for resident students, and the amount that is spent on enrolled students after averaging revenues across them. At Berkshire Hills the large proportion of non-residents, particularly choice-in students with revenues of \$5,000 each, meant that net assessments plus tuitions was considerably less than assessments per resident, and the gap grew larger as the percentage of non-residents increased over these years. At Southern Berkshire the proportion of non-residents was smaller, and decreased over time, so that revenues spent on enrolled students came closer to what towns paid per resident.



We also looked at enrollment and students in terms of non-residents specifically. The charts below show the percentage of non-residents in the student body, and the percentage of their tuitions in revenues for the schools from net assessments and tuitions. Because non-resident tuitions were generally so much lower than costs, the non-resident students at Berkshire Hills contributed a much smaller proportion of revenues for the schools. While this was also true for Southern Berkshire, the smaller proportion of non-residents and the offset of students choosing out of the district meant the gap was smaller and decreasing.



If the districts decide to merge, the flows of students and dollars shown in all the charts above would change substantially. As described above, about half of all choice students in the eight towns choiced between the two districts. In a merger, they would become residents, and 98% of residents would be enrolled in the new district's schools (using 2021 data for modeling). Assuming the same number of students choiced into the new district, non-residents would be about 10% of the student body, and have less impact on average revenues for the schools. Some students would still be choicing *out* of the merged district, but their number would be reduced from 209 to 46.

In terms of expenditures, these shifts would allow assessment dollars to be more equitably distributed across resident students in the schools. In terms of town assessments, however, the imbalances in prior financing will require formula adjustments. Berkshire Hills town assessments have been, in effect, subsidizing non-residents in their schools. About half that subsidy has gone to Southern Berkshire students. To unwind these imbalances caused by prior student flow, adjustments are proposed to assessment formulas, which will be described later in the fiscal analysis.

Managing legacy assets and obligations in a transition to a combined district

Both districts have legacy assets to which their towns have contributed; they also have obligations attributable to one group of towns or the other. The disposition of these assets and obligations should be negotiated and confirmed in the regional agreement.

Both districts have assets and obligations from their prior and current operations that should be managed in the best interests of all towns and a future district. These include cash balances in revolving and excess and deficiency funds, and buildings. They also include construction debt, and obligations to retirees from the existing districts (pensions and Other Postemployment Benefits (OPEB.))

These two tables show cash balances in district accounts as of the end of FY2021. These will be quite different by the time any regional agreement is implemented. If regionalized, towns could decide to spend down balances for their appropriate purposes as much as practicable, or to endow a new district fund with proportional amounts. Some of the funds could be spent on one-time uses for specific school buildings or programs of the prior districts. In short, the towns can consider many options and determine what is fair and equitable before signing a regional agreement.

Accounts With Reserve Funds		Berkshire Hills		
		End of Year Balances		
		FY19	FY20	FY21
Revolving accounts	Circuit-breaker reimbursement	\$293,902	\$335,060	\$360,375
	Charter school reimbursement	\$0	\$0	\$0
	School lunch	\$26,399	\$3,625	\$49,220
	Athletics	\$47,072	\$73,660	\$66,821
	Tuitions - choice	\$521,023	\$652,799	\$926,043
	Tuitions - other	\$301,224	\$124,436	\$137,273
	Transportation reimbursement	\$153,872	\$394,358	\$297,829
	Other local receipts	\$114,151	\$131,143	\$129,649
	Private grants	\$129,331	\$259,099	\$100,570
Excess & Deficiency		\$711,449	\$1,068,436	\$2,109,565
Other reserves (please describe)		\$100,000	\$200,000	\$200,000
Totals		\$2,398,423	\$3,242,616	\$4,377,345

Accounts With Reserve Funds		Southern Berkshire		
		End of Year Balances		
		FY19	FY20	FY21
Revolving accounts	Circuit-breaker reimbursement	\$35,727	\$121,647	\$284,673
	Charter school reimbursement	\$0	\$0	\$0
	School lunch	\$27,546	\$25,590	\$86,054
	Athletics	\$33,080	\$23,033	\$8,983
	Tuitions - choice	\$532,110	\$294,280	\$338,096
	Tuitions - other	\$73,964	\$52,112	\$35,377
	Transportation reimbursement	\$0	\$1,145	\$1,145
	Other local receipts	\$85,350	\$213,956	\$212,773
	Private grants	\$216,444	\$55,576	\$60,296
Excess & Deficiency		\$530,000	\$530,000	\$330,000
Other reserves Stabilization Funds		\$120,757	\$121,054	\$121,085
Totals		\$1,654,978	\$1,438,392	\$1,478,482

Buildings are the biggest asset of both districts. While buildings owned by the districts might be incorporated directly into the new district, any buildings belonging to towns would not be, and their future relative to a new district would have to be determined. Southern Berkshire's debt for roof and boiler repairs to the Mount Everett building could become an obligation of the new district if the buildings are incorporated into the new district. While the Mount Everett building has been well-designed and maintained, the older Monument Mountain building is in quite poor condition at this point. A new high school building is a requirement, either for Berkshire Hills on its own, or if the eight towns merge their high schools. No existing building could house all 9th to 12th graders. If the towns want to negotiate a regional agreement, the design and debt obligations for this building should maximize benefits and minimize burdens for all towns, and a fair disposition for payments on the Mount Everett building should be determined as well.

One of the largest long-term obligations of each group of towns will be the pensions and benefits of employees who retired or will soon retire from the district. These can be identified and assigned, and carried as specific budget lines assessed to towns using the allocation rules of their original district.

A less obvious group of assets/obligations is existing contracts, ranging from purchased services or IT licenses, to the tuitions negotiated with neighboring elementary districts. Bargaining agreements with employees would have to be re-negotiated into single contracts, with no individual receiving less salary than they would have gotten under their current contract.

Baseline for financial modeling

As a baseline for the financial analysis of the models and scenarios, The Abrahams Group used local FY2021 budgets from each district and staffing lists to set up a financial workbook that allowed estimates to be easily made for a number of possibilities. This tool can be used in future discussions for more detailed modeling of their own proposals.

FY2021 expenses for both districts combined are presented in the table below by function:

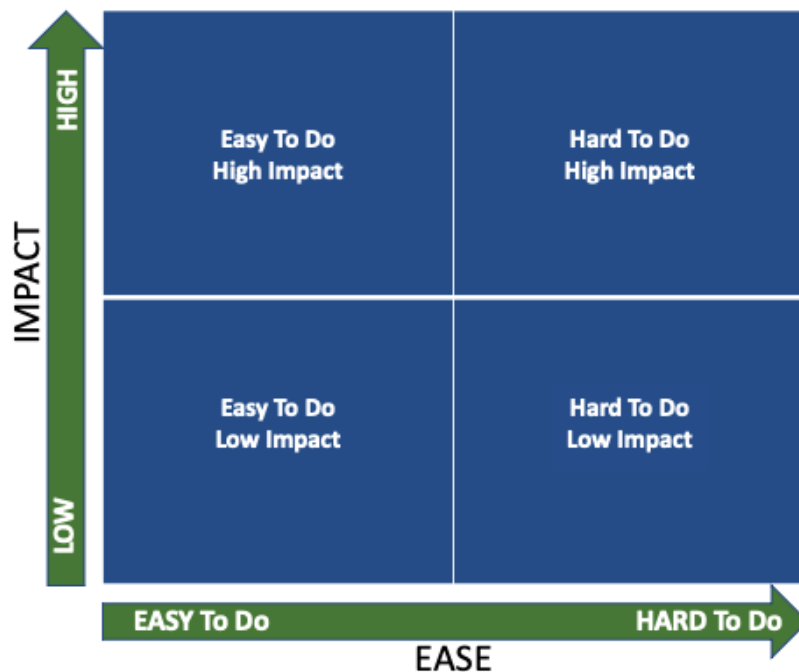
Total Expenses - Combined Districts - By Function					
Function			Totals		
Start	End	Description	Salaries	Non-Salaries	Grand Total
1110	1450	Administration	\$ 1,101,927	\$ 664,161	\$ 1,766,088
		Instruction			
2110	2250	Instructional Leadership	\$ 2,160,706	\$ 304,583	\$ 2,465,288
2305	2310	Teachers	\$11,728,746	\$ 16,051	\$ 11,744,797
2320	2345	Other Teaching Services	\$ 3,244,233	\$ 99,074	\$ 3,343,307
2351	2358	Professional Development	\$ 117,236	\$ 99,753	\$ 216,989
2410	2455	Instructional Materials, Equipment and Technology	\$ -	\$ 312,271	\$ 312,271
2710	2800	Guidance, Counseling and Testing	\$ 1,572,268	\$ 89,100	\$ 1,661,367
		Total Instruction	\$18,823,188	\$ 920,831	\$19,744,020
3100	3600	Pupil Services	\$ 820,121	\$ 3,384,555	\$ 4,204,676
4110	4450	Operations and Maintenance	\$ 1,552,853	\$ 2,096,494	\$ 3,649,347
5100	5200	Retirement, Health Insurance Active Employees	\$ -	\$ 7,188,350	\$ 7,188,350
5250	5990	Other Benefits and Fixed Charges	\$ -	\$ 2,432,194	\$ 2,432,194
6200	6900	Community Services	\$ -	\$ 127,901	\$ 127,901
7100	7600	Acquisition, Improvement and Replacement of Fixed Assets	\$ -	\$ 30,250	\$ 30,250
8100	8600	Debt Retirement and Service	\$ -	\$ 2,164,925	\$ 2,164,925
9100	9500	Programs with Other School Districts	\$ -	\$ 2,422,663	\$ 2,422,663
		Totals	\$22,298,089	\$21,432,325	\$43,730,414

After compiling the combined FY2021 expenses by function, as shown in the table above, expenses were further segregated by location, where possible. Once expenses by function and location were compiled, assumptions for recognizing duplicative positions and reduction of staffing levels to gain additional efficiencies could be discussed and documented, ultimately leading to calculations to determine estimated savings in the different models and scenarios to be presented in other sections of this report.

Models, Evaluation Introduction

We are using two evaluation methods to consider the various models and scenarios, 1) Ease-Impact and 2) Four Domains. Each is described below.

1. **Ease-Impact.** This methodology was used by BCETF in their Phase II study (led by the District Management Group) and is often used by organizations as a quick and relatively easy way to evaluate priorities related to strategic and improvement efforts.



Models/Scenarios will be considered and placed into the various quadrants to communicate, in a relatively simple/broad way, whether they are *more or less* desirable. In short, most desirable fall into the top right quadrant (easy to implement, high impact) and those least desirable fall into the bottom left quadrant (low impact, hard to implement).

2. **Four Domains.** The Team also examined each of the Models/Scenarios with four key domains that include, with a leading essential question:
 - a. Educational Quality: Does the solution lead to improved, equitable educational access, opportunities and outcomes?
 - b. Operational Efficiency: Does the solution lead to reduction in operational redundancies, greater system-wide alignment, and general operational efficiencies?
 - c. Finance: Does the solution reflect efficient, sustainable models that build economies of scale allowing for expanded/reinvestment of and equitable distribution of resources across the 8 Towns?
 - d. Feasibility: How realistic is the solution in terms of impact versus effort, politics, culture, legal/regulatory, readiness, desirability, incentives and disincentives?

The Team used these four domains, and a series of prompts (below) to individually and collectively evaluate the Models/Scenarios. Prompts, which may also be used by the RSDPB and future stakeholders as they weigh options, guided our consideration of the Models/Scenarios in each of the domains included:

Educational Quality. Does the model?

- Improve educational access, opportunity, and (potentially) outcomes for students?
- Offer ways to improve access, diversity, breadth and quality of education (programs, courses, activities, enrichment, and career pathways) for children across our two districts so they are fully prepared for college, career and life, whether here in the Berkshires or beyond?
- Lead to more consistent evaluation of program effectiveness through analysis, on a regular and ongoing basis, of student growth and achievement data using clearly identified and developmentally appropriate criteria?
- Result in the design and implementation of challenging, aligned, and coherent instructional programs and services (consistent with state and national standards) that are dedicated to the development of the whole child?
- Advance collaborations and new programming (e.g., expanded pre-K, career technical education, enrichment opportunities) and enhanced safety nets (e.g., counseling, social-emotional supports, special and alternative education) that support the unique needs of all children?
- Lead to more specialized and focused academic leadership, including the ability to focus a meaningful portion of one's work time on that specialization, e.g., mathematics, reading, Title I & Grants?
- Result in aligned curriculum across districts: curriculum is aligned vertically, horizontally and to state standards to facilitate within-district student transitions and cross-district school choice?
- Ensure access to high quality/rigorous education for all (including course rigor and availability and teacher expertise)?
- Increase arts, electives, AP, extracurricular offerings (including foreign languages) through shared courses/staff?
- Provide better access to more career pathway (vocational programs/technical skills) offerings at high school level?
- Align school schedules: to support shared staffing and distance learning?
- Create easier access to partnerships with third parties, e.g., colleges & universities, non-profits, collaboratives, vocational-technical schools?
- Result in more shared staff for electives and career pathways to increase breadth?
- Result in more shared resources for co-curricular activities to increase breadth of offerings?
- Result in additional supervision, professional development and coaching that is also more cost-effective?
- Increase job-alike collaboration for all staff, including support staff and specialists?
- Increase cohort size to expand offerings?
- Lead to additional student and educator access to effective technology tools and distance learning through a shared technology platform and support?
- Result in more equitable access to offerings?
- Expand out-of-school time (summer, vacation, after school) opportunities and experiences?
- Allow for the sharing of highly specialized staff to provide more effective student supports, e.g., ESL teacher, behavior interventionist, autism specialist?
- Increase cohort size to increase size of intervention and remediation groups with similar needs
- Lead to equitable access to safety net and supports?

- Improve access to unique services and programs for special education, English Language Learner, and alternative education students?
- Increase access to technology that is integrated with learning to prepare kids for the 21st century and beyond?
- Increase communication and collaboration with parents, families, local and state officials, and other community members to promote student achievement and development?
- Support and promotion of positive, nurturing, and safe learning environments in all classrooms and schools?

Operational Efficiency. Does the model?

- Allow for recruitment, retention, and development of highly qualified staff members, and regular evaluation of their ability to promote high-quality student learning and social/emotional development?
- Lead to greater efficiencies and services in district operations, staffing, and programming that offset current and expected demographic trends?
- Yield solutions that are based on collaborative rather than competitive advantage, and foster innovative approaches to rural education?
- Reflect age appropriate social and learning practices, such as transportation/travel time and the number of school/grade transitions?
- Result in more specialized, focused and efficient operations leadership e.g., human resources, transportation, finance?
- Control operational costs through collaboration/mergers that can be reinvested in direct services to students?
- Improve quality of operational services through dedicated staff, in effect, gaining more “Bang for the Buck” ?
- Consider transportation factors and travel time?
- Impact the ability to attract, retain, and develop talent (employees)?
- Consider current and future facilities use?

Fiscal Impact. Does the model?

- Finance schools in a way that stabilizes (or reduces) the burden on local taxpayers and/or leads to available funds for new educational investments that raise access and opportunities for students and staff?
- Create economies of scale (financial savings) through new collaborations and technologies?
- Manage responsibility for debt, current and future?
- Manage for legacy assets (OPEB, revolving funds, etc.)?
- Manage cohort and class size, leading to efficient use of human resources?
- Manage for future enrollment decline?
- Manage for school choice and tuition?
- Maximization of the allocation and expenditure of district funds, resources, and materials, and accurate monitoring of expenditures over time?

Feasibility. Does the model?

- Solve a worthwhile problem, with a significant enough effect to make it worth doing?
- Result in an inclusive, equitable school model that reflects local identity, is an ongoing point of pride for the eight towns, and serves to retain and attract residents and businesses in BHRSD/SBRSD as a place to live, learn, work, and play.
- Maintain and honor the unique identity of each eight town community, ensuring citizens remain fully connected and engaged with their schools?
- Consider the stakeholders required to implement, e.g., Town Meetings, Finance, Committees, School Committees, Select Boards?
- Deal with contractual, legal and regulatory requirements for implementation?
- Maintain local control over budget, curriculum, policy?
- Maintain local control over school closing and configuration?
- Sustain local ownership and engagement?
- Manage the district, e.g., budgeting and reporting, collective bargaining, school committee meetings, business and personnel operations?
- Maintain and promote a strong sense of pride and ownership for the community?
- Allow for sustainability, over time?
- Align with regional/district/stakeholder's readiness to act?
- Be achieved based on existing capacity contained in the region (districts, towns, stakeholders)?

Finally, the Team offers an additional way to think about the value proposition offered in each of the Models/Scenarios. The Project Manager developed an Opportunity Inventory for the SBEF work conducted in/around 2018, and modified it for the RSDPB effort. This tool could be used (with or without further modification) by members to consider the level of impact they expect in the various Models/Scenarios and value propositions. A snapshot of the tool is provided in Appendix I and can be found as a Google sheet [here](#). A sample snapshot is below.

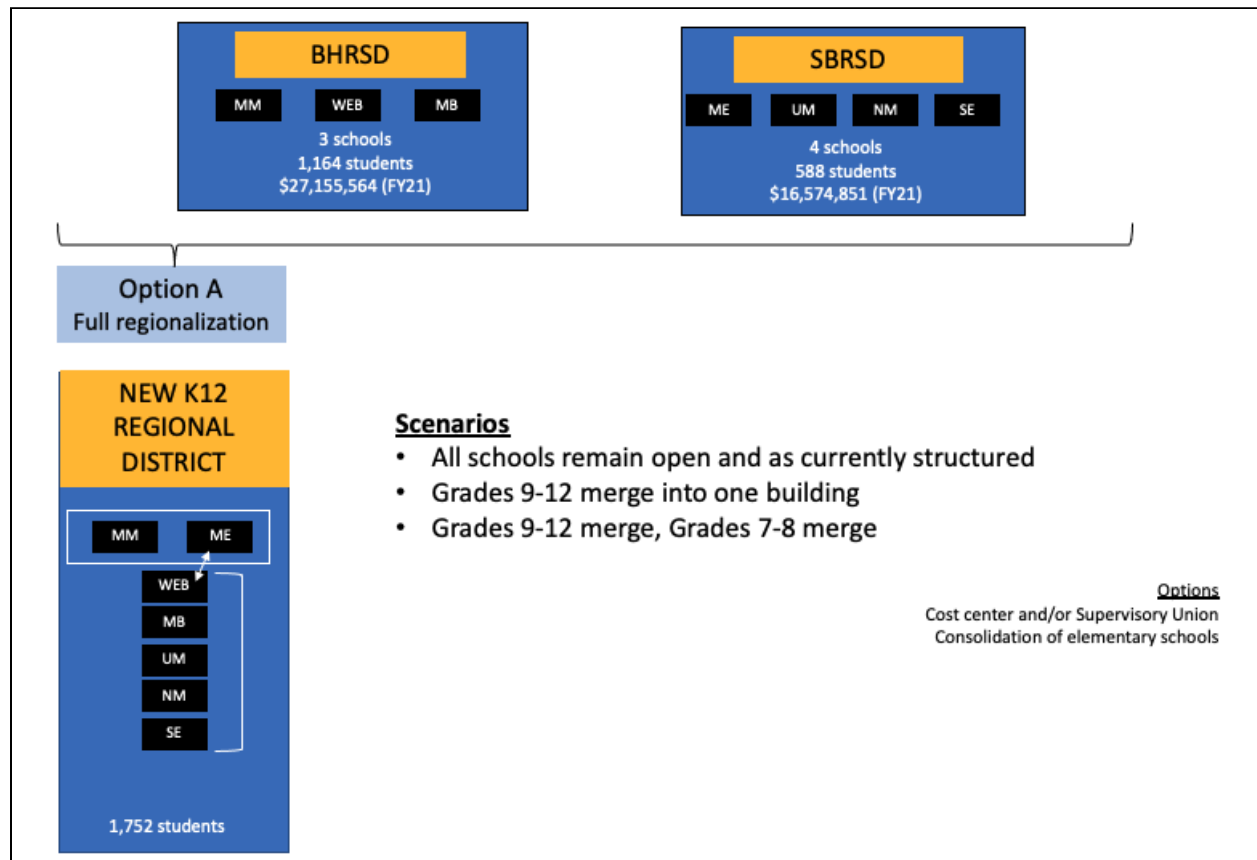
Modified by HJ Eberwein for RSDPB, March 2022 Originally created for SBEF, February 2018					
Opportunity Inventory					
"Why" Domain					
Goal	BHRSD	SBRSD	Importance (priority) Scale		
			High		Low
Increase educational opportunity, quality, access, and outcomes			5	4	3 2 1
Control financial impact to communities			5	4	3 2 1
Uniquely brand our (sub) region to increase residency/economic development			5	4	3 2 1
"Challenges" Domain					
Challenges/Considerations (General and specific)	BHRSD	SBRSD	Agreement (priority) Scale		
			Yes		No
Declining enrollment			5	4	3 2 1
Increasing costs			5	4	3 2 1
Access and Equity			5	4	3 2 1
Collective bargaining agreements cross district			5	4	3 2 1
Local control and governance consideration			5	4	3 2 1
Finance formulas and equity across towns/districts			5	4	3 2 1
Capital debt and future needs			5	4	3 2 1
Community identity			5	4	3 2 1
School buildings (potential closing and/or repurposes)			5	4	3 2 1
Staffing (reconfiguration and/or possible reduction)			5	4	3 2 1
Managing choice			5	4	3 2 1
Shifting needs			5	4	3 2 1
Constrained resources (flat state aid, limited local assessment/contribution)			5	4	3 2 1
Limited opportunities for students (as enrollment declines)			5	4	3 2 1
Limited capacity (for smaller districts) for support resources (specialists, organizational infrastructure such as HR, data/reporting, building management, etc.)			5	4	3 2 1
Limited access to range (breadth) of programs (arts, vocational, AP)			5	4	3 2 1
Staffing needs (high demand licenses, impending retirement wave)			5	4	3 2 1

"Opportunity" Domain						
Opportunities (Benefits)	BHRSD	SBRSD	Ease/Impact Scale			
			Ease/High			Ease/Low
Shared IT systems (learning, student management, data, storage/records)			5	4	3 2 1	Ease/Impact
General IT/computer technology management (hardware, software, staffing, tech support, training)			5	4	3 2 1	Ease/Impact
Shared purchasing (joint accounting - increase in areas such as books)			5	4	3 2 1	Ease/Impact
Shared professional development (limited capacity by grade/area/content area)			5	4	3 2 1	Ease/Impact
Shared curriculum development (text, programs, instructional systems), Curriculum alignment			5	4	3 2 1	Ease/Impact
Shared assessment systems			5	4	3 2 1	Ease/Impact
Joint specialized programs (special education)			5	4	3 2 1	Ease/Impact
Joint specialized programs (vocational education)			5	4	3 2 1	Ease/Impact
Joint specialized programs (alternative education)			5	4	3 2 1	Ease/Impact
Joint specialized programs (vocational)			5	4	3 2 1	Ease/Impact
Access to shared course work for students 9-12 in areas where enrollment is low, such as AP/IB and related education			5	4	3 2 1	Ease/Impact
Access to shared course work for students 9-12 in areas where enrollment is low, such as AP/IB and related education			5	4	3 2 1	Ease/Impact
Access to shared course work for students 9-12 in areas where enrollment is low, such as AP/IB and related education			5	4	3 2 1	Ease/Impact
Shared/online courses - developing a shared learning management system			5	4	3 2 1	Ease/Impact
Shared/online courses in concert with MCLAS/CC/MS/HS			5	4	3 2 1	Ease/Impact
Organization of education/career pathways, connecting activities (connection to local employers), Career Awareness, Exploration, and Immersion (internships) activities - Community work connection, innovations related to career options			5	4	3 2 1	Ease/Impact

A review of the models and scenarios follows in the next section.

Model A

Model A: Full Regionalization is illustrated in the schematic below.



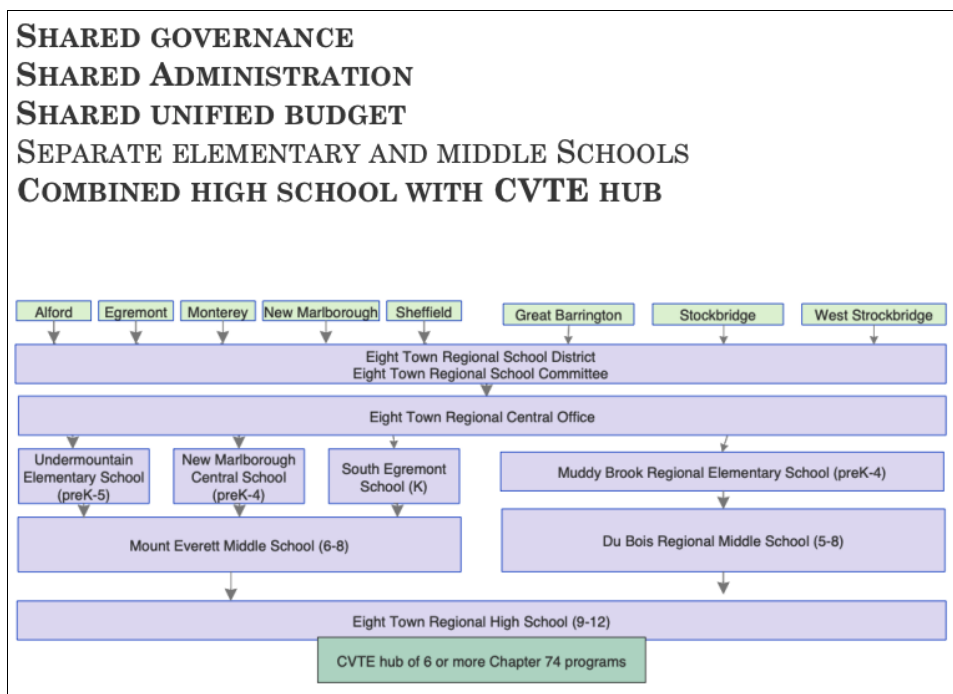
In the earlier section, we explored regionalization, which is the formation of a single district supported by two or more towns. Model A is the formation of a single K-12 Regional School District that includes all 8 towns. Under Model A, we are proposing three scenarios towards the formation of this single K-12 regional district, as follows:

Scenario 1. K-12 region formed, all schools remain open and as currently structured. This would involve no changes to current buildings. Students continue to attend their home schools. Central office is consolidated as are operational functions such as facilities, IT, food service.

Scenario 2. K-12 region formed, grades 9-12 merge into a single building. Students at Mt. Everett (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Elementary schools would remain as is.

Scenario 3. K-12 region formed, grades 9-12 merge, & Grades 7-8 merge. Students at Mt. Everett (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Grades 7-8 would attend W.E.B. DuBois and Mt. Everett Grade 6 would be moved to Undermountain, Mt. Everett would be closed for repurposing. All other elementary schools remain as is.

Full Regionalization is one of the three broad models in consideration by the RSDPB. While the formation of a region presents significant challenges (as outlined in the previous section), generally, existing educational and organizational structures come into alignment and are more coherent when regions form.



The following overlapping functions can be aligned and centralized under a single organizational structure:

- The work of school committees (with various subcommittees)
- Central Office
- Information Technology and Systems (Back Office, HR, Transportations, Sped, etc.)
- Negotiations and management of bargaining units (contracts, organizational structures)
- Educational systems (calendar, curriculum, assessment, professional development, etc.)

The three K-12 regionalization scenarios will be examined below.

Model A: Full Regionalization Scenarios, Summary

Model A Scenarios 1, 2 and 3 are further detailed below. Key elements that identify the number of districts, schools, central office/admin, impact to students, impact to staff, impact to governance, and impact to transportation, are noted. All scenarios reduce the number of districts and central office/admin teams from two to one. Two scenarios result in the continuation of 7 schools as is, while Scenario 3 reduces the number of schools to 6 by closing Mt. Everett.

Impact to staff will include consolidation of central office/admin/central operations staff in Scenario 1, consolidation of grades 9-12 teachers (high school) in Scenario 2, and consolidation of grades 9-12 (high school) and 7-8 (upper middle) in Scenario 3. Impact on students will be limited in Scenario 1, with the

exception of students who participate in cross-district programming. Scenario 2 will result in grades 9-12 students at Mt. Everett attending school in the new high school on the Great Barrington campus.

Scenario 3 will also result in grades 9-12 students at Mt. Everett attending school in the new high school on the Great Barrington campus, plus grade 7-8 students attending school at W.E.B DuBois. Grade 6 students will attend school at Undermountain. Finally, transportation is not likely to cost any more, except if both high schools remain open (Scenario 1) and student exchanges (shared programming) via shuttle bus occur. Otherwise, costs will remain as is, with travel times longer for some students (those homes further away from the GB campus) and shorter for others (those homes closer to the GB campus). As stated, no student would ride the bus for more than one hour.

Model A. Full Regionalization (K-12)	SCENARIO 1	SCENARIO 2	SCENARIO 3
	All schools remain open and as currently structured Students continue to attend their home schools. Central office is consolidated as are operational functions such as facilities, IT, food service.	Grades 9-12 merge Students at Mt. Everett (9-12) attend combined high school on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Elementary schools remain as is.	Grades 9-12 merge, & Grades 7-8 merge Students at Mt. Everett (9-12) attend combined high school on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Grades 7-8 attend W.E.B. DuBois and Mt. Everett Grade 6 attends Undermountain, Mt. Everett is closed for repurposing. Elementary schools remain as is.
Number of Districts	1 District	1 District	1 District
Number of Schools	7 schools	7 schools	6 schools
Number of Central Office/Admin	1 Central Office/Admin team	1 Central Office/Admin team	1 Central Office/Admin team
Students	No change, all students attend same school as is. S Some may attend cross-school programming.	9-12 school students attend at new high school in GB. All other students attend school as is.	9-12 school students attend at new high school in GB. 7-8 students attend at W.E.B DuBois. All other students attend school as is.
Staff	Central office and operation can consolidate. School staff remain as is.	Central office and operation can consolidate. High school staff consolidate in new school. All other school staff remain as is.	Central office and operation can consolidate. High school staff consolidate in new school. All other school staff remain as is.
Governance	One school committee.	One school committee.	One school committee.
Transportation	Mostly, as is. Some additional transportation associated with cross-school programming	Cost equivalent to current. No change to K-8 schools. For high school, ride times will increase for some students and drop for others. Bus ride limits (HS) one hour.	Cost equivalent to current. No change to K-6 schools. For high school/middle school ride times will increase for some students and drop for others. Bus ride limits (HS & MS) one hour.

Model A: Full Regionalization Scenarios, Recommendations

Scenario 1. All schools remain open and as currently structured.

We do not recommend Scenario 1 as an optimal solution

Yes. Forming a K-12 region would offer an opportunity for centralized operational and systems alignment, coherence, and efficiencies while retaining the existing school structures. School level identities would be protected.

No. In retaining all schools as is, the breadth of educational opportunities, efficiencies in staffing through class size balancing, expansion of a professional culture, and construction/renovation of a “right-size” high school would be missed. Governance would be impacted.

Opportunity: The formation of a K-12 region is a bold step for the 8 towns and will lead to both efficiencies and expanded educational opportunities for students. However, lacking school mergers (particularly at the high school), the full effect will not be realized and will lead to the question of whether the impact is worth the effort.

Scenario 2. Grades 9-12 merge and become a region

We recommend Scenario 2 as an optimal solution

Yes. Forming a K-12 region offers an opportunity for centralized operational systems alignment, coherence, and efficiencies while retaining existing school facilities. The current high school construction project offers a unique opportunity to build an 8-town grades 9-12 vision that would include a contemporary educational facility with CVTE and additional programming derived through merger savings. Elementary and middle schools would remain as is.

No. The consolidation of two high schools into a single entity will be difficult given school histories and identities. Retaining middle/elementary schools *as is* limits the breadth of educational opportunities, efficiencies in staffing through class size balancing, and full expansion of a professional culture. Governance would be impacted.

Opportunity: The formation of a K-12 region and combined new, single high school (grades 9-12) is a bold step for the 8 towns and will lead to both efficiencies and expanded educational opportunities for high school students. We believe this project may provide the inspiration, the opportunity to come together as an 8-town collective, and a value proposition that serves as the foundation for an 8-town regionalization process.

Scenario 3. Grades 9-12 merge and Grades 7-8 merge

We do not recommend Scenario 3 as an optimal solution

Yes. Forming a K-12 region offers an opportunity for centralized operational systems, alignment, coherence, and efficiencies while retaining existing school structures. The current high school construction project offers a unique opportunity to build an 8-town grades 9-12 vision that would include a contemporary educational facility with CVTE and new programming derived

through merger savings. Adding grades 7 & 8 expands and allows for a coherent and aligned 7-12 program on a single campus that ensures access to academic, vocational, and enrichment experiences - generating additional efficiencies. Elementary schools would remain as is.

No. While this Scenario may offer the most aggressive model for fiscal savings and educational program alignment, we believe the need for further discussion pertaining to middle school programs and philosophies is necessary. Moreover, the full closure of Mt. Everett will create additional challenges in use and repurposing. Governance would be impacted.

Opportunity: The formation of a K-12 region and combined new, single high school, and moving all grades 7-8 to W.E.B. DuBois would be the most ambitious step for the 8 towns to take (barring action on further consolidation of elementary schools). While it will lead to the most significant operational and fiscal efficiencies and expanded educational opportunities for students in grades 7-12, moving grades 7-8 should be held for further planning and future consideration.

Evaluation, Model A

The evaluation grid (above) is a synthesized summary applying the evaluation criteria. These are described, briefly, below:

	Scenario 1	Scenario 2	Scenario 3
EASE-IMPACT MATRIX			
EASE	Hard to do	Hard to do	Hard to do
IMPACT	Moderate to High	High	Highest
FOUR DOMAINS			
EDUCATIONAL QUALITY	Moderate	High	High
OPERATIONAL EFFICIENCY	Moderate to High	High	High
FINANCE	Moderate	High	High
FEASIBILITY	Moderate	Moderate	Low

Scenario 1. All schools remain open and as currently structured

1. Ease-Impact.

- **Ease:** Hard. We believe that the potential to form a new K12 regional will be very challenging, but not impossible, to do.
- **Impact:** Moderate-High. If a single K-12 regional district was formed, it could offer a moderate to high impact for the 8 towns through alignment of administrative, educational and operational systems.

2. Four Domains.

- **Educational Quality:** Moderate, brings systems into alignment, but does not make available all educational opportunities, particularly at the high school level.
- **Operational Efficiency:** Moderate to high, centralizes administration and operations, bringing them into alignment.
- **Finance:** Moderate, without class size balancing, full savings are not realized.

- Feasibility: Low to Moderate, this will be challenging to do and the value proposition may not be significant enough to compel action.

Scenario 2. Grades 9-12 merge

1. Ease-Impact.

- Ease: Hard. We believe that the potential to form a new K12 regional will be very challenging, but not impossible, to do.
- Impact: High. If a single K-12 regional district was formed, with a shared high school, it would offer alignment of administrative, educational and operational systems, and expanded educational opportunities for grades 9-12.

2. Four Domains.

- Educational Quality: High. Expands programming (CVTE, electives, advanced, courses, enrichment) for grades 9-12 students.
- Operational Efficiency: High. Centralizes administration and operations, bringing them into alignment, one high school campus in GB.
- Finance: High. Class size balancing leads to savings and potential for reinvestment.
- Feasibility: Moderate. This will be challenging to do in seeking buy-in from all 8 towns. New high school and shared planning/visioning could offer incentive towards shared ownership and common culture/identity.

Scenario 3. Grades 9-12 merge, & Grades 7-8 merge

1. Ease-Impact.

- Ease: Hard. We believe that the potential to form a new K-12 regional will be very challenging, but not impossible, to do. Adding consolidation of grades 9-12 and 7-8 further complicates the prospects given it demands a plan for Mt. Everett.
- Impact: High. If a single K-12 regional district was formed, with a shared high school and shared 7-8, it would offer alignment of administrative, educational and operational systems, and expanded and aligned educational opportunities for grades 7-12.

2. Four Domains.

- Educational Quality: High. Expands programming (CVTE, electives, advanced, courses, enrichment) for grades 9-12 students, provides grades 7-8 alignment to the high school including courses, enrichment, and pre-vocational.
- Operational Efficiency: High. Centralizes administration and operations, bringing them into alignment, one high school campus in GB. Could lead to repurposing Mt. Everett for alternative uses such as adult, alternative, or special education
- Finance: High. Class size balancing (7-12) leads to savings and potential for reinvestment.
- Feasibility: Low. This will be challenging to do in seeking buy-in from all 8 towns, given the potential closure of Mt. Everett. Construction of a new high school and shared planning/visioning process could offer incentive for shared ownership/culture.

Summarized, the ease and feasibility of launching a K12 regional district will be a challenge in any of the three scenarios. However, it also offers high potential for operational efficiencies and alignment, educational programming and access, and fiscal savings that can be reinvested. Moreover, it offers the 8-towns a process for creating something together (a high school) through a unifying process

Advantages and Disadvantages/Discussion, Model A Scenarios

Scenario 1		Scenario 2		Scenario 3	
ADVANTAGES & DISADVANTAGES					
ADVANTAGES	Alignment of Central Office and Operations	Construction of new high school with CVTE hub, right sized with expanded academic, career, and extra-curricular opportunities	Construction of new high school with CVTE hub, right sized with expanded academic, career, and extra-curricular opportunities		
	Alignment of Teaching, Learning, Assessment, and Student Services	MSBA reimbursement for regionalization	Alignment of grades 7 & 8 with high school (teaching & learning, career, and academic pathways)		
	Expanded Professional Culture – PD	Expanded Professional Culture – PD	MSBA reimbursement for regionalization		
	Fiscal savings for reinvestment	Class size/cohort balancing, savings for reinvestment	Expanded Professional Culture – PD		
	Aligned calendars, contracts, IT systems	Aligned calendars, contracts, IT systems	Class size/cohort balancing, savings for reinvestment		
	No changes to current schools.	No changes to elementary/middle schools	Aligned calendars, contracts, IT systems		
DISADVANTAGES	Operation of two high schools with limited access to programming	Movement of Mt. Everett students to GB campus and integration of high schools into single school	Closure of Mt. Everett will be difficult for the SBRSD community		
	Missed opportunity to right size the high school with CVTE programs	Regionalization process will be difficult	Movement of grade 6 to Undermountain will change the current SBRSD model		
	No class size/cohort balancing, Limited savings	Reduction of sports teams, drama programs, etc.	Repurposing of Mt. Everett, management of existing debt, costs associated with new school		
	Governance spread across 8 towns, one committee	Governance spread across 8 towns, one committee	Reduction of sports teams, drama programs, etc.		
	Regionalization process will be difficult	Slightly increased class size	Governance spread across 8 towns, one committee		
		Managing existing debt, costs associated with the new school	Slightly increased class size		

The grid above captures the most significant advantages and disadvantages the Model A scenarios present. A discussion follows:

Discussion.

Regionalization, Generally

Yes.

Regionalization, as outlined in the previous section, is the process by which two or more towns form a combined, regional district. Currently, both BHRSD and SBRSD are regional districts, thus the process of combining two regional K-12 districts, according to our sources at DESE, would be the first of its kind. Thus, it comes with significant challenges and barriers, yet high potential reward.

There remain questions of size, namely the optimally sized district that leads to both guaranteed student experiences (high quality education) and fiscal controls. A number of studies, captured in the historical review and cited literature, speak to the lessons learned from prior regionalization efforts in the Berkshires, across the Commonwealth, and across the nation.

A full list of advantages can be found in the Regionalization section of this brief, a sample includes:

- A single school committee with cohesive educational policy for all K-12 students
- A single administration with potential for more efficient and economical operation of school departments
- A coordinated curriculum, kindergarten through grade twelve
- Expanded curricular offerings due to fiscal efficiencies to serve an increased number of students from combined enrollments, leading to educational improvements
- Opportunity to redirect leadership time and energy to educational programs through a reduction of duplicative efforts in, for example, business procedures, reporting, compliance, and negotiations
- Aligned schedules, calendars and association contracts
- Expansion of professional culture with greater capacity for talent development including recruitment, orientation and mentoring, and aligned professional development
- Greater cultural diversity through larger student cohort
- The ability to adjust out-of-district tuition payments (non-member districts) to reflect closer-to-actual per pupil spending

No.

A full list of disadvantages can be found in the Regionalization section of this brief, a sample includes:

- Differences in educational goals and objectives
- Real or perceived social and identity differences
- Unwillingness to share control with neighboring towns
- Potential for closing town school buildings; the misconception that regionalization always entails the closing of school buildings
- Concern for job security and impact on teacher salaries, benefits and professional status
- Disparities in per-pupil spending between districts
- Feared loss of focus on elementary education
- Fear there will be larger schools and larger class sizes
- Fair assessments across member towns and assignment of legacy finances (capital, OPEB, etc.)

Below, each a summary of advantages and disadvantages of each Scenario is described.

Scenario 1. All schools remain open and as currently structured

This Scenario proposes no changes to the current buildings. Students would continue to attend their home schools. Central office is consolidated including operational functions such as facilities, IT, and food service in a single region.

Yes.

There are a number of benefits that can be realized through Scenario 1. The act of regionalization, itself, has the potential to generate efficiencies, build coherence and alignment across the 8 towns, and advance educational programming and opportunities for students.

- Results in the alignment of central office functions that would create efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example
- Allows for the alignment of curriculum, a teaching and learning system, assessment and data systems, and professional development
- Aligns systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools
- Combines talent/human resources systems including recruitment, licensure support, orientation, and mentoring
- Generates savings that can be invested back into the system or used to offset fiscal liability to the towns
- Has no impact on current school identity and cultures, rather a new district affiliation will be launched
- Allows for shared specialization staffing in areas such as special education, SEL counseling, English language learners, curriculum, and alternative education
- Allows for coordination of early childhood, out-of-school time, and summer programming
- Keeps all schools as is, avoiding political challenges to mergers/consolidation

No.

There are a number of challenges or drawbacks associated with Scenario 1.

- Reduces the number of school committees, impacting (perceived or real) local control as representation is spread across 8 towns
- Maintains the existing seven schools, thus full efficiencies are not realized through class size balancing
- Maintains two high schools, missing the opportunity to jointly participate in the construction of a contemporary state-of-the-art facility that reflects broad educational programs and services - including a CVTE hub
- Unlikely that, without a high school merger, MSBA regionalization incentive will be realized in order to “right size” the new facility for enrollment, programs, and services
- Potential continued out-migration from SBRSD (Mt. Everett) to BHRSD (Monument) if schools remain separate and Monument is fully reconstructed
- Regionalization will be difficult and will require coordination of 8-towns

Scenario 2. Grades 9-12 merge

Scenario 2 proposes that high schools merge, Mt. Everett and Monument (9-12) students attend a newly constructed high school (to be named) on the Great Barrington campus. High school programs and staff are merged, with additional Chapter 74, approved CVTE programs (6-8) constructed. Central office is consolidated including operational functions such as facilities, IT, and food service in a single region. Elementary schools remain as is.

Yes.

There are a number of benefits that can be realized through Scenario 2. The act of regionalization, itself, has the potential to generate efficiencies, with additional efficiencies, coherence, and alignment created by combining grades 9-12 into a single building (newly constructed on the Great Barrington campus).

- Results in the alignment of central office functions that would create efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example
- Allows for the alignment of curriculum, a teaching and learning system, assessment and data systems, and professional development
- Aligns systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools
- Combines talent/human resources systems including recruitment, licensure support, orientation, and mentoring
- Generates higher savings through class size management (grades 9-12) that can be invested back into the system or to offset fiscal liability to the towns
- Allows for shared specialization staffing in areas such as special education, counseling, English language learners, and alternative education
- Results in a contemporary state-of-the-art high school facility that reflects broad educational programs, services, pathways and 6-8 high quality, approved CVTE programs
- Potentially allows for MSBA incentive towards new construction through regionalization incentive
- High school professional culture is expanded
- Eliminates competition between high school for students
- Allows for coordination of early childhood, out-of-school time, and summer programming
- Keeps elementary and middle schools as is

No.

There are a number of challenges or drawbacks associated with Scenario 2.

- Reduces the number of school committees, impacting (perceived or real) local control as representation is spread across 8 towns
- Maintains the existing seven school facilities, thus full efficiencies are not realized operationally, or through full class size balancing outside of grades 9-12
- Current staff from SBRSD grades 9-12 will be relocated to the new high school and schedules that currently allow 7-12 assignments will be limited to 9-12
- Impacts school identities with two high schools merged into one
- Financing for the new high school and existing school debt will need to be fairly managed and may be perceived as a drawback

- Class sizes will increase (based on modeling parameters)
- May result in (some) reduction of co-curricular affiliations such as sports teams, drama programs, bands - recognizing that enrollment in some of these may be currently challenged
- Regionalization will be difficult and require coordination of 8-towns

Scenario 3. Grades 9-12 merge & Grades 7-8 merge

Scenario 3 proposes that high schools merge, Mt. Everett and Monument (9-12) students attend a newly constructed high school on the Great Barrington campus. High school programs and staff are merged, with additional CVTE programs (6-8) constructed. Mt. Everett grades 7-8 students attend W.E.B. DuBois and Mt. Everett Grade 6 students attend Undermountain. Mt. Everett is closed for repurposing. Central office is consolidated including operational functions such as facilities, IT, and food service in a single region. Elementary schools remain as is.

Yes.

There are a number of benefits that can be realized through Scenario 3. The act of regionalization, itself, has the potential to generate efficiencies, with additional efficiencies, coherence, and alignment created by combining grades 9-12 and grades 7-8 into a single building (newly constructed on the Great Barrington campus). Moreover, the closing of Mt. Everett offers opportunities for savings and potential repurposing for other uses.

- Results in the alignment of central office functions that would create efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example
- Allows for the alignment of curriculum, a teaching and learning system, assessment and data systems, and professional development
- Aligns systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools
- Combines talent/human resources systems including recruitment, licensure support, orientation, and mentoring
- Generates higher savings through class size management (grades 9-12 and 7-8) that can be invested back into the system or to offset fiscal liability to the towns
- Allows for shared specialization staffing in areas such as special education, counseling, English language learners, and alternative education
- Results in a contemporary state-of-the-art high school facility that reflects broad educational programs, services, pathways and 6-8 high quality CVTE programs
- Aligns grades 7-8 with the high school on a single campus to ensure that students have access to a breadth of curriculum, pre-career/CVTE opportunities, and enrichment experiences
- Allows grades 7-12 teachers to move between buildings (as needed) on a single campus
- Potentially allows for application of MSBA incentive to new construction through regionalization incentive
- Grades 7-12 professional culture is expanded
- Allows for coordination of early childhood, out-of-school time, and summer programming
- Keeps elementary schools as is
- Avoids competition for students in grades 7-12 students
- Allows for closing of Mt. Everett, which yields operations savings and positions the facility for repurposing

No.

There are a number of challenges or drawbacks associated with Scenario 3.

- Reduces the number of school committees, impacting (perceived or real) local control as representation is spread across 8 towns
- Results in the closure of Mt. Everett, which will be a significant concern for SBRSD
- Middle school models are different, and this will require significant coordination across the schools and grade spans
- Current staff from SBRSD grades 7-12 will be relocated to the new high school and/or W.E.B DuBois
- Financing for the new high school and existing school debt will need to be fairly managed and may be perceived as a drawback
- Class sizes will increase (based on modeling parameters)
- May result in reduction of co-curricular affiliations such as sports teams, drama programs, bands - recognizing that enrollment in some of these may be currently challenged
- Regionalization will be difficult and require coordination of 8-towns

Opportunities, Model A Scenarios

A number of potential opportunities exist in the three Model A Scenarios. These have been referenced in both the regionalization section and in the descriptions above. Below is a synthesis of potential opportunities. This list is not exhaustive, but begins to identify how potential opportunities apply to each of the various scenarios.

As is evident, the more aggressive Scenario 3 offers the greatest value in terms of fiscal savings, potential opportunities for reinvestment, and both operational and educational possibilities. Still, all three regionalization scenarios do offer significant potential for a K-12 operational and educational alignment and coherence that, even with separate buildings, can be shaped over time under a single central administrative and operational structure.

Model A.			
Full Regionalization (K-12)	SCENARIO 1	SCENARIO 2	SCENARIO 3
	All schools remain open and as currently structured	Grade 9-12 merge	Grades 9-12 merge, & Grades 7-8 merge
Savings through class size balancing that can be used to reinvest in educational programming and/or manage fiscal liability to the towns	NO	YES	YES+
Centralized Operations (Facilities, Food, Purchasing) leading to efficiencies and specialization in role type	YES	YES	YES
Coordinated curriculum K-12	YES	YES	YES+
Expanded curriculum offerings		YES	YES+
Aligned IT systems (purchasing, student management, student learning, storage & records, data, reporting)	YES	YES	YES
Aligned purchasing	YES	YES	YES
Expanded professional development	LIMITED	YES	YES
Talent development (recruiting, orientation, mentoring)	YES	YES	YES
Assessment systems	YES	YES	YES
Specialized programming that addresses student need (special education, alternative education, ELL, SEL)	YES	YES	YES+
CVTE Programming (6-8) approved Chapter 74 programs, aligned with workforce needs	NO	YES	YES
Expanded high school (grades 9-12) courses and programs	NO	YES	YES
Gifted and Talented	LIMITED	POSSIBLE	POSSIBLE
Dual enrollment and virtual courses	LIMITED	YES	YES
Coordinated career development education grades 7-12	LIMITED	LIMITED	YES
Refined school-to-career pathways	LIMITED	YES	YES
Expanded Advanced Placement courses	LIMITED	YES	YES
Consistent and universal early education (standards, dosage)	YES	YES	YES
Expanded Out-of-School Time (OST) programming	YES	YES	YES
Coordination with community partners (agencies and organization), consistently	YES	YES	YES
Family outreach, communication, and support	YES	YES	YES
Grant writing – access to external funds to support efforts and initiatives	YES	YES	YES
Compliance training and functions standardized	YES	YES	YES
Expansion of professional culture including networks, role type, and professional develop related to content and grade span	LIMITED	YES	YES
Capacity to explore and expand (across the region) emerging models such as collaborative care, innovative pedagogies, portrait (skills and competencies), etc.	YES	YES	YES
Access to co-curricular programming (clubs and activities)	YES	YES	YES
Program evaluation and organizational research	YES	YES	YES
Access to and application of IT for students and staff	YES	YES	YES
Middle school, prevocational and career development, and exploration	LIMITED	LIMITED	YES
Adult programming and training	NO	YES	YES
Expanded transportation for OST experiences	LIMITED	YES	YES
Common and team planning time for staff	YES	YES	YES+
Expanded exposure to cultural diversity through larger cohorts and experiences (travel, exchanges, study)	LIMITED	YES	YES
A system-wide cohort of instructional coaches and interventionist, trained and strategically assigned	LIMITED	YES	YES

Model A: Fiscal Analysis

Scenario 1. K-12 region formed, all schools remain open and as currently structured. This would involve no changes to current buildings. Students continue to attend their home schools. Central office is consolidated as are operational functions such as facilities, IT, and food service.

Fiscal Assumptions: With a combined central office and district, certain positions, like those associated with the School Committee, the Superintendent's Office, and districtwide operations, should not be duplicated. With elimination of duplicative positions and a combined district, certain remaining staff that take on additional responsibilities because of their expanded role in the new district see a negotiated increase in compensation. School Choice amounts are based on FY2021 data showing that 114 SBRSD students went to BHRSD and 47 BHRSD students went to SBRSD, at a cost of approximately \$5,000 per student. The changes to School Choice revenues and expenses equal and net to \$0.

Scenario 2. K-12 region formed, grades 9-12 merge into a single building. Students at Mt. Everett (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Middle and elementary schools would remain as is.

Fiscal Assumptions: In addition to the assumptions for Scenario 1, with one less high school in operation and consolidation of high school resources, staffing levels at the high school level can be reduced to gain additional efficiencies. Estimated staffing impact and savings for this scenario are presented as a range, with the low end of the range showing savings based on 20 students per classroom and an average teachers' salary of \$50,000 and the high end of the range showing savings based on 22 students per classroom and an average teachers' salary of \$70,000. Strong investment in CVTE programming is included under this scenario.

Scenario 3. K-12 region formed, grades 9-12 merge, & Grades 7-8 merge. Students at Mt. Everett (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Grades 7-8 would attend W.E.B. DuBois and Mt. Everett Grade 6 would be moved to Undermountain, Mt. Everett would be closed for repurposing. All other elementary schools remain as is.

Fiscal Assumptions: In addition to the assumptions for Scenario 1 and Scenario 2, with one less school in operation and consolidation of resources for grades 7 & 8, staffing levels for grades 7 & 8 level can be reduced to gain additional efficiencies. Estimated staffing impact and savings for this scenario are presented as a range, with the low end of the range showing savings based on 20 students per classroom and an average teachers' salary of \$50,000 and the high end of the range showing savings based on 22 students per classroom and an average teachers' salary of \$70,000. Strong investment in CVTE programming is included under this scenario.

FISCAL AND STAFFING IMPACT										
	Scenario 1		Scenario 2				Scenario 3			
			Low end of range		High end of range		Low end of range		High end of range	
			20 per class \$50K avg salary		22 per class \$70K avg salary		20 per class \$50K avg salary		22 per class \$70K avg salary	
School choice	\$		\$		\$		\$		\$	
Revenues	\$ (805,000)		\$ (805,000)		\$ (805,000)		\$ (805,000)		\$ (805,000)	
Expenses	\$ (805,000)		\$ (805,000)		\$ (805,000)		\$ (805,000)		\$ (805,000)	
Net school choice \$ impact	--		--		--		--		--	
Other expenses	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%
Central office/admin	\$(452,531)		\$(452,531)		\$(452,531)		\$(452,531)		\$(452,531)	
Districtwide	\$(597,658)		\$(525,258)		\$(525,258)		\$(525,258)		\$(525,258)	
HS/7th-8th			\$(525,935)		\$(1,092,935)		\$(1,361,404)		\$(2,071,504)	
Total savings	\$(1,050,190)	-2.4%	\$(1,503,725)	-3.4%	\$(2,070,725)	-4.7%	\$(2,339,193)	-5.3%	\$(3,049,293)	-7.0%
Staffing (FTE)	-6.8	-1.7%	-14.8	-3.7%	-16.8	-4.2%	-24.6	-6.2%	-27.6	-6.9%

- The Total Savings line shows estimated savings in dollars and percentage when compared to total FY 2021 spending for both districts of \$43,730,414.
- The Staffing (in FTE) line shows estimated staffing changes in FTE and percentage when compared to FY 2021 staffing levels for both districts of 397.5 FTE.

Results:

Scenario 1

If BHRSD and SBRSD were to fully regionalize and keep all schools in operation as they are today, due to duplicative central office/administrative and districtwide positions, the districts can anticipate an estimated reduction in staff from current staffing levels of 6.8 FTE (or 1.7%), resulting in estimated savings of \$1,050,190 (or 2.4%) of the districts' combined expenses.

Scenario 2.

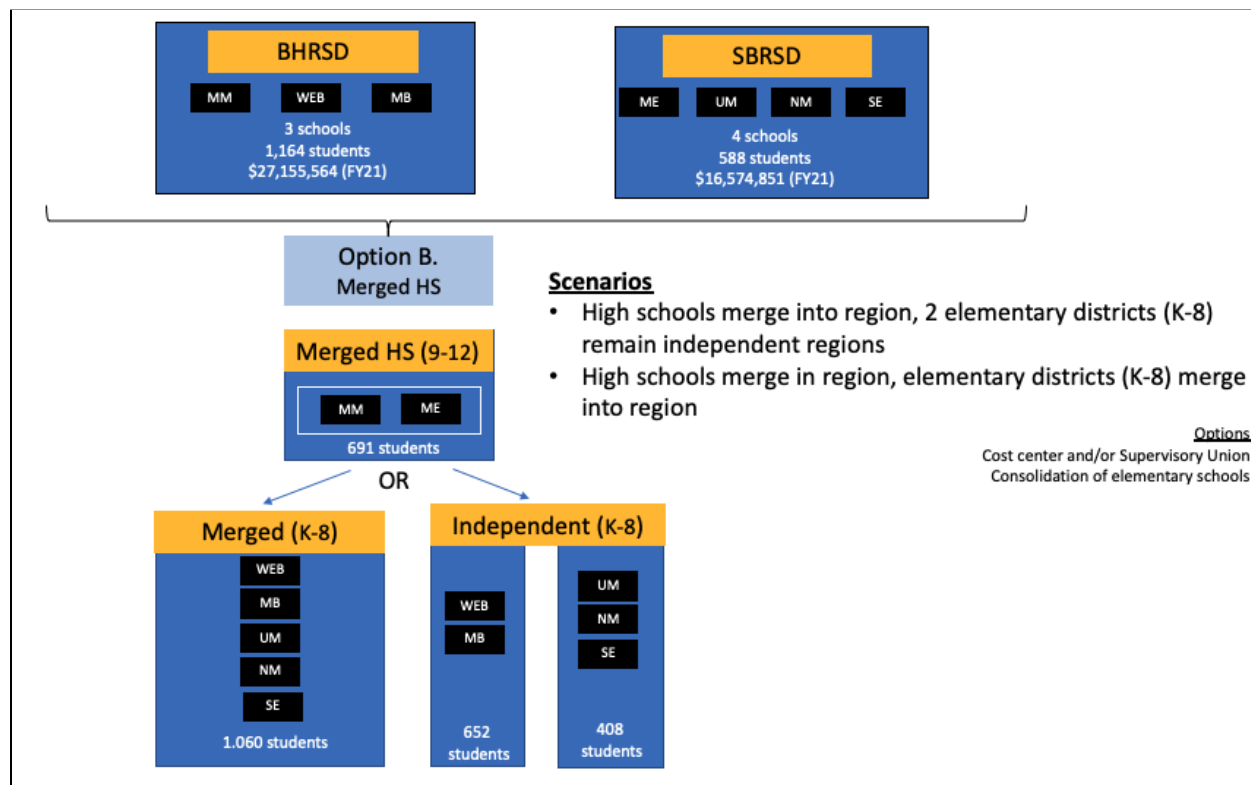
If BHRSD and SBRSD were to fully regionalize, combine high schools, and keep all other schools in operation as they are today, due to duplicative central office/administrative, districtwide, teaching, and other positions, the districts can anticipate an estimated reduction in staff from current staffing levels ranging from 14.8 FTE (or 3.7%) to 16.8 FTE (or 4.2%), resulting in estimated savings of the districts' combined expenses ranging from \$1,503,725 (or 3.4%) to \$2,070,725 (or 4.7%).

Scenario 3.

If BHRSD and SBRSD were to fully regionalize, combine high schools, combine grades 7 & 8, and keep all other schools in operation as they are today, due to duplicative central office/administrative, districtwide, teaching, and other positions, the districts can anticipate an estimated reduction in staff from current staffing levels ranging from 24.6 FTE (or 6.2%) to 27.6 FTE (or 6.9%), resulting in estimated savings of the districts' combined expenses ranging from \$2,339,193 (or 5.3%) to \$3,049,293 (or 7.0%).

Model B: Shared Regional High School

Model B: Shared Regional High School is illustrated in the schematic below.



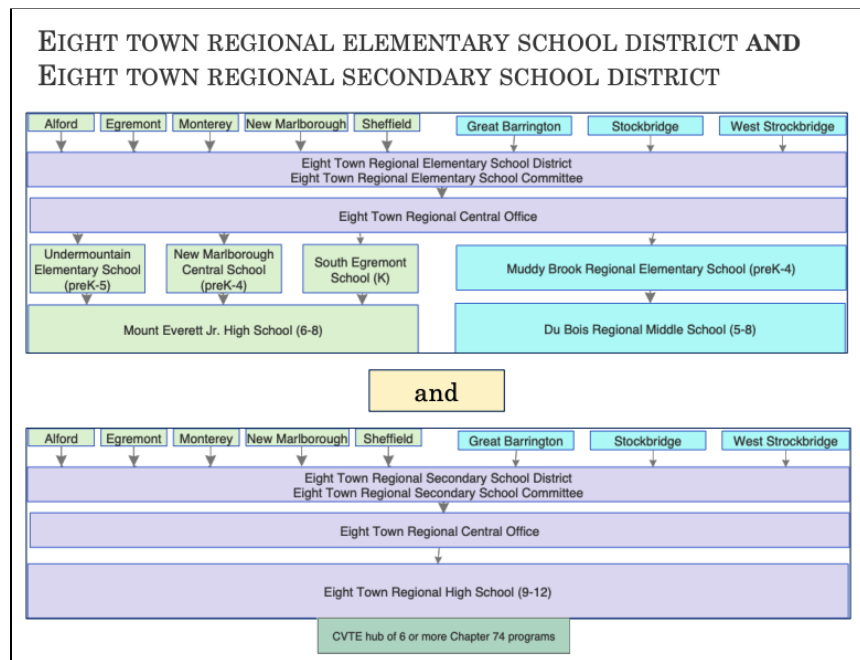
In the earlier section, we explored regionalization, which is the formation of a single district supported by two or more towns. Model B is a regionalization model, although focused on the formation of a single 9-12 high school region and the continuation of two existing or a single elementary (K-8) region. Under Model B, we are proposing two scenarios:

Scenario 1. High schools merge into a region, 2 elementary districts (K-8) remain as independent regions. Students at Mt. Everett and Monument Mountain students (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Elementary schools (K-8) would remain as is, forming two elementary regional districts. Overall, there would be three regional districts in operation.

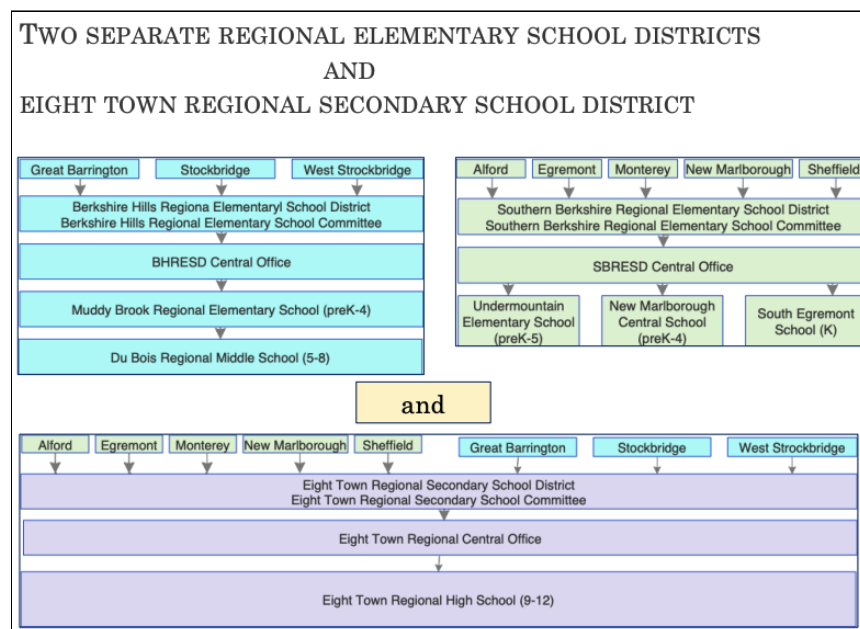
Scenario 2. High schools merge into a region, elementary districts (K-8) merge into a single elementary region. Students at Mt. Everett and Monument Mountain students (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Elementary schools (K-8) would remain as is, but become part of a single elementary region. Overall, there would be two regional districts in operation (K-8, 9-12)

A merged high school region is one of the three broad models in consideration by the RSDPB. While the formation of a region presents significant challenges (as outlined in the previous section), generally,

existing educational and organizational structures come into alignment and are more coherent when regions form.



OR



Overlapping functions include:

- The work of school committees (with various subcommittees)
- Central Office
- Information Technology and Operational Systems (Back Office, HR, Transportations, Sped, etc.)
- Negotiations and management of bargaining units (contracts, organizational structures)
- Educational systems (calendar, curriculum, assessment, professional development, etc.)

Overall, Model B and both Scenarios 1 and 2 do not achieve optimal regionalization benefits, given the challenges of regionalization remain substantial. For this basic reason, described further below, this particular model is not preferable and can, likely, be eliminated.

Model B Scenarios, Summary

Below, Model B Scenarios 1 & 2 are briefly described. Key elements that identify the number of districts, schools, central office/admin, impact to students, impact to staff, impact to governance, and impact to transportation, are noted. The scenarios either keep the same (two for Scenario 2) or increase (three for Scenario 1) the number of districts, central office/admin teams, and school committees. Both Scenarios result in the continuation of 7 schools as is, recognizing that the high schools will be merged, recognizing that while Mt. Everett remains open; it will only house grades 6-8.

Impact to staff will include expansion of central office/admin/central operations staff in Scenario 1 and likely reorganization in Scenario 2. Consolidation of grades 9-12 teachers/staff (high school) will occur in both scenarios. Both scenarios will impact students as all students in grades 9-12 (Monument and Mt. Everett) attend the new high school on the Great Barrington campus.

Finally, transportation is not likely to cost any more with travel times *longer* for some grades 9-12 students (those homes further away from the GB campus) and *shorter* (those homes closer to the GB campus). As stated, no student would ride the bus for more than one hour.

Model B. Merged Regional High School		
	SCENARIO 1	SCENARIO 2
	High schools merge into region, 2 elementary districts (K-8) remain independent regions Students at Mt. Everett (9-12) attend combined high school region on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed Elementary schools (K-8) remain as is, forming two elementary regional districts Overall, three regional districts operate	High schools merge in region, elementary districts (K-8) merge into single region Students at Mt. Everett (9-12) attend combined high school region on GB campus High school programs and staff are merged, additional CVTE programs (6-8) are constructed Elementary schools (K-8) remain as is but form a single elementary regional district Overall, two regional districts operate (K-8, 9-12)
Number of Districts	3 Districts	2 Districts
Number of Schools	7 schools (high schools merge)	7 schools (high schools merge)
Number of Central Office/Admin	3 Central Office/Admin teams	2 Central Office/Admin teams
Students	9-12 school students attend at new high school in GB All other students attend school as is	9-12 school students attend at new high school in GB All other students attend school as is
Staff	Additional central office must be formed, reconfigured, or shared High school staff consolidate in new school School staff remain as is	Additional central office must be formed, reconfigured, or shared High school staff consolidate in new school School staff remain as is.
Governance	Three school committees	Three school committees
Transportation	Cost equivalent to current No change to K-8 schools For high school, ride times will increase for some students and drop for others. Bus ride limits (HS) one hour	Cost equivalent to current No change to K-8 schools For high school, ride times will increase for some students and drop for others Bus ride limits (HS) one hour

Model B Scenarios, Recommendations

Scenario 1. High schools merge into a single region, 2 elementary districts (K-8) remain independent regions

We do not recommend that the high schools merge into a single region, with two remaining K-8 regional districts as a reasonable solution that merits any consideration.

Yes. Merging the high schools (9-12) in concert with the construction of a new facility is a strong value proposition for grades 9-12.

No. The realities of creating two additional regional structures, increasing the number of districts from 2 to 3, lacks reasonable justification and would result in limited operational and educational efficiencies.

Opportunity: The merger of the high schools (9-12) could be accomplished through a cost-center or supervisory union model more readily and reasonably than through the formation of three regions.

Scenario 2. High schools merge into a single region, elementary districts (K-8) merge into single region

We do not recommend that the high schools merge into a single region, with two grades K-8 regional forming a second regional elementary district as an optimal solution.

Yes. Merging the high schools (9-12) in concert with the construction of a new facility is a strong value proposition for grades 9-12. Additionally, an elementary school region would allow for specialized administrative and governance focus on grades K-8.

No. There is questionable rationale for going through a complicated regionalization process, involving all 8 towns, to create two new districts that focus on grade span.

Opportunity: The merger of the high schools (9-12) into a single region and elementary schools into a single region will be no less complicated, recognizing that higher impact and efficiencies can be achieved through either a full regionalization or a supervisory union solution.

Evaluation, Model B Scenarios

Model B. Merged Regional High School	SCENARIO 2 EASE-IMPACT MATRIX	
	SCENARIO 2	SCENARIO 2
EASE	Hard to do.	Hard to do.
IMPACT	Moderate	Moderate to High
FOUR DOMAINS		
EDUCATIONAL QUALITY	Moderate to High	High
OPERATIONAL EFFICIENCY	Low	Moderate
FINANCE	Low	Low to Moderate
FEASIBILITY	Low	Moderate

The evaluation grid (above) is a synthesized summary applying the evaluation criteria. These are described, briefly, below:

Scenario 1. High schools merge into a single region, 2 elementary districts (K-8) remain independent regions

1. Ease-Impact.

- **Ease:** Hard. We believe this scenario would entail the challenges associated with regionalization and multiply that by a factor of three.

- Impact: Moderate. While this scenario creates educational and operational opportunities at the merged high school (9-12), it also results in redundancy at the elementary level limiting potential alignment and coherence of the K-8 educational experience.

2. Four Domains.

- Educational Quality: Moderate to High. While expanding programming (CVTE, electives, advanced courses, enrichment) for grades 9-12 students, this continues a fragmented elementary (K-8) program across the region.
- Operational Efficiency: Low. Does not centralize operations and, rather, results in three administrative/central office systems. Offers some value in operations and efficiencies in grades 9-12.
- Finance: Low. More likely to have an impact on ensuring programs and service for grades 9-12, savings that could be absorbed by an expanded administrative operation.
- Feasibility: Low. Makes little sense to regionalize and increase districts/organizational structures.

Scenario 2. High schools merge into a single region, elementary districts (K-8) merge into single region

1. Ease-Impact.

- Ease: Hard to do. The regionalization process is difficult, and while this scenario limits districts/admin structures to 2, it will be hard to justify the effort.
- Impact: Moderate to High. Limited operational savings, but does impact educational systems through expansion of programming (CVTE, electives, advanced courses, enrichment) for grades 9-12 students, and potentially creates alignment for an 8-town elementary grades (K-8) system that results in educational value.

2. Four Domains.

- Educational Quality: High. Positive impact to high school (grades 9-12) and would lead to coherence and alignment in grades K-8.
- Operational Efficiency: Moderate. Efficiencies would be realized at the high school, but redundant central office and operational functions would remain in two separate regional districts.
- Finance: Low to Moderate. Results in class size balancing at high school, savings that can be reinvested or used to control fiscal liability to towns. Limited central office/operations savings.
- Feasibility: Moderate. There appears to be interest in addressing the high school program across the 8 towns, however, the effort needed to form two regions may limit interest and justification given the net result will be two separate regional districts (K-8, 9-12), rather than two K-12 districts as currently exist.

Advantages and Disadvantages/Discussion, Model B Scenarios

	Scenario 1	Scenario 2
ADANTAGES & DISADVANTAGES		
ADVANTAGES	<p>Construction of new high school with CVTE hub, right sized with expanded academic, career, and extra-curricular opportunities</p> <p>MSBA reimbursement for regionalization</p> <p>Expanded Professional Culture – PD</p> <p>Class size/cohort balancing, savings for reinvestment</p> <p>No changes to elementary/middle schools</p> <p>Aligned calendars, contracts, IT systems</p> <p>No changes to elementary/middle schools</p> <p>Additional local governance</p>	<p>Construction of new high school with CVTE hub, right sized with expanded academic, career, and extra-curricular opportunities</p> <p>MSBA reimbursement for regionalization</p> <p>Two regions (admin teams and school committees) that are focused on grade span specific issues and opportunities</p> <p>Expanded Professional Culture (including Professional Development) by grade span (9-12, K-8)</p> <p>Class size/cohort balancing, savings for reinvestment</p> <p>No changes to elementary/middle schools</p> <p>Retention of local governance in reorganized model</p>
DISADVANTAGES	<p>Additional central office, administrative, and governance structures (from 2 to 3)</p> <p>No alignment of Central Office and Operations</p> <p>No alignment of calendars, contracts, IT systems</p> <p>Could create transportation issues (costs)</p> <p>Regionalization process will be difficult</p> <p>Potential reduction of sports teams, drama programs, etc. in a merged high school</p> <p>Movement of Mt. Everett students to GB campus and integration of high schools</p> <p>Slightly increased class size at high school</p>	<p>Two administrative structures (9-12, K-8) that would result in operational redundancies and lack of alignment</p> <p>No alignment of calendars, contracts, IT systems</p> <p>Could create transportation issues (costs)</p> <p>Regionalization process will be difficult</p> <p>Potential reduction of sports teams, drama programs, etc. in a merged high school</p> <p>Movement of Mt. Everett students to GB campus and integration of high schools</p> <p>Slightly increased class size at high school</p>
CONSIDERATIONS	<p>The BHRSD high school building project offers a unique opportunity to launch an 8-town process that results in a generational facility that delivers a contemporary education in preparation for college, vocation, and career.</p> <p>The complexities of advancing a K-12 regionalization process present significant challenges. The realities of creating three regions with separate administrative structures and budgets to towns is unrealistic and with very little benefit. There are more optimal ways to get at a high school merger.</p>	<p>The BHRSD high school building project offers a unique opportunity to launch an 8-town process that results in a generational facility that delivers a contemporary education in preparation for college, vocation, and career.</p> <p>There is value in building a coherent, aligned K-8 elementary system.</p> <p>The complexities of advancing a K-12 regionalization process present significant challenges. The realities of reorganizing into two regions with separate administrative structures and budgets is unlikely.</p>

Discussion, Advantages and Disadvantages

We begin by offering that the broad value proposition of forming a regional high school and additional one to two elementary regions is questionable. While this model was driven by an interest in examining combined high school education and keeping the elementary schools as is, there are more efficient and impactful solutions (such as full K-12 regionalization).

Scenario 1. High schools merge into a single region, 2 elementary districts (K-8) remain independent regions

Scenario 1 proposes that high schools merge into a single 9-12 region, Mt. Everett and Monument (9-12) students attend a newly constructed high school (to be named) on the Great Barrington campus. High school programs and staff are merged, with additional Chapter 74, approved CVTE programs (6-8) added. The elementary schools remain as is, but two K-8 regional districts are formed (supported by the current BHRSD and SBRSD towns as current). Overall, three regional districts would be in operation.

Yes.

There are limited benefits that can be realized through Scenario 1, mostly at the high school.

- Focuses on the merger of high school, identified as a high promise solution for the 8 towns potentially serving as a way point for future regionalization/consolidation
- Results in a contemporary state-of-the-art high school facility that reflects broad educational programs, services, pathways and 6-8 high quality, approved CVTE programs
- Potentially allows for MSBA incentive towards new construction through regionalization incentive
- High school professional culture is expanded
- Eliminates competition between high school for students
- Generates higher savings through class size management (grades 9-12) that can be invested back into the system or to offset fiscal liability to the towns
- Allows for the alignment of curriculum, a teaching and learning system, assessment and data systems, and professional development - at the grades 9-12 level
- Retains local control and identity association with historical town arrangements
- A high degree of local governance

No.

There are significant challenges associated with Scenario 1.

- Results in more regional districts than exist currently, with corresponding central office/admin teams/school committees
- Does not align central office functions that would create efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example
- Does not align systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools
- Does not align talent/human resources systems including recruitment, licensure support, orientation, and mentoring

- Does not smooth a pathway for shared specialization staffing in areas such as special education, counseling, English language learners, and alternative education - with the exception of the high school
- With multiple elementary districts may complicate coordination of early childhood, out-of-school time, and summer programming
- Maintains the existing seven school facilities, thus full efficiencies are not realized operationally, or through full class size balancing outside of grades 9-12
- Current staff from SBRSD grades 9-12 will be relocated to the new high school and schedules that currently allow 7-12 assignments will be limited to 9-12
- Impacts school identities with two high schools merged into one
- Financing for the new high school and existing school debt will need to be fairly managed and may be perceived as a drawback
- High school class sizes will increase (based on modeling parameters)
- May result in (some) reduction of co-curricular affiliations such as sports teams, drama programs, bands - recognizing that enrollment in some of these may be currently challenged
- Regionalization (3 times) will be difficult and require coordination of 8-towns

Scenario 2. High schools merge into a single region, elementary districts (K-8) merge into single region

Scenario 2 proposes that high schools merge into a single 9-12 region, Mt. Everett and Monument (9-12) students attend a newly constructed high school (to be named) on the Great Barrington campus. High school programs and staff are merged, with additional Chapter 74, approved CVTE programs (6-8) added. The elementary schools remain as is, but a single K-8 regional district is formed (supported by the 8 towns). Overall, two regional districts operate (K-8 and 9-12).

Yes.

There are limited benefits (although a bit more than Scenario 1) that can be realized through Scenario 2.

- Focuses on the merger of high school, identified as a high promise solution for the 8 towns, potentially serving as a way point for future regionalization/consolidation
- Results in a contemporary state-of-the-art high school facility that reflects broad educational programs, services, pathways and 6-8 high quality, approved CVTE programs
- Potentially allows for MSBA incentive towards new construction through regionalization incentive
- Grade span professional culture (K-8, 9-12) could be expanded
- Eliminates competition between high schools for students
- Generates higher savings through class size management (grades 9-12) that can be invested back into the system or to offset fiscal liability to the towns
- Allows for the alignment of curriculum, a teaching and learning system, assessment and data systems, and professional development based on grade spans (K-8, 9-12)
- Allows for grade span focus of administrative teams and school committees that could result on targeted programming, evaluation, and investments
- Retains about the same level of local control, although governance will be assigned across 8 towns by grade span
- With one elementary district and one high school district, could facilitate coordination of early childhood, out-of-school time, and summer programming

- Will smooth a pathway (by grade span) for shared specialization staffing in areas such as special education, counseling, English language learners, and alternative education - although not fully realized given the continued existence of two regional districts

No.

There are significant challenges associated with Scenario 2.

- Results as many regional districts as exist currently, with corresponding central office/admin teams/school committees
- Does not align central office functions K-12 that would create optimal efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example
- Does not align systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools
- Does not fully align talent/human resources systems including recruitment, licensure support, orientation, and mentoring
- Maintains the existing seven school facilities, thus full efficiencies are not realized operationally, or through full class size balancing outside of grades 9-12
- Current staff from SBRSD grades 9-12 will be relocated to the new high school and schedules that currently allow 7-12 assignments will be limited to 9-12
- Impacts school identities with two high schools merged into one
- Financing for the new high school and existing school debt will need to be fairly managed and may be perceived as a drawback
- High school class sizes will increase (based on modeling parameters)
- May result in (some) reduction of co-curricular affiliations such as sports teams, drama programs, bands - recognizing that enrollment in some of these may be currently challenged
- Regionalization will be difficult and require coordination of 8-towns
- Would require additional intra-district choice policies, which could impact transportation demands

Opportunities, Model B Scenarios

It is likely clear that Model B offers limited opportunities and is hard to rationalize as optimal, let alone a viable set of solutions. While there is significant merit in a commitment to a merged high school and many benefits that emerge from this merger, the significant efforts needed to engage in a regionalization process (or multiple regionalization processes) should result in substantial efficiencies and outcomes K-12, rather than additional and redundant administrative, operations, and governance structures.

Many of the opportunities that are outlined in the Model A considerations listed previously apply in Model B as a result of the high school merger. Expansion of courses and curriculum, professional culture, and CVTE all serve as examples. However, savings generated through class size and cohort management in grades 9-12 could be quickly consumed by redundant administrative structures with 2 to 3 regional districts. Moreover, the existence of more than one central/administrative structure reduces operational, fiscal, and educational efficiencies, falling short of full alignment and coherence that are most likely to occur in a single system.

An alternative to Model B could be a supervisory union. A supervisory union is the maintenance of existing school districts as is, but consolidation of central office and administrative functions. Supervisory unions are offered by our team as a potential “additional” option and are described at the close of the modeling analysis. If the board/community are fully committed to merging the high schools, but are concerned about the formation of additional regions - a supervisory union may serve as a potential compromise solution. However, a supervisory union, as will be described later, while offering limited benefits (such as maintaining existing districts) has drawbacks in generating efficiencies and systems alignment.

Model B: Fiscal Analysis

Scenario 1. High schools merge into a region, 2 elementary districts (K-8) remain as independent regions. Students at Mt. Everett and Monument Mountain students (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Elementary schools (K-8) would remain as is, forming two elementary regional districts. Overall, there would be three regional districts in operation.

Fiscal Assumptions: With one less high school in operation and consolidation of high school resources, staffing levels at the high school level can be reduced to gain efficiencies. Estimated staffing impact and savings for this scenario are presented as a range, with the low end of the range showing savings based on 20 students per classroom and an average teachers' salary of \$50,000 and the high end of the range showing savings based on 22 students per classroom and an average teachers' salary of \$70,000. Strong investment in CVTE programming is included under this scenario. With additional responsibilities for administering an additional district, those in central office/administration see a negotiated increase in compensation. School Choice amounts are based on FY 2021 data showing that 49 SBRSD students went to BHRSD and 22 BHRSD students went to SBRSD, at a cost of approximately \$5,000 per student. The changes to School Choice revenues and expenses are equal and net to \$0.

Scenario 2. High schools merge into a region, elementary districts (K-8) merge into a single elementary region. Students at Mt. Everett and Monument Mountain students (9-12) would attend a combined high school on the current Great Barrington campus. High school programs and staff would be merged, and additional CVTE programs (6-8) would be constructed. Elementary schools (K-8) would remain as is, but become part of a single elementary region. Overall, there would be two regional districts in operation (K-8, 9-12)

Fiscal Assumptions: With one less high school in operation and consolidation of high school resources, staffing levels at the high school level can be reduced to gain efficiencies. Estimated staffing impact and savings for this scenario are presented as a range, with the low end of the range showing savings based on 20 students per classroom and an average teachers' salary of \$50,000 and the high end of the range showing savings based on 22 students per classroom and an average teachers' salary of \$70,000. Strong investment in CVTE programming is included under this scenario. School Choice amounts are based on FY 2021 data showing that 114 SBRSD students went to BHRSD and 47 BHRSD students went to SBRSD, at a cost of approximately \$5,000 per student. The changes to School Choice revenues and expenses are equal and net to \$0.

FISCAL AND STAFFING IMPACT								
	Scenario 1				Scenario 2			
	Low end of range		High end of range		Low end of range		High end of range	
	20 per class. \$50K avg salary		22 per class, \$70K avg salary		20 per class, \$50K avg salary		22 per class, \$70K avg salary	
School choice	\$		\$		\$		\$	
Revenues	\$ (355,000)		\$ (355,000)		\$ (805,000)		\$ (805,000)	
Expenses	\$ (355,000)		\$ (355,000)		\$ (805,000)		\$ (805,000)	
Net school choice \$ impact	--		--		--		--	
Other expenses	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%
Central office/admin	\$353,218		\$353,218		\$ --		\$ --	
HS/7th-8th	\$(525,935)		\$(1,092,935)		\$(525,935)		\$(1,092,935)	
Total savings	\$(172,717)	-0.4%	\$(739,717)	-1.7%	\$(525,935)	-1.2%	\$(1,092,935)	-2.5%
Staffing(FTE)	-8.0	-2.0%	-10.0	-2.5%	-8.0	-2.0%	-10.0	-2.5%

- The Total Savings line shows estimated savings in dollars and percentage when compared to total FY 2021 spending for both districts of \$43,730,414.
- The Staffing (in FTE) line shows estimated staffing changes in FTE and percentage when compared to FY 2021 staffing levels for both districts of 397.5 FTE.

Results:

Scenario 1

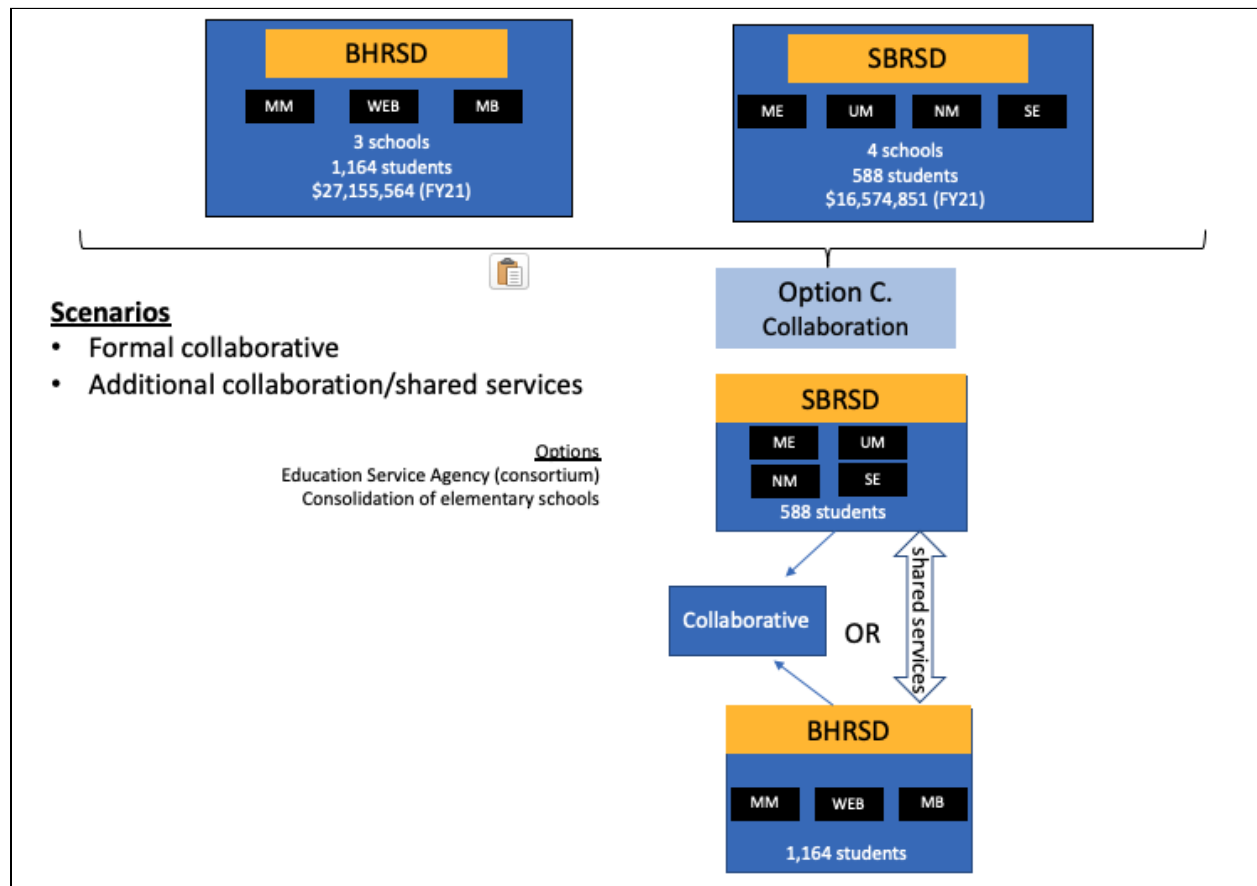
If BHRSD and SBRSD were to regionalize high schools, keep the existing districts for all other schools, and operate three districts, due to reductions in high school staffing and increases in the responsibilities of central office/administration, the districts can anticipate an estimated reduction in staff from current staffing levels ranging from 8.0 FTE (or 2.0%) to 10.0 FTE (or 2.5%), resulting in estimated savings of the districts' combined expenses ranging from \$172,717 (or 0.4%) to \$739,717 (or 1.7%).

Scenario 2.

If BHRSD and SBRSD were to regionalize high schools, regionalize PK to 8 grade levels, and operate two districts, due to reductions in high school staffing, the districts can anticipate an estimated reduction in staff from current staffing levels ranging from 8.0 FTE (or 2.0%) to 10.0 FTE (or 2.5%), resulting in estimated savings of the districts' combined expenses ranging from \$525,935 (or 1.2%) to \$1,092,935 (or 2.5%).

Model C. Collaboration

Model C: Collaboration is illustrated in the schematic below.

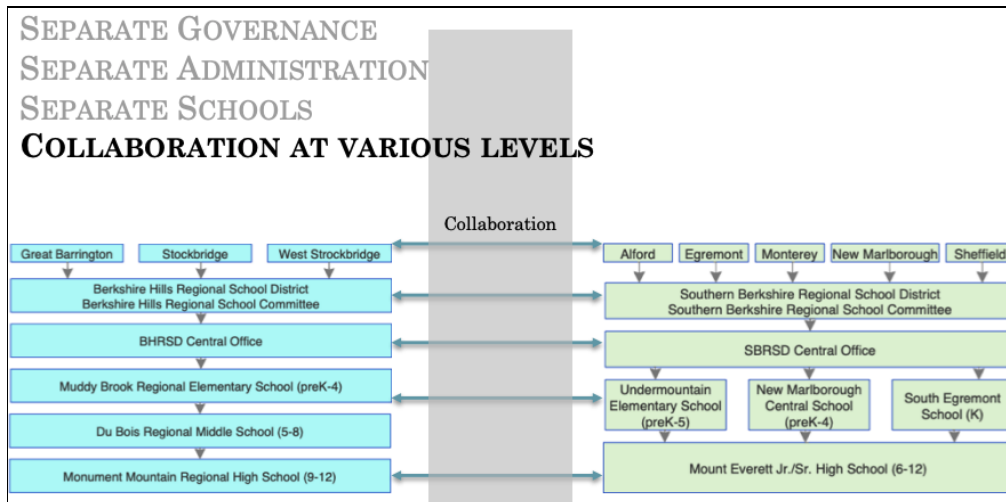


In the earlier section, we explored collaboration (shared services) in two forms, described below and depicted on the schematic above.

Scenario 1. Educational Service Agencies (ESA), also known as Collaboratives in Massachusetts. These act as third educational parties that allow access to resources such as staff, programming, transportation, services, and purchasing.

Scenario 2. Shared service arrangements. Both Ad hoc and Formal agreements between districts that result in shared resources (staff, materials, equipment, facilities, academic property). Designed to solve immediate problems that may exist between districts on a temporary or recurring basis.

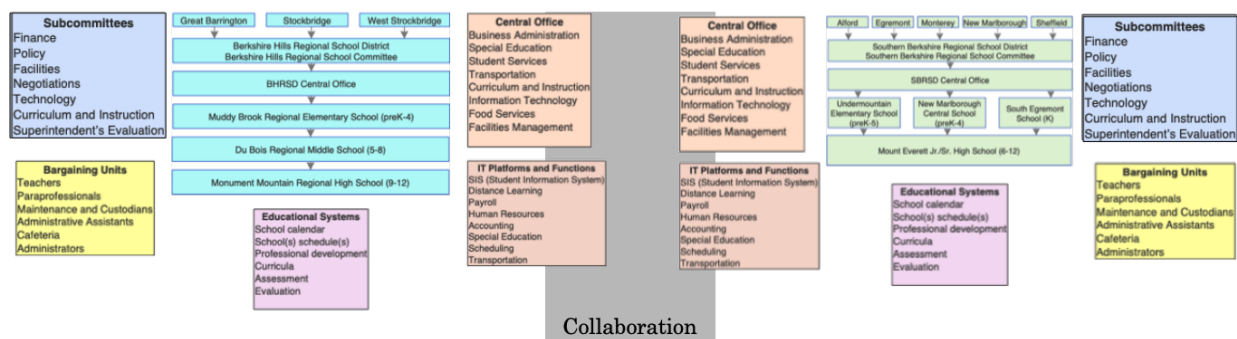
Collaboration (shared services and collaboratives) is one of the three broad models in consideration by the RSDPB. Generally, existing educational and organizational structures may make it more difficult for teachers, schools, school leaders, district leaders, and community leaders to collaborate, share and plan together.



Overlapping functions include:

- The work of school committees (with various subcommittees)
- Central Office
- Information Technology and Operational Systems (Back Office, HR, Transportations, Sped, etc.)
- Negotiations and management of bargaining units (contracts, organizational structures)
- Educational systems (calendar, curriculum, assessment, professional development, etc.)

The reality, then, is that collaboration in concept (which looks easy) may become quite complicated in collaboration, such as the adjusted organizational diagram offers below.



The two collaboration scenarios will be examined below.

Model C Scenarios, Summary

Below, Model C Scenarios 1 & 2 are briefly described. Key elements that identify the number of districts, schools, central office/admin, impact to students, impact to staff, impact to governance, and impact to transportation, are noted. Both models, in effect, keep the existing districts intact with the same number of districts, schools and central offices. There is minimal impact to staff and governance. The exception is the fact that under Scenario 1, a separate organization (a collaborative) must be formed consistent with Massachusetts regulations (see early section on collaboratives). This would create, under Scenario 1, an additional administrative/organizational entity, with an additional governance structure (a board of directors) and costs associated with operation.

Collaboration will have almost no impact to staff and limited impact on certain operational functions (such as transportation, special education, or vocational education as dependent upon what the collaboration agreements share. Impact to students will be limited to those collaborative programs supported by either a collaborative or a shared services agreement. Finally, transportation will likely remain as is, with the addition of transportation associated with any external or shared programming at a site other than a student's home school. This could involve a shuttle bus or vans, for example.

Model C. Collaboration	SCENARIO 1	SCENARIO 2
Described	Formal Collaborative The creation of a formal MA approved collaborative across the 8 Towns Could include additional Berkshire Districts	Additional Shared Services & Collaboration Building upon existing collaboration and historical planning efforts in formalizing a shared services approach across the two districts This could also include the formation of a consortium (a modified Education Service Agency) to include the two districts and, likely, additional Berkshire school districts
Number of Districts	2+ (2 Districts, 1 Collaborative)	2 Districts
Number of Schools	7 schools	7 schools
Number of Central Office/Admin	2+ (2 Central Office/Admin teams, plus a Collaborative Admin team)	2 Central Office/Admin teams
Students	No change, all students attend same school as is Some may attend collaborative programming	No change, all students attend same school as is Some may have access to cross-school/district experiences (courses/programs/enrichment)
Staff	Central office and operation remain as is School staff remain as is Additional staff will be needed for Collaborative.	Some consolidation of central office and operations staff is optional School staff remain as is
Governance	Two school committees, as is One collaborative board	Two school committees, as is
Transportation	Mostly, as is Some additional transportation associated with off-campus programming.	Mostly, as is Some additional transportation associated with cross- and off-campus programming.

Model C Scenarios, Recommendations

Scenario 1. Educational Service Agencies (ESA), also known as Collaboratives.

We do not recommend an ESA/Collaborative as a potential, realistic option.

Yes. Collaboratives can offer significant impact to member districts in providing services and programs efficiently, generating savings, and filling gaps due to limited district size/scale.

No. Challenges associated with establishing a collaborative, in an under-sized region, with both funding and sustainability questions suggest that a collaborative in the 8 towns, or covering all of Berkshire County for that matter, is unlikely.

Opportunity: A less formal education service agency, organized through regional partnerships and/or coalitions, could meet some of the needs traditionally provided through a formal collaborative given historical and ongoing cross-district efforts in the Berkshires.

Scenario 2. Shared services expansion

We acknowledge shared service arrangements as an effective and ongoing effort, but not as a transformative solution that will significantly impact broad educational and fiscal aims.

Yes. Shared services have been and are effective vehicles for cross-district collaborations that lead to (limited) expanded services and programs efficiently, savings, and closing gaps due to limited district size/scale.

No. Shared services are inconsistent, lack durability, and will not (as they are currently structured) yield the level of educational and fiscal impact desired by the 8-towns.

Opportunity: Shared services could be expanded and sustained through formal and binding agreements, shared oversight, and systems alignment across the 8-towns (two districts) - leading to increased levels of educational opportunities and fiscal savings.

Evaluation, Model C Scenarios

Model C. Collaboration	SCENARIO 1	SCENARIO 2
EASE-IMPACT MATRIX		
EASE	Hard to do	Easy to do
IMPACT	Moderate	Moderate
FOUR DOMAINS		
EDUCATIONAL QUALITY	Low to Moderate	Low to Moderate
OPERATIONAL EFFICIENCY	Low to Moderate	Low to Moderate
FINANCE	Low	Low
FEASIBILITY	Low	High
Model C. Collaboration	SCENARIO 1	SCENARIO 2
ADVANTAGES & DISADVANTAGES		

The evaluation grid (above) is a synthesized summary applying the evaluation criteria. These are described, briefly, below:

Scenario 1. Educational Service Agencies (ESA), also known as Collaboratives.

1. Ease-Impact.

- Ease: Hard. We believe that the potential to form a new collaborative will be very difficult (hard to do), if not impossible given the size of the region and associated startup costs.
- Impact: Moderate. If a collaborative was operated across the county, it could offer a moderate (at best) impact.

2. Four Domains.

- Educational Quality: Low to moderate. As dictated by a limited range of services offered.
- Operational Efficiency: Low to moderate. May have impact on targeted units such as special education, transportation, back office.
- Finance: Low. More likely to have an impact on ensuring programs and services.
- Feasibility: Low. 15,000 students is the recommended catchment for a formal collaborative.

Scenario 2. Shared services expansion

1. Ease-Impact.

- Ease: Easy to do. This is already happening and could be readily scaled.
- Impact: Moderate. Assumes the districts could build formal structures and commitments.

2. Four Domains.

- Educational Quality: Low to moderate. As dictated by the range of services offered.

- Operational Efficiency: Low to moderate. Could have an impact on specialized units such as special education, transportation, back office.
- Finance: Low. More likely to have an impact on ensuring programs and services.
- Feasibility: High. This is often a default compromise position in regionalization studies.

Summarized, the ease and feasibility of launching a collaborative is low, while shared services are high. Both collaborative models will have limited educational impact (low-moderate) with low financial impact.

Advantages and Disadvantages/Discussion, Model C Scenarios

Model C. Collaboration		
SCENARIO 1		
SCENARIO 2		
ADVANTAGES & DISADVANTAGES		
ADVANTAGES	<p>Is already happening, thus can be built upon, and scaled</p> <p>Retains existing districts and schools, and governance</p> <p>Can be tailored to specific needs</p> <p>Can access network of collaboratives statewide</p> <p>Can address gaps in programming and specialized personnel</p>	<p>Is already happening, thus can be built upon, and scaled</p> <p>Retains existing districts, schools</p> <p>Retains existing governance</p> <p>Can serve as a waypoint (proof of concept) for future mergers/regionalization</p> <p>Can address gaps in programming and specialized personnel</p>
DISADVANTAGES	<p>South region is too small to support</p> <p>Adds another administrative/organizational structure</p> <p>Little incentive to invest in costs needed to develop, startup, and sustain</p> <p>Can be staff intensive</p> <p>Expansion of neighboring collaboratives is unlikely</p>	<p>Not durable, hard to sustain</p> <p>Often rely on existing staff to manage</p> <p>Limited opportunities to leverage economies of scale</p> <p>Are voluntary</p> <p>Don't go far enough in leading to educational access, opportunity, and system's alignment</p>
CONSIDERATIONS	<p>Formation of an Educational Service Agency that acts as a collaborative without the formality. Focus on 2-5 key collaborative areas.</p>	<p>Formation of regional coalition through formal shared services agreements in areas such as professional development, IT, shared courses, grants. Leverage existing regional coalitions and relationships.</p> <p>Start with something substantive and hard (such as calendar/schedules) managed by a jointly formed Shared Service subcommittee.</p>

The grid above captures the most significant advantages and disadvantages the Model C scenarios present. A discussion follows:

Discussion, Model C Scenarios

Scenario 1. Educational Service Agencies (ESA), also known as Collaboratives.

Yes.

Education collaboratives have been and will continue to be a valuable part of a comprehensive solution to the pressing challenges for K-12 education across the Commonwealth for the following basic reasons:

- They can be effective in increasing district central office capacity, increasing academic opportunities for students, and lowering operating and administrative costs through economies-of-scale.
- Establishing a collaborative is a community and school-driven effort, so formation can be tailored in response to school and community needs.
- The Massachusetts model also allows for significant flexibility, with member schools and organizers choosing which services the collaborative will offer – with the option of expanding or diversifying services at a later date.
- As evidenced, collaboratives can also serve to create efficiencies, expand programming and services, fill gaps where districts are under-resourced, and trim costs (save money).

There is evidence of successful regional collaboratives that can be drawn from. The Southern Berkshire Educational Collaborative (SBEC), described in this brief and in the Historical Review of Educational and Regionalization and Collaboration Efforts, offered effective services in the areas of vocational education, related services, adult basic education, professional development, and special education throughout its existence, 1975 through 2012, and filled a gap in programming across the south region. However, it was not sustained over time.

There is no question that collaboratives are effective vehicles for public schools across the Commonwealth and nation. A full list of potential value propositions from special education to purchasing and vocational programming are described in the body of this brief and can be used to examine areas that serve to potentially build a targeted/specialized approach to collaborative formation.

No.

There are a number of reasons that prevent the formation of collaboratives in the south Berkshire region and, more generally, the Berkshires.

- The south county region, and more generally the Berkshires, are likely **too small** to effectively host a collaborative, with less than 15,000 students. The absence of a collaborative is a market response to the realities of funding and sustaining such an entity.
- The likelihood of expansion of our nearest collaboratives (LPVEC and CES) in Berkshire is low, absent significant changes to how collaboratives are formed and operated, due to organizational barriers.
- While historical collaboratives (such as SBEC) have been successful at times, they ultimately failed due to ongoing issues related to funding, leadership, programming, and perceptions that the return did not justify the investment.
- Collaboratives can be a bit of a double-edged sword since DESE provides oversight and requirements, but does not provide incentives for or financial resources towards formation/operation. In making a decision to form a collaborative (which we believe is not

realistic), RSDPB will need to carefully consider the time, effort, and resources that establishing and maintaining a collaborative requires.

- Education collaboratives are more or less staff- and resource-intensive depending on the range of services offered. A collaborative that focuses a broad range of services or that offers student-facing resources will need more in the way of staff and financial resources. A collaborative that more narrowly focuses on shared administrative functions, student transportation services, or cooperative purchasing - for example - will likely need less in the way of staff and financial resources, thus, an organizational model more likely to succeed in a region our size.

Scenario 2. Shared services expansion

Yes.

Shared services have been and always will be a valuable part of providing solutions needed in districts across the Berkshires and, specifically, south county.

- Regardless of whether the RSDPB and the 8-towns decide to fully regionalize or remain separate, shared services will continue to be a key part of providing programs and services to students and staff in light of limited resources, gaining economies of scale in an efficient way.
- There is really no limit to shared services. The comprehensive lists of possibilities provided throughout this brief suggest that shared services can include all aspects of district functions from direct services and programming for children, to shared operational functions and staffing.
- The ability to share services is bound only by the willingness across districts to engage with each other in developing, managing, and sustaining this wide range of shared services possibilities.
- Shared services are (comparatively) easy to do and are often conducted outside of the sight of governance structures as superintendents, business administrators, and special education directors strike both formal and on-demand deals to deliver shared service solutions across district lines. Shared services can be elevated to school committee level agreements across towns when more complicated and significant decisions to share administration or large operational units (for example food service) are considered.
- Shared services have a high degree of flexibility, allow districts to remain autonomous with limited disruption to the status quo, and allow service delivery to remain close to the schools with retention of operational control at the district level. There is likely much less political opposition to shared services, often the compromise position in regionalization talks between communities when merger prospects become unrealistic politically.
- Shared services can be used as a form of incremental change to allow districts to ease into more significant collaboration and merger options.

There is evidence of successful regional shared services, historical and ongoing, that can be drawn from and scaled. A full list of potential value propositions related to shared services is outlined throughout this brief, with a listing of current efforts on pages 6-10. Shared services have, and will likely continue to, have a regional impact regardless of whether the 8 Towns choose to maintain existing districts or to fully regionalize.

No.

As suggested, we believe that shared services will have a place in the 8 towns regardless of whether full regionalization or sustaining existing districts is decided. However, we do **not** envision shared services as a substantially transformative solution for the 8-towns for a variety of reasons.

- Shared services are **not durable** and the history of efforts demonstrate this. While many easy-to-accomplish and/or established shared services such as the Berkshire Health Group, cooperative sports, or food service bids exist, the ability to examine larger systems (such as IT, shared staffing, shared courses, and professional development) have been discussed, in some cases attempted, but rarely sustained.
- Shared services often **rely on existing staffing** to absorb additional duties without alignment of systems or recognition of time needed to absorb these responsibilities. For example, sharing a business manager within two accounting systems and two collective bargaining agreements lacks the system's efficiencies that result in an undue burden on the manager.
- Shared services have **limited opportunities to highly leverage economies of scale** and efficiencies necessary to realize substantial savings. This is often due, as mentioned previously, to systems that are out of alignment and, as a result, have a high degree of duplication of tasks and staff.
- Shared services are **difficult to sustain** given that managers must establish relationships and trust in order to act innovatively. When these managers cycle in/out of roles, the rationale and leadership support for these shared service arrangements can erode.
- **Quality control** of shared services (development, monitoring, and evaluation) can be difficult to achieve given the ownership is less-than-clear. The net result is inefficient redundancy when shared services are not closely attended to and, as a result, decline and are potentially dropped.
- Shared services are often **voluntary**, thus when there are questions of funding, efficacy, or leadership, a shared service arrangement can be quickly dropped by one of the member districts. As voluntary, they also can be selected as useful, or not, and districts can select in/out of shared services opportunities, leading to inconsistent cross-district (network) participation.
- Shared services often **nibble at the edges**, improving public opinion/optics (demonstrating that districts work together) but not leading to substantial opportunities resulting in better and more consistently aligned systems, and equal opportunity and access for students and staff.
- There are **insufficient incentives** from the state for inter-district collaboration.

Opportunities, Model C Scenarios

The following are offered as alternatives and/or opportunities within the two collaborative solution areas. We recognize that collaboration, as an often applied compromise position, will be strongly considered by the board and the 8 towns. However, a formal collaborative or ongoing shared services as is will not address or lead to optimal outcomes. As such, our team offers two alternatives to Scenarios 1 and 2 that stretch the traditional notion of a collaborative and demand more formal and binding commitments.

Scenario 1. Educational Service Agencies (ESA), also known as Collaboratives

It might be that a **less formal educational service agency**, organized outside the collaborative regulations, could be potentially formed based on current efforts occurring in the region. Ongoing efforts have been organized by the Berkshire County Superintendents Roundtable, the Berkshire

Educational Resources K12 (BERK) - formerly the Berkshire County Education Task Force - and historical collaborative efforts such as the Berkshire Compact for Education, the Readiness Centers and SBEC. Current and ongoing efforts, such as those described below, might be built-out to focus on expanding educational opportunities, such as:

- An educational collaborative providing educator and staff PD. This would build upon the countywide teacher professional development currently championed by the Berkshire Superintendents' Roundtable and BERK.
- An educational collaborative providing educational technology services and PD for teaching effectively with technology. This would build upon the current BRLI – the Berkshire Remote Learning Initiative.
- An educational collaborative organized to support high school reform and experiences (school-to-work) for students. This could be built upon the Portrait of a Graduate - a collaborative focused on high school reform work occurring at six Berkshire High Schools, currently funded by the Barr Foundation and administered by BERK.
- A collaborative that focuses on backbone services that districts, currently, have limited capacity to provide. This would be built upon study action teams organized through BERK, considering administrative and technical resources to support networks, data collection, analysis, research, grant writing, and evaluation services.

There are a number of other possible ideas that include out-of-school-time, shared staffing and courses, shared IT systems, support for talent development and human resources, etc. A list generated by BCETF as part of their collaborative research offers a solid starting point to consider.

An existing model that could be studied has been developed by [SDP](#), the Five District Partnership. This partnership was formed in 2012 between Chelsea, Everett, Malden, Revere, and Winthrop. This joint effort focuses on improving instruction and academic achievement through high quality instructional resources, professional growth and development for teachers, educator relationships, and efficiency and fiscal prudence. A partnership like this could be built across multiple districts without the formality of a collaborative but with a focus on priority areas.

Scenario 2. Shared services expansion

Shared services could be expanded and sustained through agreement, shared oversight, and systems alignment across the 8 towns (two districts) - leading to increased levels of educational opportunities and fiscal savings. This would require more *formal and binding* agreements that ensure partners commit over a period of time. The work of the Southern Berkshire Education Future (SBEF) and Shared Services Projects suggest the willingness to, at least, engage in the planning side of this work. This could include several areas such as:

- Shared IT systems. Currently, SBRSD has a half-time IT Director and the potential merging of the two districts into one IT system could result in aligned infrastructure and backbone systems and supports, shared purchase and alignment of software including student information, accounting, and - for example - a learning platform, and academic software and tools.
- Shared Professional Development. In line with the county-wide effort, coordinate PD across the two districts to ensure an intentional blend of pedagogical and content related PD based on role type and grade span.

- Special Education. Currently, the special education directors work very closely together (see [Special Education Analysis](#)) to coordinate ongoing programming and related services, as well as professional development and preschool.
- Shared high school courses. Access to courses that could be shared in an online/virtual, hybrid, or in-person format for electives and advanced courses.
- Coordinated Out-of-School-Time programming including after school, vacation and summer.
- Grant writing and program evaluation. Both districts have limited resources to engage in this work and may benefit from working in partnership.

We emphasize caution when considering this inventory of shared services options as these are the same lists that have circulated and re-circulated as potential opportunities over the last two decades plus. The issue with these shared services, as stated earlier, is that they are fragile, shared ownership has inherent problems that lead to lack of durability, and they are unlikely to generate the level of systemic change that could result in increased opportunities for students, efficiencies, and significant savings. They are easy to discuss and plan for, but the time needed to execute is often seen as not worth the effort, given limited impact educationally or fiscally. Those most likely to sustain are those developed on a more informal level between key managers (typically business offices, special education offices, and superintendents) in response to an immediate need or where the systems investment needed to participate is low.

A Final Note About CVTE in a Collaborative Model

This brief has limited the discussion of the expansion of CVTE as a value proposition through either the formation of a collaborative or expanded shared services. Our research team recognizes the expansion of CVTE as a strong value proposition for the RSDPB/8 Towns. Currently, only two Chapter 74 programs (automotive and horticulture) exist at Monument, and both need significant upgrades in order to fully meet contemporary Chapter 74 regulations (a full review of CVTE can be found [here](#)). We will frame several points to explain why our research team believes that CVTE expansion is unlikely through a collaborative or expanded shared services agreement.

1. **Given CVTE has been provided historically through the Southern Berkshire Educational Collaborative, one might ask, why can't we restart that model?** As mentioned, we do not believe the region is able to, in general, support the startup and maintenance of a collaborative for the range of reasons listed above. Additionally, Chapter 74 regulation related to space, time on learning, and exploratory opportunities will require significant investments. While historically these programs were run in concert with community spaces, these spaces are unlikely to meet contemporary standards that require current equipment, required floor/head spaces - square footage, and safety features.
2. **Might CVTE be expanded in each of the two high schools so that each school hosts a smaller number of Chapter 74 programs (likely 3-4 each) that students from either high school can attend?** This option is certainly possible but will require significant investment on both campuses. Currently, the Monument construction project is in process with the MSBA and offers a unique opportunity for the two districts to partner with the MSBA in building a right-sized high school with 6-8 Chapter 74 programs. It could certainly be that both high schools engage, independently, in a capital investment in building 3-4 programs, but that will require that SBRSD commit to this capital process beginning with an application to the MSBA. We also believe that splitting the programs between two sites will lead to lower levels of alignment, may compromise

recruiting (in that many students will want to stay in their home school), misses an opportunity to build a cohesive CVTE professional culture among faculty, and may result in lower alignment with grades 7 & 8 in building pre-CVTE experiences. It will also likely result in challenges to tuition relationships with south county students who would likely tuition from the north (Lee, Richmond, Lenox).

3. **Might the two districts consider the construction of a separate CVTE center, 9-12?** This is also an interesting idea that has merit but would require a significant amount of planning to determine the feasibility of an additional construction project (our assumption is that Monument would still be renovated), removes the CVTE program from close integration with the academic programming, would require careful attention to scheduling (week on/off, or split day), and may create some redundancies in staffing (administration, support staff, etc.) and operational costs leading to reduced efficiencies.
4. **Can CVTE be operated without formal Chapter 74 programs?** As outlined in the CTVE brief, there are many forms and approaches for school-to-work/career programming including exploration, awareness, and immersion experiences. Additionally, approaches like career academies and internships offer excellent opportunities for many students. CVTE/Chapter 74, however, is a sophisticated, sequential, rigorous sequence of academic, technical, and workplace standards and proficiencies that are held as the “gold standard” across the Commonwealth. Required hours, ability to access work sites legally, trained educators, alignment with industry, etc. - are all part of a sophisticated system that meets the highest standard of expectations and preparation.

Model C: Fiscal Analysis

In model C, Scenario 1 (Formation of a Collaborative) was not modeled. Our team does not see this as a viable solution and the costs associated with the formation of a collaborative would require additional expertise. Collaboratives are multi-million dollar operations that charge member districts in a variety of ways (membership, for services, per student). The formation of a collaborative is discussed in the Collaboration brief if the RSDPB deems this option as one worthy of additional exploration. A number of possible next steps are outlined.

Scenario 2. Shared service arrangements. Both Ad hoc and Formal agreements between districts that result in shared resources (staff, materials, equipment, facilities, academic property). Designed to solve immediate problems that may exist between districts on a temporary or recurring basis.

Fiscal Assumptions: With collaboration between the two districts, in the form of shared services, certain positions, like those associated with districtwide operations, can be reduced or consolidated if considered duplicative. With elimination of duplicative positions, certain remaining staff that take on additional responsibilities because of their expanded role in the new district see a negotiated increase in compensation.

FISCAL AND STAFFING IMPACT		
	Scenario 1	
School choice	\$	
Revenues	\$ -	
Expenses	\$ -	
Net School Choice \$ impact	\$ -	
Other expenses	\$/FTE	%
Central office/admin	\$ -	
Districtwide	\$(253,961)	
Total savings	\$(253,961)	-0.6%
Staffing(FTE)	-1.8	-0.5%

- The Total Savings line shows estimated savings in dollars and percentage when compared to total FY 2021 spending for both districts of \$43,730,414.
- The Staffing (in FTE) line shows estimated staffing changes in FTE and percentage when compared to FY 2021 staffing levels for both districts of 397.5 FTE.

Results:

Scenario 2.

If BHRSD and SBRSD were to collaborate and consolidate some districtwide operations, the districts can anticipate an estimated reduction in staff from current staffing levels of 1.8 FTE (or 0.5%), resulting in estimated savings of \$253,961 (or 0.6%) of the districts' combined expenses. Depending upon the pursuit of additional shared positions or programming, savings could be increased.

Models, Additional Options

As mentioned, in addition to the three models and seven scenarios, additional options were considered. These include additional school closures (elementary), formation of a school supervisory union, and the cost-center model. While these options are not core to our analysis, they are briefly described below as additional options for consideration.

1. Closure of Elementary Schools

The closing of elementary schools, specifically South Egremont and New Marlborough, have been historically discussed within the community and were considered as part of the team's due diligence in exploring a range of options. It was not deemed a preferable option due to the affinity that communities have with elementary schools. Specifically, we heard that there is a strong sentiment *against* closure of the smaller elementary schools in SBRSD, with close town affiliation and identity linked to these facilities, particularly for younger students.

This elementary stance is not unique, and is documented as a consistent trend in regionalization/consolidation research. The [facilities report](#) outlines a number of considerations pertaining to school closures. While the closure of any facility is typically needed to achieve true economies of scale, they are among the most controversial of any consolidation recommendations and, as is noted in the Hanover report, "creative solutions must mitigate *against* school closures."

Moreover, the need to pursue a reuse/repurposing planning is important to ensuring that these spaces/facilities are used in a productive way for the associated towns and offset the loss that communities experience when schools are closed. Repurposing can include educational programming or community/economic developmental resources.

Currently, both South Egremont and New Marlborough are rated below "1" (optimal) by the MSBA. Thus, we believe that monitoring of both enrollments and physical demands of the two facilities will be ongoing. Additionally, if a region is formed and/or a new high school is constructed, this could also influence choice patterns. Thus, while the recommendation to close an elementary school is not within our core models, we do believe there are both benefits and drawbacks.

Benefits: Benefits to closing elementary schools include:

- Cost savings are estimated at the low-end \$1,014,662 (10.8FTE), and at the high-end \$1,615,898 (18.9 FTE), which could be realized additionally through elementary school closures. If added to the most aggressive savings model (A3) this would result in total savings of \$4,084,210, 35.5 FTE at the low end and \$5,395,546, 46.5 FTE at the high end. These include class size balancing, facilities operations and management, and future capital needs²
- Transportation runs needed to service one elementary destinations versus three
- Costs associated with delivering meals, special education services, and administrative time/effort spread across three sites
- Full alignment of K-5 educational programming and services

² These were based on the closure of New Marlborough and South Egremont with parameters set to 18 (low) to 22 (high) for class size. As with the high/middle school scenarios, salaries were set at \$50,000 (low) and \$70,000 (high) for savings.

Drawbacks: Drawback to closing elementary schools include

- Loss of school identity and affiliation with host towns
- Potentially longer travel times (for some, not all)
- Class size (could increase slightly through elementary school consolidation)
- Family attachment, personalization, and relationships in a smaller school setting
- General sense of community in smaller schools

2. Supervisory Union

A supervisory union could be a way to accomplish the formal collaboration model, or manage the regional secondary district model. If more than one district exists after implementing a model, [Massachusetts General Laws](#) allow “the school committees of two or more towns to join together to form a union school committee. The organization of the union school committee is governed by statute, as are its powers, which are limited to the authority to employ a superintendent of schools, school physicians, school nurses, clerical and secretarial personnel, special teachers, and supervisors. All other powers and responsibilities are retained by the local school committees of the member towns.”

A supervisory union could reduce central office costs for the participating districts, and provide a ready vehicle for certain kinds of collaboration and alignment. The superintendent could propose ways to align calendars in the districts, for instance, so that professional development or sports teams or transportation might be shared and streamlined to some extent. Theoretically, administrative systems such as accounting, student information, or human resources software, if different, could be moved to one system. However, the superintendent and district administrators would need funds and personnel for that process. Without those resources, though, they would continue to manage two systems with associated duplication of effort.

An advantage of the supervisory union is that school committees retain local control of their schools. They agree on a central office budget, and each district pays its share, but all other budgeting is decided at the local school committee level. It can be overlaid on districts with much less effort than regionalization.

A disadvantage is that the central office must work under the direction of multiple school committees, with different policies and collective bargaining agreements that may not be in alignment and, for that matter, may be in conflict. Across the state in 2020 fifteen superintendents of supervisory unions worked for 62 school committees, or an average of four apiece. This means four sets of evening meetings, four budget processes, four sets of reports to file with the Department of Elementary and Secondary Education, and so on, with all the required meeting time, travel time, and mileage. Superintendents and central office administrators can burn out with such a load. Nor do they have the satisfaction of making a functioning whole of a group of towns and their schools.

3. Cost-center Model of Financing Elementary School

A serious issue in regionalization discussions can be whether and how existing small schools are kept open. These schools may be more expensive to run, and therefore increase town assessments across the district. To address this issue a cost center model for financing specific schools can be overlaid on any regionalization proposal, and written into the terms of the regional agreement.

Mount Greylock provides a template because its regional agreement allows towns to maintain separate budgets for their elementary schools, managing them as cost centers under the regional budget. Towns vote on a budget for shared regional costs (e.g. high school, central office) and also on a budget for their local school. Assessments paid into the central accounts include separate calculations for these two budgets, and the local school funds are then tracked and managed in the regional district's accounting system. Town assessments would start with the required minimum local contribution for the Chapter 70 state aid program, and assessments above the minimum would be determined by shares of the regional budget plus the local school budget.

Having an independent budget financed by the town(s) that a school serves removes conflicts over whether a school is more expensive to run, and allows a town to decide on budget lines that may be unique to them, such as an additional arts teacher. The cost center model requires that revenues as well as expenditures are tracked so that revenues such as choice tuitions, Medicaid reimbursements, or federal grants based on specific populations are credited to the school budget in addition to the town assessment.

A further guarantee for the continued existence of existing elementary schools would be a clause in the regional agreement that schools can be closed only by vote of the town in which they are located. This has been done in regional agreements around the state. If other towns in a merged district do not fund the extra costs of small schools, they will more easily agree to town control of a decision to close.

An overview of the Cost-Center model was presented to the finance subcommittee, and a transcribed presentation can be found [here](#).

Models, Summarized Fiscal Analysis

Expenses and Savings

Below is a summarized table of financial modeling (expenses and savings) for the three models and various scenarios. Estimated low-end savings are \$172,717 for Model B, Scenario 1, and estimated high-end savings are \$3,049,293 for the high end of the range for Model A, Scenario 3.

We will emphasize that all the financial models include a range of specific details (cost centers, positions, parameters) and calculations that are not included in this brief but are available to provide necessary backup and, more importantly, tools that enable future manipulations based on adjusted parameters and assumptions.

FISCAL AND STAFFING IMPACT										
Model A										
	Scenario 1		Scenario 2				Scenario 3			
			Low end of range		High end of range		Low end of range		High end of range	
			20 per class \$50K avg salary		22 per class \$70K avg salary		20 per class \$50K avg salary		22 per class \$70K avg salary	
Other expenses	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%
Central office/admin	\$(452,531)		\$(452,531)		\$(452,531)		\$(452,531)		\$(452,531)	
Districtwide	\$(597,658)		\$(525,258)		\$(525,258)		\$(525,258)		\$(525,258)	
HS/7th-8th			\$(525,935)		\$(1,092,935)		\$(1,361,404)		\$(2,071,504)	
Total savings	\$(1,050,190)	-2.4%	\$(1,503,725)	-3.4%	\$(2,070,725)	-4.7%	\$(2,339,193)	-5.3%	\$(3,049,293)	-7.0%
Staffing (FTE)	-6.8	-1.7%	-14.8	-3.7%	-16.8	-4.2%	-24.6	-6.2%	-27.6	-6.9%

Model B										Model C
	Scenario 1				Scenario 2				Scenario 1	
	Low end of range		High end of range		Low end of range		High end of range			
	20 per class \$50K avg salary		22 per class \$70K avg salary		20 per class \$50K avg salary		22 per class \$70K avg salary			
Other expenses	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%	\$/FTE	%
Central office/admin	\$353,218		\$353,218		\$ -		\$ -		\$ -	
Districtwide	-		-		-		-		\$(253,961)	
HS/7th-8th	\$(525,935)		\$(1,092,935)		\$(525,935)		\$(1,092,935)		\$ -	
Total savings	\$(172,717)	-0.4%	\$(739,717)	-1.7%	\$(525,935)	-1.2%	\$(1,092,935)	-2.5%	\$(253,961)	-0.6%
Staffing (FTE)	-8.0	-2.0%	-10.0	-2.5%	-8.0	-2.0%	-10.0	-2.5%	-1.8	-0.5%

Using the fiscal estimations shared above, we will apply an assessment methodology to convert these figures to calculated town assessments in the next section.

Assessments

Background

As part of the fiscal analysis performed, projections for each of the eight member towns' assessments were calculated based on the various models and scenarios. Additionally, a projection for the potential new high school was generated. In both cases, a variety of assumptions were applied, with the preferred methodology displayed below. Projected assessments were compared to the towns' FY2021 assessment to understand the potential impact of each of the models/scenarios. The comparisons display potential changes to assessments, assuming that potential savings identified are not reinvested into district programming, with the exception of additional CVTE staffing and compensation increases for individuals assuming additional responsibility in a combined region.

Berkshire Hills Regional School District assesses operating costs greater than the towns' combined required local contribution based on residential enrollment in the district's schools as of October 1 of the calendar year preceding the fiscal year for which the apportionment is determined. This assessment methodology is a one-year look that captures each town's in-district students and students in out-of-district placements. Capital costs are also assessed based on residential enrollment as of October 1.

Southern Berkshire Regional School District assesses operating costs greater than the towns' combined required local contribution based on a five-year rolling average of each town's required local contribution as compared to the required district contribution. This assessment methodology is a multi-year look that tends to mitigate swings in assessment shares from year to year, when compared to a one-year or two-year look, which tends to better capture the current environment. Capital costs are also assessed based on the five-year rolling average of each town's required local contribution.

Ideally, in a newly formed region, towns' assessments are held harmless or reduced, using a consistent assessment methodology such as one based on enrollment. Projected assessments calculated for a merger of Berkshire Hills and Southern Berkshire had to be adjusted to hold Southern Berkshire towns' assessments harmless and distribute projected savings fairly, largely because Berkshire Hills accepted, in FY2021, 250 choice students, including 114 from Southern Berkshire. To some degree Berkshire Hills towns' local assessments made up the balance between \$5,000 choice tuitions and average expenditures levels much closer to \$20,000 per student. Conversely, Southern Berkshire "provided" education for those 114 for only \$5,000, while operating schools at a much higher rate for only 77 choice students, including 47 from Berkshire Hills.

Assumptions for Projections

The following assumptions were applied in projecting member towns' assessments under different scenarios:

- Operating costs above the towns' required local contribution were assessed using FY2022's foundation enrollment, which is a one-year look.
- Existing debt service currently assessed to Southern Berkshire towns remains part of those towns' capital assessments, as the debt service will remain the towns' responsibility for any of the scenarios.
- Existing debt service currently assessed to Berkshire Hills towns is not included in those towns' capital assessments since that debt service would not be on the books if and when a new region is formed and operating.

- New debt service for the new high school was determined via a projected borrowing schedule using a 25-year term, 3.25% interest rate, and equal annual payments.
- New debt service for the new high school project is assessed based on each town's 2020 EQV (Equalized Valuation of all property in town), and projected using several assumptions. Multiple options with all eight towns paying for the new high school project have been generated. The preferred option has the Berkshire Hills towns paying for most of the project, with each district's towns assessed its portion of the debt based on each town's EQV share relative to the other towns' shares in the district. The Berkshire Hills towns' shares are the recently negotiated shares based on EQV. Other calculations for other options are available.
- Southern Berkshire's non-debt capital is part of the operating costs assessed to the towns since, assuming a newly formed region, capital investments in the Southern Berkshire schools would be the responsibility of all member towns.
- Using FY2021 enrollments and expenditures, there was a school choice imbalance between the two districts of 67 students, with 114 Southern Berkshire students choosing to Berkshire Hills and 47 Berkshire Hills students choosing to Southern Berkshire. At a cost of \$5,000 per student, Southern Berkshire had \$335,000 in net school choice expenses for these students. Actual student costs, based on market, are approximately \$20,000. At that rate, Southern Berkshire netted \$1,340,000 in dollars available for operating their schools from its net choice tuitions. To hold Southern Berkshire towns harmless requires essentially crediting the difference of \$1,005,000 in actual school expenses to Southern Berkshire towns' projected assessments, and correspondingly making it a liability applied to Berkshire Hills towns' projected assessments.

Assessment Projections

The following tables show assessment projections as a percentage difference when comparing the projected assessments to the current assessments. Only the assessments using the methodology above are displayed below.

1. No New High School Construction Factored into Assessment

Although a new high school in Great Barrington is probable, this first set of assessment projections assumes no new high school. These projections show the impact of estimated savings with the different models and scenarios and the impact of new debt on assessments when comparing potential models/scenarios with a new high school to this option. Under Model A and B, most towns end up with reduced assessments (as a percentage) as compared to current assessments. Sheffield, in Model B and C, experiences an increase in assessment.

	Model A					Model B				Model C
		Low	High	Low	High	Low	High	Low	High	
Town	1	2	2	3	3	1	1	2	2	1
Great Barrington	-5.8%	-6.9%	-8.3%	-8.9%	-10.7%	-3.6%	-5.0%	-4.5%	-5.9%	-3.8%
Stockbridge	-3.9%	-5.1%	-6.5%	-7.2%	-9.0%	-1.7%	-3.1%	-2.6%	-4.0%	-1.9%
West Stockbridge	-7.8%	-8.9%	-10.2%	-10.8%	-12.4%	-5.8%	-7.1%	-6.6%	-7.9%	-6.0%
Alford	-5.3%	-6.6%	-8.1%	-8.9%	-10.8%	-2.9%	-4.5%	-3.9%	-5.4%	-3.1%
Egremont	-2.0%	-3.3%	-5.0%	-5.9%	-8.0%	0.7%	-1.0%	-0.4%	-2.1%	0.4%
Monterey	-3.2%	-4.5%	-6.2%	-7.0%	-9.0%	-0.6%	-2.3%	-1.6%	-3.3%	-0.8%
New Marlborough	-9.3%	-10.5%	-12.0%	-12.6%	-14.5%	-7.1%	-8.5%	-8.0%	-9.4%	-7.3%
Sheffield	0.5%	-0.8%	-2.6%	-3.4%	-5.6%	3.2%	1.5%	2.1%	0.4%	3.0%
Totals	-4.5%	-5.7%	-7.2%	-7.9%	-9.8%	-2.2%	-3.7%	-3.2%	-4.7%	-2.5%

It's important to note that, as stated in the assumptions, an adjustment for school choice is factored into the assessment projections above. If this adjustment was not included, it would result in larger assessments to the five SBRSD towns and lower assessments to the three BHRSD towns. These calculations and projections are available.

2. New High School Construction Factored into Assessment

Under this option, a new high school is built at a cost of \$100 million. This figure is drawn from the most recent planning efforts that marked a high school project between \$70-96 million. In this model, Berkshire Hills' member towns pay for most of the \$100 million cost (about 90%), Southern Berkshire's member towns pay for some of the \$100 million cost (about 10%), and students from both districts attend the school. A 54.52% MSBA reimbursement rate is assumed, which includes a 6% incentive from the MSBA for regionalization of the 8 towns.

	Model A				Model B			
	Low	High	Low	High	Low	High	Low	High
Town	2	2	3	3	1	1	2	2
Great Barrington	0.5%	-0.9%	-1.5%	-3.3%	3.8%	2.4%	2.9%	1.5%
Stockbridge	21.5%	20.1%	19.4%	17.6%	24.9%	23.5%	24.0%	22.6%
West Stockbridge	2.4%	1.1%	0.5%	-1.2%	5.4%	4.1%	4.6%	3.3%
Alford	-1.1%	-2.6%	-3.3%	-5.3%	2.6%	1.0%	1.6%	0.1%
Egremont	-0.9%	-2.6%	-3.4%	-5.5%	3.2%	1.5%	2.1%	0.4%
Monterey	-1.5%	-3.2%	-4.0%	-6.1%	2.4%	0.7%	1.4%	-0.3%
New Marlborough	-8.7%	-10.2%	-10.9%	-12.7%	-5.3%	-6.8%	-6.2%	-7.7%
Sheffield	0.0%	-1.7%	-2.5%	-4.7%	4.1%	2.4%	3.0%	1.3%
Totals	1.3%	-0.2%	-0.9%	-2.7%	4.8%	3.3%	3.9%	2.4%

While projected assessments based on different options impact towns differently, member towns must be aware that how the operating costs and capital costs are to be assessed is **subject to negotiation** when compiling a regional agreement. Towns have historically considered multiple assessment options when regionalizing, even considering atypical options that do not follow a straightforward methodology. For these atypical cases, towns collaboratively worked together with the objective of ensuring that all towns accept the resulting assessments as satisfactory. If the eight member towns are to regionalize, then it is important that all member towns are satisfied with the resulting agreement to share the costs to operate a new region and, assuming it happens, the building of a new high school. Such collaboration on a regional agreement acceptable to all parties involved may be necessary for the eight member towns, as projected assessments based on a straightforward methodology using EQV did not hold all Southern Berkshire towns harmless or reduce their assessments and including the school choice adjustments as mentioned in the assumptions accomplished that goal. Over time, adjustments like these can be evened out via an annual rate of adjustment over enough years to make assessment changes manageable.

Looking Ahead, FY23 early projections

Our team worked with the DESE to examine the potential impact based on the emerging FY23 budget figures. Our core question - how (if at all) does state aid change as we emerge from Covid, as populations and the student body changes, and in light of potential CVTE investments? A report, by Ken Roche, is available [here](#). The report has six key findings based on the FY23 simulation:

1. Chapter 70 Aid, and its components do not change.
2. Towns' shares of required district contribution changes in the same amounts, in both actual and simulated workbooks.
3. In both workbooks, foundation budget increases trigger foundation aid increases which are absorbed by hold harmless aid.
4. In both workbooks, increases in local contributions are absorbed by local contributions above required.
5. CVTE enrollment will result in an increase in foundation aid of about \$914 per enrolled student per year.

6. The Actual Net School Spending (ANSS) of regional CVTE schools is comparable to current ANSS levels for both BHRSD and SBRSD.

Additional details can be found in the report.

Summarized Models, Summarized Evaluation

This brief offers three models that contain a total of 7 scenarios. Each of these has been presented and discussed in the previous sections. The team used two primary evaluation methods, the Ease-Impact Framework and the Four Domains as described earlier. Data used to inform analysis included the range of information that has been presented in various reports and shared with the RSDPB full and subcommittees, such as:

- Review of existing district conditions
- Historical and literature review
- Data and indicators (education, finance, enrollment/student flow, buildings, etc.)
- Survey, focus groups, interviews
- Modeling and analysis
- Team and expert consultation/discussion

As mentioned in our work plan, our data sets and our analysis should not be considered exhaustive or complete as we intended to evaluate the three models, but not identify each and every detail that is required to manage the formation or reorganization of a school district. Analysis and assumptions will need to be continued, debated, and challenged in moving towards both informed decision making and implementation of a preferred solution.

Our research efforts were conducted as objectively and as consistently with research traditions as possible. However, it was not our intention to seek approval by institutional review boards or via external peer review. Rather, we used members of our team, the Hanover team, network connections, and RSDPB members to strive for a high level of research integrity. We would consider our mixed-methods approach to include both qualitative (subjective, holistic and process-oriented, narrative) and quantitative (objective, focused, outcomes- oriented, numerical) data. This combination allows for a reasonable level of triangulation (the use of three or more sources), which leads to higher confidence in findings, limiting bias and leading to a more comprehensive perspective.

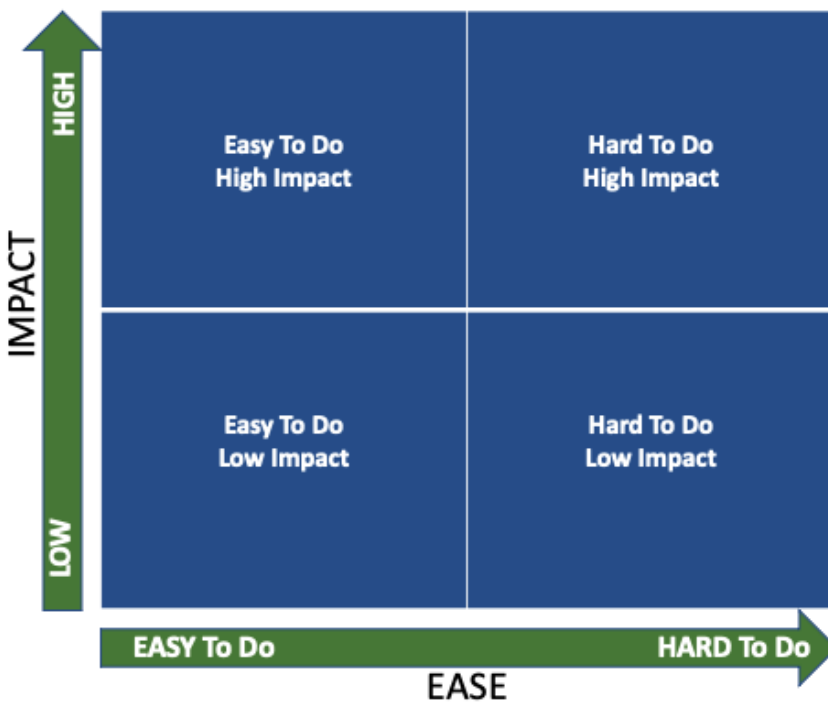
All modeling includes assumptions and parameters, as described throughout this brief, based on a variety of factors (class size, salary, school closures, grade configuration) that can be debated and adjusted.

Finally, our evaluation and findings were limited by our charge to provide the board with enough information to move ahead with the planning process. However, we did not conduct an exhaustive study that probes deeply into educational philosophy and practices at the school and classroom level, specific elements of assignment and work flow for personnel, or deep examination of contracts and governance. Our aim was to to help the RSDPB evaluate the three models to determine, generally, if there was enough merit in any one of the models/scenarios to move ahead in a preferred direction.

Below, each evaluation methodology is summarized.

Ease-Impact

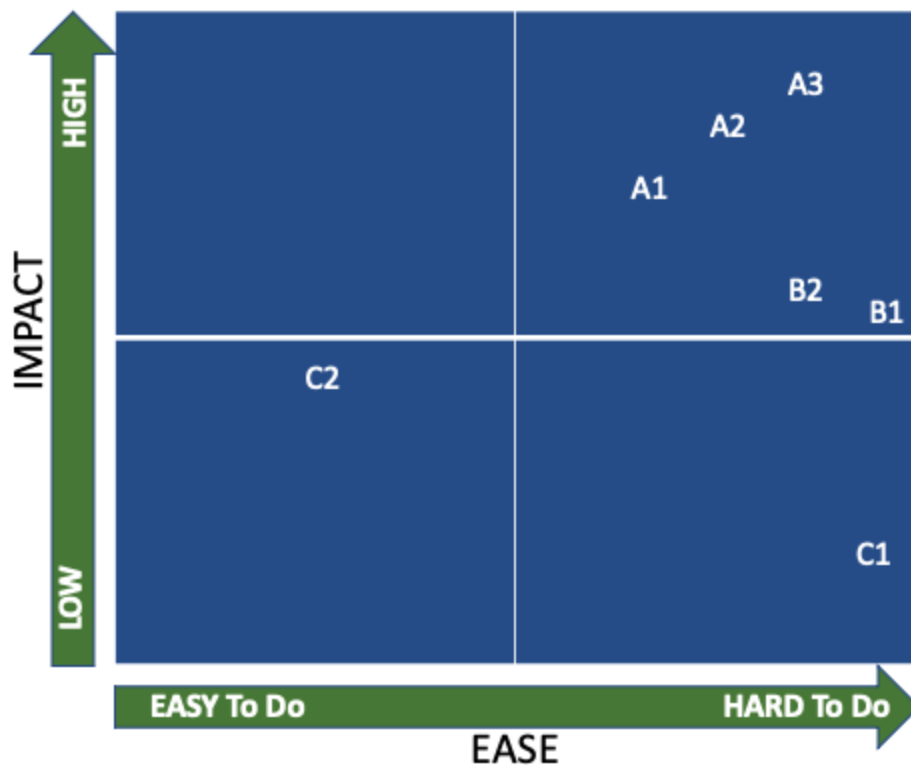
Models/Scenarios have been considered and placed into the various quadrants to communicate, in a relatively simple/broad way, whether they are *more or less* desirable. In short, most desirable fall into the top right quadrant (easy to do, high impact) and those least desirable fall into the bottom left quadrant (low impact, hard to do).



On the following page, the three models and seven scenarios are placed on the Ease-Impact grid. They are situated within each quadrant based on the assessment of where they are along a continuum.

The hardest model/scenario to do is the formation of a collaborative (C1), and it yields relatively modest impact. The easiest model/scenario to do is additional shared services (C2), and it also yields relatively modest impact. In contrast, both A2 (K12 region, merged 9-12) and A1 (K12 region, merged 9-12 and 7-8) are hard to do, but yield the highest impact. Formation of a shared high school region (B1 and B2) are both deemed very hard to do, with relatively modest impact.

While the Ease-Impact framework is certainly limited in analysis, it offers a fairly simple and quick way to example possible solutions and may be used by the RSDPB and additional stakeholders in considering these models/scenarios or others.



Model A: Full Regionalization (K-12)

Scenarios:

- **A1:** All schools remain open and as currently structured
- **A2:** Grades 9-12 merge into a regional high school
- **A3:** Grades 9-12 merge, & Grades 7-8 merge

Model B: Merged Regional High School

Scenarios:

- **B1:** High schools merge into a region, 2 elementary districts (K-8) remain as independent regions
- **B2:** High schools merge into a region, elementary districts (K-8) merge into a single elementary region

Model C: Collaboration

Scenarios:

- **C1:** Educational Service Agencies (ESA), also known as Collaboratives
- **C2:** Shared service arrangements.

The second evaluation methodology included the Four Domains. These were developed from the work plan and research questions and are a way to consider each model and scenario. The four domains that include:

- e. Educational Quality: Does the solution lead to improved, equitable educational access, opportunities and outcomes?
- f. Operational Efficiency: Does the solution lead to reduction in operational redundancies, greater system-wide alignment, and general operational efficiencies?
- g. Finance: Does the solution reflect efficient, sustainable models that build economies of scale allowing for expanded/reinvestment of and equitable distribution of resources across the 8 Towns?
- h. Feasibility: How realistic is the solution in terms of impact versus effort, politics, culture, legal/regulatory, readiness, desirability, incentives and disincentives?

There are a number of prompts (provided earlier in this brief) that we developed as leading questions within each of the domains. Each member of our team reviewed these prompts and also evaluated each model/scenario holistically. A number between 0 (little or no alignment or value) to 8 (highest alignment and high value) was used, with the collective of our team. A simple color designation of red, yellow and green, was developed as follows:

Red (0 – 2 points) - little or no alignment with evaluation criteria

Yellow (3 - 5 points) – moderate or some alignment with evaluation criteria

Green (6 - 8 points) - high or full alignment with evaluation criteria

The research team each evaluated the ideas and the criteria using the prompts and a holistic view of each criteria domain. In cases where particular domain ratings were significantly divergent (+/- 2), a discussion informed final ratings values based on argument, perspective, and final agreement. These prompts, as offered on the ease-impact framework, may also be used by the RSDPB and future stakeholders as they weigh options.

The grid below is a summary of the Four Domains. Green represents the highest alignment with the criteria, while red is lowest. Full K-12 regionalization as either Scenario 2 (grades 9-12 merge) or Scenario 3 (grades 9-12 and 7-8 merge) gained the highest alignment with three criteria including Educational Quality, Operational Efficiency, and Fiscal Impact. It was, however, deemed pretty hard to do (moderate) with the addition of a grades 7-8 merger as increasingly difficult.

Model B, Scenario 1, a high school merger with remaining independent districts, is deemed as least aligned with three criteria including Operational Efficiency, Fiscal Impact, and Feasibility. Model C, Scenario 1, a formal collaborative, was also deemed as in low alignment for fiscal impact and feasibility.

The most feasible option (consistent with the ease-impact framework) is Model C, Scenario 1, additional shared services. However, this was evaluated to have relatively low alignment with educational quality and operational efficiency criteria.

Finally, Model B, both Scenarios, deem the merger of the high schools as having high value, but falling short in terms of an elementary school value proposition.

		1. Educational Quality	2. Operational Efficiency	3. Fiscal Impact	4. Feasibility
Key: Red (0 – 2 points) - little or no alignment with evaluation criteria Yellow (3 - 5 points) – moderate or some alignment with evaluation criteria Green (6 - 8 points) - high or full alignment with evaluation criteria					
<u>Idea/Theme</u>	<u>Described</u>				
Model A.	Single K-12 Regional District that includes all 8 Towns				
Full Regionalization					
All schools remain open and as currently structured	No changes to current buildings. Students continue to attend their home schools. Central office is consolidated as are operational functions such as facilities, IT, food service.	3	3	4	5
Grades 9-12 merge	Students at Mt. Everett (9-12) attend combined high school on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Elementary schools remain as is.	7	6	7	5-
Grades 9-12 merge, & Grades 7-8 merge	Students at Mt. Everett (9-12) attend combined high school on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Grades 7-8 attend W.E.B. DuBois and Mt. Everett Grade 6 attended Undermountain, Mt. Everett is closed for repurposing. Elementary schools remain as is.	7+	6	7+	4
Model B.	Secondary High School Regional District (9-12) on single campus for 8 Towns				
Shared HS	Elementary Regional Districts (K-8) remain intact				
High schools merge, 2 elementary districts (K-8) remain independent	Students at Mt. Everett (9-12) attend combined high school region on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Elementary schools (K-8) remain as is, forming two elementary regional districts. Overall, three regional districts operate.	6-	2	2	2
High schools merge, elementary districts (K-8) merge	Students at Mt. Everett (9-12) attend combined high school region on GB campus. High school programs and staff are merged, additional CVTE programs (6-8) are constructed. Elementary schools (K-8) remain as is, but form an elementary regional district. Overall, two regional districts operate (K-8, 9-12).	6+	4	4	3
Model C.	Formation of a collaborative or additional collaboration. Both districts and all schools remain intact.				
Collaboration					
Formal Collaborative	The creation of a formal state collaborative per regulation across the 8 Towns or to include additional Berkshire Districts.	4	3	2	1
Additional Shared Services & Collaboration	Building upon existing collaboration and historical planning efforts in formalizing a shared services approach across the two districts. This could also include the formation of a consortium (a modified Education Service Agency) to include the two districts and, likely, additional Berkshire school districts.	4	3+	3	7
ALTERNATIVES that can be applied to all models					
Cost Center	Cost Center: Differentiated assessments by towns associated with schools in operations.				
Supervisory Union	Supervisory union: Shared superintendent and (potentially) administrative/central office staff. Allows for operations of both districts and all schools, autonomy to districts, and local control/governance while building opportunities for collaboration and alignment.				
Consolidation of elementary schools	Consolidation of elementary school: Could include grades 7-8 and/or elementary schools in SBRSD.				

Preferred Model, Recommendations

Introduction

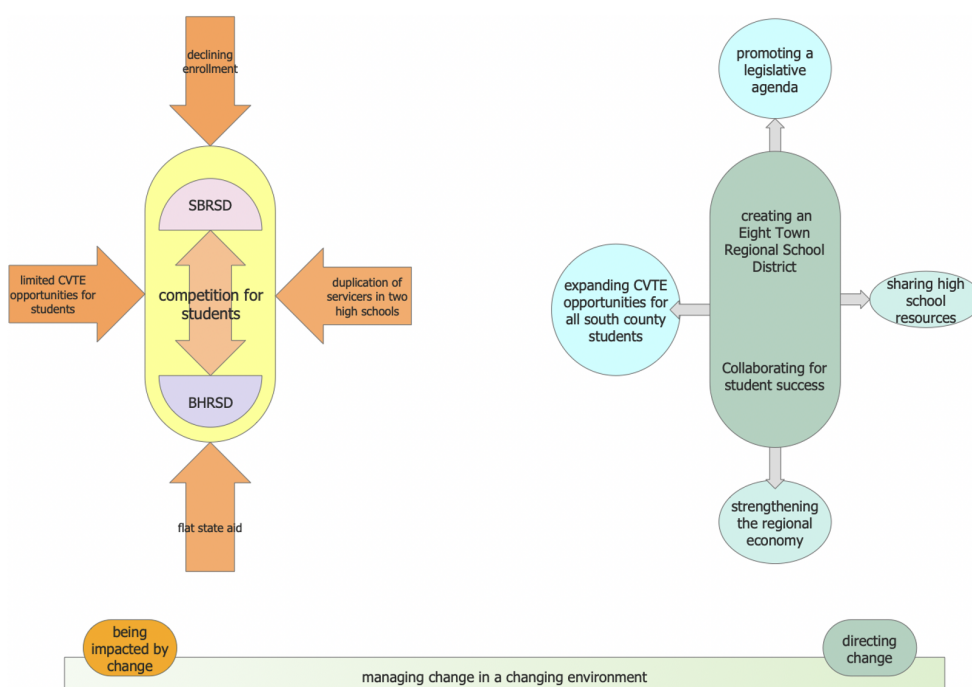
The aim of this research process and brief was to evaluate the three models with associated research team-generated scenarios. Additionally, the work plan outlined that the research team would “hone in on a preferred model in order to better understand the value proposition, implications and challenges.” In this section we will describe our preferred Model/Scenario (s).

The act of regionalization, as was offered by a state official, is one of deciding whether to educate children together or separately. The main question we seek to answer, thus, is:

Can the two school districts (8 towns) better function together or separately?

We believe that the answer to that question is a resounding **YES**. Whether through full regionalization or expanded shared services (collaboration) there is great benefit of working together in addressing the challenges of shrinking enrollment and strained resources in ensuring that academic programs and student services are continued and, possibly, enhanced. The strength of the local school districts in providing breadth of curriculum and academic/enrichment opportunities, equitable access, and positive outcomes for students are foundational to community development. The decision to live, to work, to relocate, to set up a business...is highly associated with the quality (both real and perceived) of the schools. It's critical then that schools are efficiently operated in order to maximize resources available for direct student services and/or to manage the fiscal liability to the towns.

Our team recognizes that change has occurred and will continue to occur. Jack Canfield once offered, “Change is inevitable in life. You can either resist it and potentially get run over by it, or you can choose to cooperate with it, adapt to it, and learn how to benefit from it. When you embrace change you will begin to see it as an opportunity for growth.”

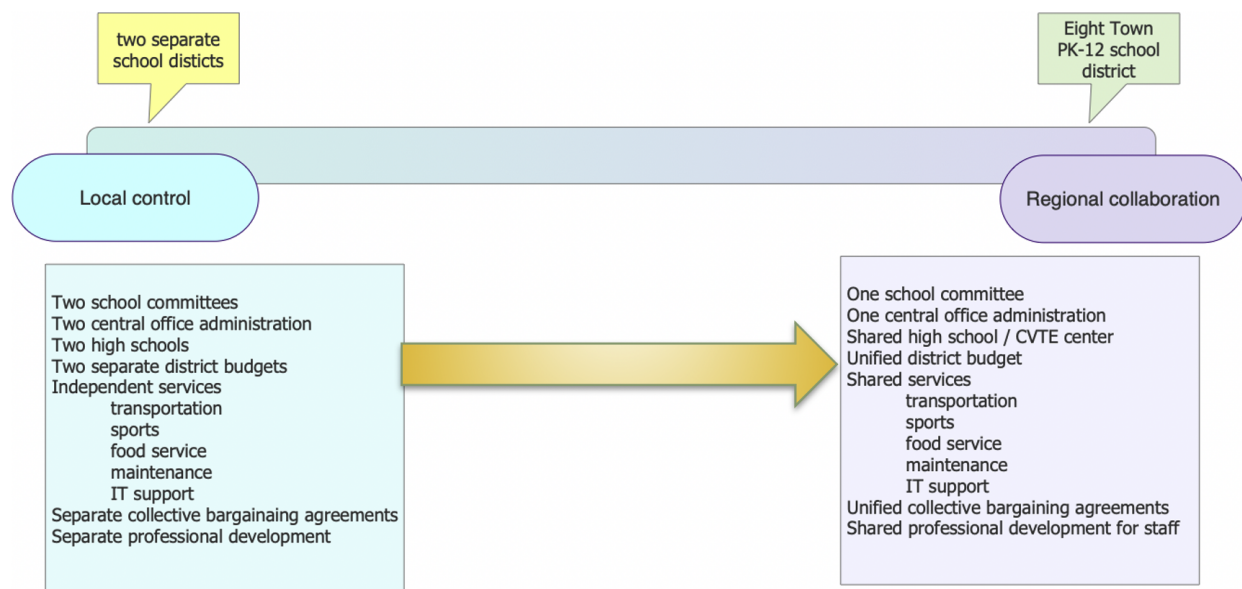


Change can be described, as displayed above, as a set of competing choices and value propositions against which action is taken - or not. On one side, being impacted **by change** may lead to ongoing constraints and challenges, while **directing change** may entail uncertainties, risk, compromise and discomfort - difficult to accept even when presented with compelling benefits and advantages.

We believe that the RSDPB and the 8 towns are in a position to manage this change, recognizing that:

- Enrollment is and is likely to continue to decline
- There will (likely) be no new state revenue (Chapter 70), thus additional fiscal liability will be placed at the local level
- Competition between students exists, will persist, and could accelerate
- Educational opportunities for students are static, and lacking (such as CVTE)
- There are administrative, operational, and governing redundancies at the district and school level
- A high school building project in Great Barrington is imminent

We recognize the tensions inherent in this process, the history of attempted efforts to regionalize and collaborate are documented in our historical review, and there are many. We see regionalization as a set of tensions that exist in communities. Some of these are practical, others regulatory, still others social/cultural. However, the idea of moving together will influence organizational structures and, in turn, how education is delivered at the highest quality level. To some degree, as displayed below, this is a question of both efficient use of resources and control on a local versus regional scale.



Systems, within organizational literature, are often defined as “surprising.” Our team recognizes the complexities and nuances associated with all systems, whether they are at the scale of the federal government, or a single classroom. They do, often, surprise. However, by slowing unwrapping we begin to reveal what is contained within. In some cases, as displayed in the many organizational models and configurations shared throughout this brief, they contain redundancies and inefficiencies that can complicate the ability to manage, to focus and invest in educational programming/services that impact

students, to support staff and ensure a strong professional culture, and to set and evaluate progress towards organizational goals. We believe by working together, these can be addressed.

Finally, as we head into the preferred models we share a short quote from Donella Meadows, “Everything we think about the world is a model – while our models have a strong congruence with the world, they fall short of representing the world fully.” We recognize that these recommendations can be considered, embraced, modified, or out-right rejected. The final decision belongs to the community, not our consulting team.

Using our best judgment, our experiences, and what we have learned - it is with this degree of acknowledged humility that we present our preferred recommendation (s).

Preferred Recommendation 1.

The Research Team recommends Model A, Scenario 2 for the RSDPB:

Form a single K-12 region that merges the high schools, 9-12 in a newly constructed building on the Great Barrington campus.

Advantages.

While we have articulated a set of descriptions, value propositions, and criteria for this Model/Scenario earlier in this brief, there are five important justifications to highlight:

- 1. Alignment and coherence - administratively, operationally, and educationally, across the 8 towns.** By consolidating central office, administrative, operations, and governance structures across the 8 towns we can:
 - Build alignment of central office functions that would create efficiencies related to operational functions such as central administrative staff, business office, facilities management, food service, and special education - for example.
 - Generate savings that can be reinvested in enhanced role types such as grant writing, human resource, diversity and equity leadership.
 - Align teaching and learning systems including high quality curriculum, data systems, and assessments.
 - Align systems and structures such as calendar, IT, and collective bargaining agreements to create opportunities for fluid exchanges and collaboration across schools.
 - Facilitate shared specialization staffing in areas such as special education, SEL counseling, English language learners, curriculum, and alternative education.
 - Create potential for expanded teaching-and-learning supports such as instructional coaches and interventionists.

2. **Expanded programming for high school (grades 9-12) students³.** The opportunity to partner on the construction of a state-of-the art high school facility offers a unique opportunity to shape a vision and design a facility that:
 - Delivers much needed Career Vocational Technical Education (Chapter 74) that is significantly lacking in south county.
 - Supports students in a variety of pathways through and beyond high school, recognizing that many go directly to work or fail to successfully earn a college degree.
 - Encourages contemporary educational practices that foster skills, competencies, dispositions, and experiences needed to thrive in a rapidly evolving world.
 - Offers a robust set of electives, building off the unique strengths of both high schools and ensuring all 700+ students have access to this breadth of opportunity. Is a community resource for the community, serving as a dynamic educational and training center.
 - Leverages up to 6% in additional state funds towards school construction.
3. **Savings generated can be reinvested in educational programs/services and to mitigate against fiscal liability to the towns.** By centralizing administrative functions and managing cohort/class size, savings in the range of \$1.5 to 2.1 million will be generated. These can be used to invest in:
 - Expanded out-of-school time experiences (summer, vacations, after-school).
 - Expanded early childhood programming (Early K).
 - Additional enrichment programming (arts, STEM, pre-vocational).
 - Additional Advanced Placement and early college/dual enrollment courses.
 - Student support in the areas of mental and social-emotional health.
 - Alternative education programs for at-risk students.
 - Specialized special education programs that meet the wide range of disability and need.
 - Limiting the fiscal liability to the towns.
 - Specialized roles such as diversity/equity/inclusion, family outreach and engagement, etc.
4. **Elementary schools will remain as is, within a single K-12 district.** We recognize that maintaining the elementary schools has been emphasized as important to the eight towns, particularly SBRSD. In doing so we:
 - Ensure students attend K-8 in their home schools, as affiliated with town identity and culture.
 - Avoid the political challenges that are often associated with school closures.

³ One of the more promising regionalization efforts has been the Six Town Regionalization Planning Board (Gill-Montague and Pioneer Valley). They recently presented some [initial findings](#) including recommendations that “high schools that have fewer than 300 students face significant educational challenges due to economies of scale, and financial constraints due to Chapter 70 funding.” They add,

“secondary schools need to have at least 350 to 400 students to support rigorous educational offerings such as electives, arts, extracurricular activities, sports and clubs. Because low enrollment does not reach adequate economies of scale, it creates significant course scheduling challenges by limiting what classes and co/extracurriculars (athletic teams, clubs, etc.) can be offered and scheduled,” the release explains. “Therefore, just improving a school’s financial situation ... will not adequately address many of the academic challenges caused by the lack of the economies of scale.”

- Ensure full coordination of elementary and middle school programs ensuring alignment of teaching and learning, curriculum, progress monitoring, enrichment opportunities, intervention services, professional development, etc.
- Maintain existing (quite small) class size ratios that are important to the district in grades K-8.
- Limit changes to transportation/transit times for students K-8.
- Ensure community partners can better partner and integrate equitably with all schools and students through a centralized entry and engagement process.

5. Ability to build a vision and collective culture as an 8 town community. A key challenge in any regionalization process are the perceived (actual or real) differences in identity, culture, and power structures. This model allows for:

- A collective process (the design and construction of a high school) that can unify the 8 towns through the formation of a shared vision, educational program, and set of skills/competencies/experiences for 700+, 8 town, grade 9-12 students.
- A process conducted in partnership with community members, businesses, students, workforce/economic development specialists, and educators to identify CVTE programs (10 are offered as starting points based on interest, history, and workforce needs) for the new high school.
- The development of an expanded 8 town professional culture that ensures recruiting and orientation, professional development and training, networking by role type, content area, and grade span, and common planning/team time.
- Integration of innovative community approaches to whole-child/family development, such as collaborative care, to ensure a community invested approach to student development.

Our team has *intentionally* avoided overly detailed and specific recommendations related to educational and programmatic investments with just one exception, the addition of CVTE teachers to ensure that 6-8 programs can be supported in the new high school. Otherwise, we believe that the decisions to invest in specific educational enhancements, such as those listed here and those included previously on a summarized opportunities grid, **must be made by the community**. Whether to invest in expanding early childhood, Diversity/Equity/Inclusion, social-emotional learning, or a new curriculum needs to be made by the stakeholders in the community. We emphasize that not everything listed as possible is possible. Decisions and priorities must be set, and these should be set through an educational visioning process that will occur through the regionalization work.

Drawbacks.

There are, of course, drawbacks to this recommendation including:

- Regionalization is hard, and combining two K-12 regions will be ground-breaking work that will require a high degree of coordination across 8 towns.
- To realize savings, class size balancing will result in slightly larger classes, modeled at 20 and 22.
- This will change governance and require that a fair representative model is developed and accepted.
- By combining high schools, some co-curricular activities (namely sports) may limit access. However, we also anticipate the possible expansion of sports (for example lacrosse) and ownership of teams by the district rather than through cooperative agreements.
- A fair assessment plan across the 8 towns will be needed.

- Financing for the new high school and existing school debt will need to be fairly managed and may be perceived as a drawback.
- Current high school staff (9-12) from SBRSD would be located to the new high school, which could present issues related to staff who are in grades 7-12.
- This modeling maintains all seven facilities, limiting potential operational savings.

Advocacy:

We recognize the significance of this project for the region, but also for the Commonwealth. Regionalization has been a challenging issue that has been difficult to realize. A number of reports, [Fiscal Conditions of Rural Districts](#), [2017 State Auditor Report](#), and [Special Commission Report](#), all reinforced by the Rural Commission, outline key elements of policy/regulatory changes needed to support and incentivize the regionalization process. We believe the work of our Team and the RSDPB, if a decision to regionalize is made, can set the stage to make **bold asks** that relate to areas such as:

- Reformulating regional bonus aid (or adding a one-time incentive to encourage this super-regionalization process)
- Increasing minimum state aid and/or ensuring or increasing sparsity aid
- Guarantee regional transportation aid for new super-region, at 100%
- Provide resources for the regional transition process (during which the existing and new school districts overlap)
- Guaranteed ongoing planning grants, including providing resources to support regional planning studies, including additional funds and technical assistance
- Working with the MSBA and DESE pertaining to recapturing grant monies and offsetting existing capital debt to incentivize this ambitious effort
- Addresses existing regulatory (additional) barriers towards regionalization
- Considering alternative taxation methodologies, such as a single tax rate across a RSD⁴

We believe that if the RSDPB chooses a regionalization process moving forward, the Berkshire delegation and groups such as MASS and MASC can play a key role in supporting this advocacy platform forward. The board should accept nothing less than a number of incentives from the state to tackle this incredibly difficult and complex task. This groundbreaking work sets a precedent for future efforts across the Commonwealth and should be recognized as such.

Importance of the building project

Many regionalization processes fail for a variety of reasons, one being that the benefits found are not compelling enough to drive communities to act. However, there have been some successes when districts are more alike than dissimilar, and when they are able to rally around a common vision, namely the construction of a facility. Regionalization efforts with building projects have included: Ayer-Shirley, Berkeley-Somerset, Harwich-Chatham.

When our team launched this process, we did not recognize the level of importance that the impending Monument Mountain renovation process held. We do now and offer some related thoughts:

⁴ There are a number of alternative fiscal options that have been shared, including one from Chip Elitzer that includes a single property school tax rate across a region. Chip was gracious to meet with our team and share his methodology, which we do not reject or endorse but offer as an additional resource. A brief overview can be found at <https://theberkshireedge.com/the-case-for-regional-school-district-tax-reform/>

An impressive amount of work has gone into the Monument renovation/construction project since 2008, please refer to the [facilities report](#) for a full timeline. The effort gained early approval by the MSBA, but failed twice at town voting, almost a decade ago. Since that time, a regional agreement and updated educational plan have positioned the project for potential success at the town vote. However, after three rejections by the MSBA, the project was invited into the Eligibility phase and will likely be able to access capital in/around 2024-25. Among highlighted elements in the most recent application (SOI) were the current regionalization conversations and an increased emphasis on CVTE education. We believe the Monument project (we will refer to it as the new high school) will have a critical impact on this project in that:

- a. It provides an opportunity for a capital campaign that will result in the construction of a state-of-the-art high school that could effectively serve the students and the community as a contemporary educational facility.
- b. The new high school project has the potential to meet the CVTE gap that has been identified in former regionalization studies and has been identified among stakeholders (and our research team) as a critical need. This CVTE hub could also fill community workforce/training needs and serve other south county districts.
- c. If a decision to combine high schools (into a single new high school) is made through the formation of a new region, the project stands to potentially receive a significant incentive (up to 6%). Moreover, increasing the enrollment to include all eight towns (through certification) will lead to a right-sized building footprint that results in an expanded design that reflects optimal academic, vocational, and co-curricular opportunities.
- d. The timing of the new high school project provides a unique opportunity for joint district (eight town) participation in the feasibility and design work, including the educational program plan design. This co-designing of a new high school has the potential to bring together the eight towns, providing broad stakeholder voice and engagement, in building trust, a common vision and a shared culture.
- e. An eight town commitment creates a compelling case to the state/MSBA for approval of an investment that could land significant state funds (between 50-60%) as offset to the local taxpayers in building a flagship education facility that could become a point-of-pride for the eight town/south Berkshire region.
- f. If there is no commitment to a shared high school, there may be some (although we would argue limited) opportunity to integrate Mt. Everett students in the future. However, the building would not be right-sized, programming would be compressed based on the certified enrollment figures at the time of construction, and both choice and tuition could be limited. Recognizing choice seats are available, it may be that the already unbalanced choice patterns of students from SBRSD selecting BHRSD becomes further lopsided, compounding enrollment decline at Mt. Everett. This also limits the opportunity to build a shared, eight town vision and potential combined region (including representation through governance).

Moreover, for those students from Mt. Everett who seek access to CVTE programs, seats may be limited. If available and accepted, tuition liability to the 5 SBRSD towns will be at

the state rate, about \$18,000 per student. If just 20 students choose this option and are accepted, liability to the towns could approach \$360,000 in tuition payments.

Fiscal Analysis, Preferred Model

Expenses and Savings

As part of the fiscal analysis, estimated savings under a potential region of Berkshire Hills Regional School District and Southern Berkshire Regional School District were identified and calculated.

With a combined central office and district, certain positions, like those associated with the School Committee, the Superintendent's Office, and districtwide operations, should not be duplicated. With one less high school in operation and consolidation of high school resources, staffing levels at the high school level can be reduced to gain additional efficiencies. With elimination of duplicative positions and a combined district, certain remaining staff that take on additional responsibilities because of their expanded role in the new district see a negotiated increase in compensation. Strong investment in CVTE programming is also included.

Estimated staffing impact and savings for this scenario are presented as a range, with the low end of the range showing savings based on 20 students per classroom and an average teachers' salary of \$50,000 and the high end of the range showing savings based on 22 students per classroom and an average teachers' salary of \$70,000.

FISCAL AND STAFFING IMPACT				
	Model A			
	Scenario 2			
	Low end of range		High end of range	
	20 per class		22 per class	
	\$50K avg salary		\$70K avg salary	
Other expenses	\$/FTE	%	\$/FTE	%
Central office/admin	(\$452,531)		(\$452,531)	
Districtwide	(\$525,258)		(\$525,258)	
HS/7th-8th	(\$525,935)		(\$1,092,935)	
Total savings	(\$1,503,725)	-3.4%	(\$2,070,725)	-4.7%
Staffing (FTE)	-14.8	-3.7%	-16.8	-4.2%

If BHRSD and SBRSD were to fully regionalize, combine high schools, and keep all other schools in operation as they are today, due to duplicative central office/administrative, districtwide, teaching, and other positions, the districts can anticipate an estimated reduction in staff from current staffing levels ranging from 14.8 FTE (or 3.7%) to 16.8 FTE (or 4.2%), resulting in estimated savings of the districts' combined expenses ranging from \$1,503,725 (or 3.4%) to \$2,070,725 (or 4.7%).

Assessments

Assessment Projections for the recommended option include:

- Estimated savings compiled for the low end of the range, with 20 students per classroom and a \$50,000 average teachers' salary, and the high end of the range, with 22 students per classroom and a \$70,000 average teachers' salary.
- Operating expenses above the combined minimum local contributions assessed using FY2022 foundation enrollment.
- Projected new debt for the high school project, including MSBA reimbursement, with Berkshire Hills towns paying for about 90% of the debt and Southern Berkshire towns paying for about 10% of the debt.
- New debt assessed using 2020 EQV.
- Existing debt currently assessed to Southern Berkshire towns remains as part of their capital assessment. Existing debt currently assessed to Berkshire Hills towns does not remain as part of their capital assessment since it would not be on the books if/when a new region is formed.
- Existing non-debt capital assessed to Southern Berkshire towns is part of operating expenses.
- Crediting the difference of \$1,005,000 in actual school choice expenses to Southern Berkshire towns' projected assessments, and correspondingly making it a liability applied to Berkshire Hills towns' projected assessments. These adjustments are reflected in the operating assessments.

Operating Assessments

		Scenario 2					
		Low End of Range			High End of Range		
		20 per class, \$50k avg. salary			22 per class, \$70k avg. salary		
Operating	Current	New	Difference	%	New	Difference	%
Great Barrington	\$ 17,064,184	\$ 16,360,011	\$ (704,173)	-4.1%	\$ 16,114,250	\$ (949,934)	-5.6%
Stockbridge	\$ 2,856,577	\$ 2,790,819	\$ (65,758)	-2.3%	\$ 2,748,398	\$ (108,179)	-3.8%
West Stockbridge	\$ 3,170,825	\$ 2,972,441	\$ (198,384)	-6.3%	\$ 2,930,020	\$ (240,805)	-7.6%
Alford	\$ 440,951	\$ 422,062	\$ (18,888)	-4.3%	\$ 414,847	\$ (26,104)	-5.9%
Egremont	\$ 1,617,010	\$ 1,604,079	\$ (12,931)	-0.8%	\$ 1,574,873	\$ (42,137)	-2.6%
Monterey	\$ 1,566,366	\$ 1,534,150	\$ (32,217)	-2.1%	\$ 1,506,662	\$ (59,705)	-3.8%
New Marlborough	\$ 2,812,384	\$ 2,577,020	\$ (235,364)	-8.4%	\$ 2,533,726	\$ (278,658)	-9.9%
Sheffield	\$ 7,087,015	\$ 7,209,492	\$ 122,477	1.7%	\$ 7,080,298	\$ (6,717)	-0.1%
Totals	\$36,615,311	\$35,470,073	\$ (1,145,238)	-3.1%	\$34,903,073	\$ (1,712,238)	-4.7%

Projected operating assessments show that, even with the school choice adjustment, each of the Berkshire Hills towns' assessments would decrease, mainly due to the estimated savings determined, and each of the Southern Berkshire towns' assessments would decrease, except for Sheffield's. Sheffield's increase is due in part to the shift from the district's current assessment methodology based on minimum local contribution to one based on FY2022 foundation enrollment.

Capital Assessments

		Scenario 2					
		Low End of Range			High End of Range		
		20 per class, \$50k avg. salary			22 per class, \$70k avg. salary		
Capital	Current	New	Difference	%	New	Difference	%
Great Barrington	\$ 503,160	\$ 1,297,493	\$ 794,333	157.9%	\$ 1,297,493	\$ 794,333	157.9%
Stockbridge	\$ 83,986	\$ 783,392	\$ 699,406	832.8%	\$ 783,392	\$ 699,406	832.8%
West Stockbridge	\$ 90,796	\$ 367,215	\$ 276,419	304.4%	\$ 367,215	\$ 276,419	304.4%
Alford	\$ 23,456	\$ 37,459	\$ 14,003	59.7%	\$ 37,459	\$ 14,003	59.7%
Egremont	\$ 88,556	\$ 86,945	\$ (1,612)	-1.8%	\$ 86,945	\$ (1,612)	-1.8%
Monterey	\$ 85,363	\$ 92,556	\$ 7,193	8.4%	\$ 92,556	\$ 7,193	8.4%
New Marlborough	\$ 153,007	\$ 129,261	\$ (23,747)	-15.5%	\$ 129,261	\$ (23,747)	-15.5%
Sheffield	\$ 373,667	\$ 254,330	\$ (119,337)	-31.9%	\$ 254,330	\$ (119,337)	-31.9%
Totals	\$ 1,401,992	\$ 3,048,650	\$ 1,646,658	117.5%	\$ 3,048,650	\$ 1,646,658	117.5%

Projected capital assessments, which include projected debt for the new high school, show that, each of the Berkshire Hills towns' assessments would increase significantly, due to the burden of funding most of the high school project, and some of the Southern Berkshire towns' assessments would increase and some would decrease, due to the burden of funding some of the high school project and the shift from the district's current assessment methodology based on minimum local contribution to one based on EQV.

Total Assessments

		Scenario 2					
		Low End of Range			High End of Range		
		20 per class, \$50k avg. salary			22 per class, \$70k avg. salary		
Total	Current	New	Difference	%	New	Difference	%
Great Barrington	\$ 17,567,344	\$ 17,657,504	\$ 90,160	0.5%	\$ 17,411,743	\$ (155,601)	-0.9%
Stockbridge	\$ 2,940,563	\$ 3,574,211	\$ 633,648	21.5%	\$ 3,531,790	\$ 591,227	20.1%
West Stockbridge	\$ 3,261,621	\$ 3,339,656	\$ 78,035	2.4%	\$ 3,297,235	\$ 35,614	1.1%
Alford	\$ 464,407	\$ 459,521	\$ (4,886)	-1.1%	\$ 452,306	\$ (12,101)	-2.6%
Egremont	\$ 1,705,566	\$ 1,691,024	\$ (14,542)	-0.9%	\$ 1,661,818	\$ (43,748)	-2.6%
Monterey	\$ 1,651,729	\$ 1,626,705	\$ (25,024)	-1.5%	\$ 1,599,217	\$ (52,512)	-3.2%
New Marlborough	\$ 2,965,391	\$ 2,706,280	\$ (259,111)	-8.7%	\$ 2,662,987	\$ (302,404)	-10.2%
Sheffield	\$ 7,460,682	\$ 7,463,822	\$ 3,140	0.0%	\$ 7,334,628	\$ (126,054)	-1.7%
Totals	\$ 38,017,303	\$ 38,518,723	\$ 501,420	1.3%	\$ 37,951,723	\$ (65,580)	-0.2%

Projected total assessments are the total of the operating assessments calculated and the capital assessments calculated. Projections show that each of the Berkshire Hills towns' assessments would increase with the low end of the range of estimated savings, with only Stockbridge's increasing significantly. Stockbridge's assessment is shown to increase significantly because of the shift from the current assessment methodology based on residential enrollment to the recently negotiated capital assessment shares based on EQV. Projections show that Great Barrington's assessment would decrease with the high end of the range of estimated savings. Projections show that each of the Southern Berkshire towns' assessments would decrease with the low end of the range of estimated savings except

for Sheffield's, but that each of the Southern Berkshire towns' assessments would decrease with the high of the range of estimated savings.

Considerations

There are many ways that communities can refine and adjust assessment methodologies. We have illustrated one set of assumptions/parameters. For example, projected assessments based solely on FY2022 foundation enrollment for operating costs and on 2020 EQV for capital costs showed that some of the Southern Berkshire towns' assessments would increase under Model A, Scenario 2, as shown in the following table:

		Scenario 2					
		Low End of Range			High End of Range		
		20 per class, \$50k avg. salary			22 per class, \$70k avg. salary		
Draft							
Town	Current	New	Difference	%	New	Difference	%
Great Barrington	\$ 17,567,344	\$ 16,910,415	\$ (656,929)	-3.7%	\$ 16,664,654	\$ (902,690)	-5.1%
Stockbridge	\$ 2,940,563	\$ 3,445,256	\$ 504,693	17.2%	\$ 3,402,835	\$ 462,272	15.7%
West Stockbridge	\$ 3,261,621	\$ 3,210,701	\$ (50,921)	-1.6%	\$ 3,168,280	\$ (93,342)	-2.9%
Alford	\$ 464,407	\$ 490,197	\$ 25,790	5.6%	\$ 482,982	\$ 18,575	4.0%
Egremont	\$ 1,705,566	\$ 1,815,188	\$ 109,622	6.4%	\$ 1,785,982	\$ 80,416	4.7%
Monterey	\$ 1,651,729	\$ 1,743,566	\$ 91,837	5.6%	\$ 1,716,078	\$ 64,349	3.9%
New Marlborough	\$ 2,965,391	\$ 2,890,335	\$ (75,056)	-2.5%	\$ 2,847,042	\$ (118,349)	-4.0%
Sheffield	\$ 7,460,682	\$ 8,013,066	\$ 552,384	7.4%	\$ 7,883,872	\$ 423,190	5.7%
Totals	\$38,017,303	\$38,518,723	\$ 501,420	1.3%	\$37,951,723	\$ (65,580)	-0.2%

However, when we apply the school choice tuition adjustment mentioned in the assumptions, the projected assessments change as follows:

		Scenario 2					
		Low End of Range			High End of Range		
		20 per class, \$50k avg. salary			22 per class, \$70k avg. salary		
Town	Current	New	Difference	%	New	Difference	%
Great Barrington	\$17,567,344	\$17,657,504	\$ 90,160	0.5%	\$17,411,743	\$ (155,601)	-0.9%
Stockbridge	\$ 2,940,563	\$ 3,574,211	\$ 633,648	21.5%	\$ 3,531,790	\$ 591,227	20.1%
West Stockbridge	\$ 3,261,621	\$ 3,339,656	\$ 78,035	2.4%	\$ 3,297,235	\$ 35,614	1.1%
Alford	\$ 464,407	\$ 459,521	\$ (4,886)	-1.1%	\$ 452,306	\$ (12,101)	-2.6%
Egremont	\$ 1,705,566	\$ 1,691,024	\$ (14,542)	-0.9%	\$ 1,661,818	\$ (43,748)	-2.6%
Monterey	\$ 1,651,729	\$ 1,626,705	\$ (25,024)	-1.5%	\$ 1,599,217	\$ (52,512)	-3.2%
New Marlborough	\$ 2,965,391	\$ 2,706,280	\$ (259,111)	-8.7%	\$ 2,662,987	\$ (302,404)	-10.2%
Sheffield	\$ 7,460,682	\$ 7,463,822	\$ 3,140	0.0%	\$ 7,334,628	\$ (126,054)	-1.7%
Totals	\$38,017,303	\$38,518,723	\$ 501,420	1.3%	\$37,951,723	\$ (65,580)	-0.2%

The purpose of illustrating the differences between the methodologies used to compile these adjusted assessments is to show that member towns can work together to determine an assessment methodology that ensures Southern Berkshire towns' assessments are held harmless or are reduced, in a fair approach that leads to potential success in an regionalization, regional agreement process.

Next Steps

As mentioned, regionalization is a difficult process and will require high coordination and engagement by the 8 towns. A range of resources has been compiled by the DESE and can be found [here](#), and includes both Massachusetts General Laws and guidance documents. Specifically, a pathway to regionalization, prepared by DESE and MARS, offers an excellent set of descriptive guides that communities can use. Regionalization, while requiring the engagement of local stakeholders, also requires the engagement and ultimate approval of the DESE Commissioner.

As outlined in the work plan and subsequent presentations, Regionalization is broken into two key phases, I & II.

Phase I: Consideration and study of forming, expanding, or enlarging a regional school district.

Step 1. Preliminary Discussions

Step 2. Regional Planning Committee and Regional Planning Board

Step 3. Develop Regional Agreement and Long-Range Plan

Step 4. Submission of Proposed Regional Agreement for Public Review

Step 5: Voter and State Approval

RSDPB is currently in Phase I: Form/Expand/Enlarge a Regional School District, at Step 2. What emerges from Step 1 and 2 is the confirmation of a regional school model (among a range of options) that allows for deeper analysis of the implications (benefits and challenges), with a deeper dive into a variety of functional areas such as finance, student flow, and educational quality – for example, as well as community outreach and engagement that informs the research process.

Ideally, the goal was (is) to equip the RSDPB with enough information to advance into Step 3, where an operations/educational plan and regional agreement (among other things) occur.

- Step 3: Development of an agreement and long-range plan
- Step 4: Submission of Proposed Regional Agreement for Public Review
- Step 5: Voter and State Approval

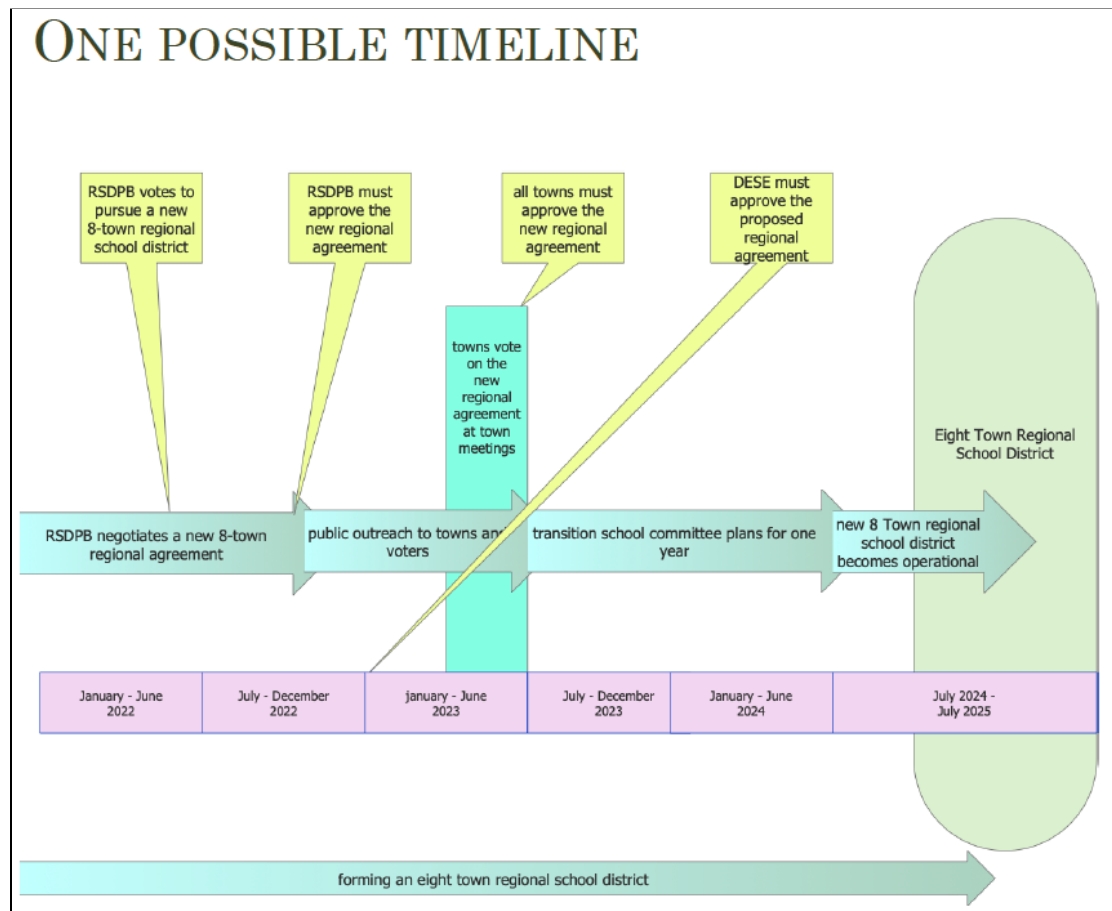
Phase II: Beginning as a new regional school district, with a range of necessary transition tasks such as school committee formation, policy development, subcommittee organization, etc. Below is a list of functional areas that would need to be worked through. These are offered given that they will also serve as key areas to consider in Phase I, Steps 1 and 2 so that a deeper evaluation of models/options occurs, and both benefits and barriers are considered, shared, discussed, and determined in order to better inform the RSDPB, town leaders, and the community-at-large. Functional areas include:

- Technology
- Business Operations
- Budget Development for the First Year of the Region (Including Grants)
- Curriculum and Instruction
- Professional Development
- Staffing for the New Region
- Special Education Region
- Athletics
- Food Services and Custodial Services

- If building a New Building or Renovating and Old Building or a Combination
- Building Usage and Leases
- Transportation
- Administrative Structures

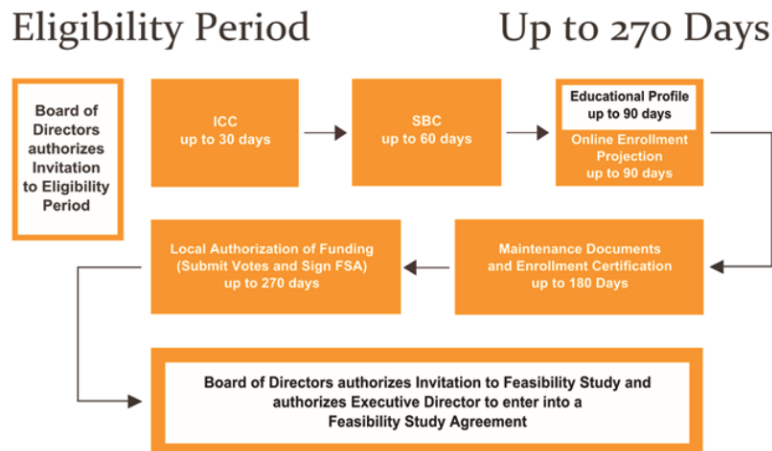
While there is much flexibility in the regionalization process, it is also not an overnight process with various checkpoints and votes along the way. Below, a schematic illustrates and translates the process into a relatively simple form. This schematic, what we would describe as a most ambitious timeline, assumes that if a vote to approve an 8 town region was made prior to December 2022, the Commissioner could approve it in December 2022 and the transition to the new district would be approximately 1.5 years long. During that time, there would be an interim new district school committee formed to manage the transition process while the existing school committee remains in place. At the end of the transition period, based on regional agreement and governance structures, a new committee is formed and assumes operation of the 8 town regional district. The new regional district would become operational in September 2024.

Of course, pushing up the approval and votes could move that back a year (or more).



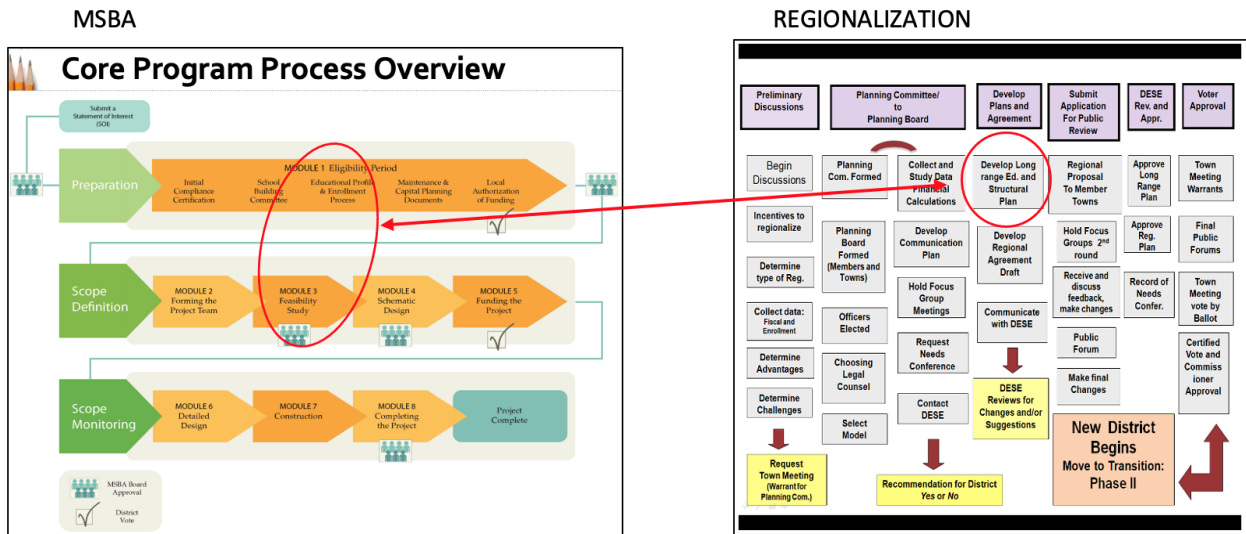
In addition to the regional timeline, there is also an MSBA timeline and we believe these two processes would run parallel and converge. Below is a schematic of the eligibility period, of which BHRSD has been invited into. There are two key elements that include enrollment projections and educational profile.

Enrollment will dictate the size of the school and the breadth/range of programming, while the educational profile will begin a process that informs the design of the building through an establishment of an educational program plan/philosophy/approach. Both will be instrumental to the pre-construction of the project that advances into feasibility. Of note: Eligibility does not guarantee feasibility and work conducted during eligibility will ultimately be reviewed by the MSBA with an invite (or not) into the feasibility phase.



Once in feasibility, the District and its team collaborate with the MSBA to document their educational program, generate an initial space summary, document existing conditions, establish design parameters, develop and evaluate alternatives, and recommend the most cost effective and educationally appropriate preferred solution, leading to a preliminary design and a preferred schematic.

The entire MSBA process is displayed below, alongside a flow chart provided in the DESE regionalization guidance documents. These somewhat overwhelming diagrams are shared for one purpose, that is to illustrate that timelines and activities for both processes overlap. Namely, the development of an educational profile/program plan will need to happen for both processes and this moment provides a unique opportunity that planning/visioning teams across the 8 towns could engage in this effort collaboratively.



Logical Next Steps

Our team does not presume to answer all of the questions needed to form a new regional district. There is much work ahead. However, we believe if this recommendation is chosen, several things can/should occur.

1. **Educational Visioning.** An educational visioning and planning process should occur and involve representatives from all 8 towns. This should include facilitation from educational planners, lead thinkers in the field of contemporary education, and skilled facilitators. Additionally, teams should engage with school visits and exploration of alternative/innovative models as are occurring throughout the US and world. Learning and drawing from these approaches will further inform the educational visioning process.

We anticipate this process will be funded through the support of DESE, the MSBA, foundations such as Barr, and local contributions. The process could occur over 4-6 months and should emerge with a concrete education vision and program plan for the new high school that can be vetted with the broader community.

This work should be coordinated with the CVTE study and advisory effort (below) to ensure alignment with other academic programs and/or middle grades.

2. **CVTE Visioning.** The team provided a menu of possible CVTE programs based on interest, regional workforce/economic development, identified areas of need, existing programs, and potential partnerships. However, this list of 10 programs is more than a 700+ student high school can support. This was intentional in that we believe the community and a range of key stakeholders need to make this final decision. Thus we believe there is a need to:

Engage the CVTE Program Advisory Committee in developing guidelines and a process through which a final set of CVTE programs (ideally 6-8) can be identified. This should include industry and workforce/economic development leads, school staff, students, employers/local businesses, and parents. This will extend the work of our research team in considering student/community

interest, workforce needs, space and equipment requirements, industry partners, and enrollment.

Conduct a CVTE enrollment analysis. This will be determined by the number of towns participating, including the 8 towns and/or additional communities who seek to become part of the CVTE center through formal tuition agreements. Surveys of student interest can help to, additionally, inform potential enrollment levels in particular programs.

Study and secure leadership/consultants to support new Chapter 74 program approvals. This should be done in partnership with DESE, which has a detailed process, described here. The DESE describes, generally, steps as:

- Formation of an advisory committee
- Research and analysis of labor market demand
- Consultation with CVTE schools that are running programs in close proximity
- Examine schedules, standards, field work, and staffing - for example.
- Conduct formal outreach to neighboring south county districts to explore CVTE tuition arrangements as related to enrollment, revenue, and program needs projections
- Complete more detailed fiscal analysis of CVTE programs
- Engage with advocacy and professional groups such as the Massachusetts Association of Vocational Administrators to build peer relationships and networks in order to learn from these schools and individuals who can serve as advisors, mentors, and resources as the RSDPB planning process

3. **Regional Agreement/Governance.** Use the RSDPB or form a subcommittee to begin the process of formation of a new regional agreement. This is a necessary step that will be required in advance of a community vote and/or DESE approval. This committee will look at a variety of topics including:

- Legal and regulatory issues
- Contracts
- Finance and Assessments
- Capital and Legacy costs
- Composition of a transition school committee

[SBRSD Regional Agreement](#)

[BHRSD Regional Agreement](#)

4. **Conduct Additional (Deeper) Analysis.** In this phase outstanding questions will continue to be explored, debated, and answered. Our research team, as we've reinforced throughout this brief, went far enough with the goal of equipping the board with enough information to select a preferred direction/model/scenario. However, much detail work still remains, and will remain to and throughout any regionalization process. There are key areas that do warrant additional study.

- **Transportation.** As stated in the transportation brief, a more detailed analysis of both travel times and costs associated with the preferred model (in this case all grade 9-12 students attending school on the Great Barrington campus) must occur. Our analysis included support from Marie Massini (for which we are grateful) based on approximate

ride times and existing equipment. Additional study is needed. There are potential groups (Walker Partnerships, R. Labrie, Transfinder) that may have potential resources.

- **Special Education and specialized services.** Our analysis did not include a deep dive into the specific utility of special education staff (teachers, paraprofessionals, specialists, counselors). A special education report available [here](#) outlines some broad patterns and trends and may offer some insights into how special education services might be reconfigured in a K-12 single region district. Additional analysis and planning could be used to audit/examine staff roles, responsibilities that lead to consolidation and efficiencies, as well as expanded services and programs.
- **Operations.** While we conducted a brief IT overview with broad considerations available [here](#), additional research, additional cost analysis, utility of staff, outsourcing, and processes could be conducted leading into a single K-12 region. Additionally, food service and facilities management could also be examined for potential regionalization/consolidation savings.
- **Finance.** While our finance analysis included parameters based on assumed research ranges, these must be further discussed as specific operational and educational decisions are made. These will lead to more precise figures that help to gauge the impact of position consolidation, impact of benefits and unemployment, operational costs, and certainly capital costs as the high school project (design and budget) progresses. Additionally, we believe a close examination of tuition costs to non-operating districts is needed to bring tuition levels closer to actual per-pupil expenses. Regionalizing may offer an opportunity to reset this relationship with sending towns. If tuition costs were, for example, raised from the current \$9500 average to \$12,000 (still considerably below per pupil costs) additional revenue of about \$225,000 would be generated.
- **Policy.** There are particular policies that will need to be developed, with specific questions pertaining to intradistrict choice. For example, the K-12 will need to set policies/rules/parameters pertaining to intra-district school choice. These will be necessary to clarify when, to whom, and where transportation will be guaranteed, or not. A sample intradistrict choice policy can be found in Appendix II of the [Buildings and Capital report](#). Additional policies for both existing districts must be reviewed in preparation for updated policies in the new district.

While our preferred Model/Scenario offers a number of significant challenges and much to do in order to realize, it also offers a significant benefit to students today and into the future, as well as the community at large. This generational project will define the southern region of the Berkshires.

Plan B Recommendation, the Backup.

The Research Team recommends Model C (modified Scenarios 1 and 2) as a set of secondary options.

Expand, through formal agreements, shared services between BHRSD and SBRSD. Optionally, explore formation of an Educational Service Agency/Coalition.

Advantages:

- **Easy to Do.** Shared services are (comparatively) easy to do and are often conducted outside of the sight of governance structures as superintendents, business administrators, and special education directors strike both formal and on-demand deals to deliver shared service solutions across district lines. Shared services can be elevated to school committee level agreements across towns when more complicated and significant decisions to share administration or large operational units (for example food service) are considered.
- **No limitations.** There is really no limit to shared services. The comprehensive lists of possibilities provided throughout this brief suggest that shared services can include all aspects of district functions from direct services and programming for children, to shared operational functions and staffing.
- **Form of incremental change.** Shared services can be used as a form of incremental change to allow districts to ease into more significant collaboration and merger options. The ability to share services is bound only by the willingness across districts to engage with each other in developing, managing, and sustaining this wide range of shared services possibilities.
- **Flexibility with maintained autonomy.** Shared services have a high degree of flexibility, allow districts to remain autonomous with limited disruption to the status quo, and allow service delivery to remain close to the schools with retention of operational control at the district level. There is likely much less political opposition to shared services, often the compromise position in regionalization talks between communities when merger prospects become unrealistic politically.
- **Builds upon current efforts.** There is evidence of successful regional shared services, historical and ongoing, that can be drawn from and scaled. A full list of potential value propositions related to shared services is outlined throughout this brief, with a listing of current efforts on pages 6-10. Shared services have, and will likely continue to, have a regional impact regardless of whether the 8 Towns choose to maintain existing districts or to fully regionalize.

Disadvantages:

- Shared services are **not durable** and the history of efforts demonstrate this. While many easy-to-accomplish and/or established shared services such as the Berkshire Health Group, cooperative sports, or food service bids exist, the ability to examine larger systems (such as IT, shared staffing, shared courses, and professional development) have been discussed, in some cases attempted, but rarely sustained.
- Shared services often **rely on existing staffing** to absorb additional duties without alignment of systems or recognition of time needed to absorb these responsibilities. For example, sharing a business manager within two accounting systems and two collective bargaining agreements lacks the system's efficiencies that result in an undue burden on the manager.

- Shared services have **limited opportunities to highly leverage economies of scale** and efficiencies necessary to realize substantial savings. This is often due, as mentioned previously, to systems that are out of alignment and, as a result, have a high degree of duplication of tasks and staff.
- Shared services are **difficult to sustain** given that managers must establish relationships and trust in order to act innovatively. When these managers cycle in/out of roles, the rationale and leadership support for these shared service arrangements can erode.
- Shared services are often **voluntary**, thus when there are questions of funding, efficacy, or leadership, a shared service arrangement can be quickly dropped by one of the member districts. As voluntary, they also can be selected as useful, or not, and districts can select in/out of shared services opportunities, leading to inconsistent cross-district (network) participation.
- Shared services often **nibble at the edges**, improving public opinion/optics (demonstrating that districts work together) but not leading to substantial opportunities resulting in better and more consistently aligned systems, and equal opportunity and access for students and staff.

We suspect that Expanded Shared Services will be an attractive solution/recommendation for the RSDPB, 8 Town effort in that it avoids the complex, emotionally charged factors associated with politics, town/district culture and identity, legal, and the many challenges associated with merging two (regional) systems. A call for expanded shared services, as has been the case in past regionalization efforts in south county and across the state, will likely be made. While we do **not** believe that this will go far enough in yielding an alignment of systems in a way that generates the most significant educational and fiscal value, it can be considered a positive step in the right direction.

At the same time, we remain critical of planning processes that over-promise significant shared services, and under-deliver on these plans. As such, we believe that many questions will need to be considered, such as:

- What shared services have been historically offered in BHRSD, SBRSD and Berkshire County?
- What shared services are currently offered in BHRSD, SBRSD and Berkshire County?
- Among shared services regionally and in the literature, what are the most promising options?
- What shared services make the most sense as potential candidates? *Note: The Hanover Decision-Making Process for Shared Services offers an excellent framework.*
- How can organizational/legal structures/agreements be developed to ensure shared services are durable, invested in by both parties, and evaluated for effectiveness?
- Could other districts be included in potential expansion of shared services?
- How will the 8 towns formalize a commitment from partner districts?
- Where are there both early easy wins and longer-term, more structural wins, for shared services across the 8 towns?
- How would 8 towns engage communities and key stake-holders to support shared services?
- Who will work on/develop/lead this project?
- How will 8 towns drive and gauge progress on process steps towards benefits?
- What financial resources are available for this effort to support research, agreement development, start-up, and ongoing management?
- What are some foreseeable challenges? How will the 8-towns meet these challenges?
- What is the plan for long-term sustainability of these shared services agreements?
- Are there particular human resource and operational needs required to support shared services possibilities?
 - Programming, access, and services

- Evaluation on how the shared services impact faculty/staff in terms of networks, professional culture, and training
- An evaluation of existing shared services for continuation (or elimination), and potential new shared services for piloting and/or implementation.

These questions will facilitate transparency and a clearer understanding of what shared services are ongoing, whether they are effective (or not), and if there are potential areas of expansion. They offer a starting point for the RSDPB and the community to understand current and future possibilities. However, we believe that firm commitment towards shared services is needed. While the often taken approach to shared services is to start small and work bigger, we propose the opposite. We suggest the two districts commit to two **bold** steps towards expanded shared services, rather than tinkering with an ongoing planning process as has been the case in past efforts. We propose that the following occur over the next 12 months:

1. **Full alignment of the school calendars (K-12) and high school bell schedules (9-12)**
2. **Commitment to consolidation of at least one operational system (i.e. IT, Food Service, Facilities)**

We assert that these two actions, while not easy, will test the willingness of both communities to commit to more intensive shared services arrangements. Each can be rationalized in that alignment of a school calendar and schedule can lead to shared professional development (districts have planned PD time on the same days), shared staff within a parallel calendar/schedule, and shared courses for high school students. Consolidating one operational system would press the two districts to carefully examine (and experience) where systems do or don't match up and where the challenges lie with consolidating a particular operational unit (such as food service, facilities, or technology).

In order to facilitate this, the following could be used to launch a process:

- Districts would commit to the formation of a cross-district shared services subcommittee (a management model). This group will meet quarterly to research, develop, plan for, implement, evaluate, and report on shared services across the two districts, including:
 - Needs assessment using key data and guided by questions posed above
 - Determination of shared services scope, scale, and service portfolio
 - Determination of budget, staffing, space
 - Examine historical effort in terms of what did, has, is or isn't working in terms of shared services
 - Interview, study, and learn from existing partnership/coalition efforts such as 5DP
 - Launch shared service-action teams to examine specific shared service solutions (by role and area of expertise)
- School committees will formalize the Shared Services Subcommittee through adopted district policy with a commitment of 5 years.
- School committees will commit to startup funds to support early efforts.
- Secure necessary expertise/consultant and legal expertise (ongoing) to guide the early committee efforts.
- Launch two immediate shared service action teams to:
 1. Study and make recommendations for alignment of the school calendars and high school bell schedules

2. Study the various operational areas and make a specific recommendation to consolidate at least one operational unit

- Additionally identify the best options and areas for ongoing shared services expansion, prioritize and establish a timeline for study and potential implementation.
- Have a systematic reporting structure, with benefits tracking, back to member school committees/districts.
- Phase shared service activities over time and engage in a continuous cycle of evaluation, feedback and continuous improvement as/if shared service activities are to be scaled up.

Additionally, we recognize that a formal collaborative, as evaluated in this brief, is unrealistic. However, the RSDPB could consider the formation of a less formal *education service agency/consortium* through expanded partnerships regionally via existing coalitions. Potentially, a cross-district planning team could be formed to shape this effort. Members could include representatives from:

- Berkshire County Superintendents Roundtable
- Region #6, Massachusetts Association of School Committees
- Berkshire County Business Administrators
- MTA regional representation
- Leads from BERK
- Leads from local colleges

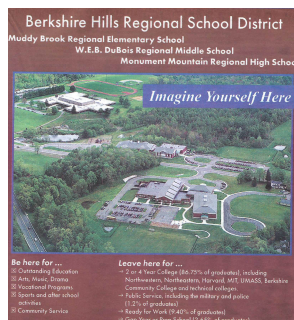
This group could proceed through a planning process in which they:

- Examine historical effort in terms of what did, has, is or isn't working in terms of shared services
- Examine functions of historical and existing coalitions/consortiums such as the Berkshire Compact, Readiness Centers, the Superintendents Roundtable, and BERK
- Interview, study, and learn from existing partnership/coalition efforts such as 5DP
- Identify the best options and areas for coalitions (such as professional development, shared courses, out-of-school time, shared staff - etc.)
- Sketch out an organization structure (that could include an existing organization as host/backbone) that includes staffing, function, oversight/governance, space, legal structures, finance
- Establish priority shared services projects and a realistic timeline
- Have a means to track benefits
- Have a systematic reporting structure back to member school committees/districts
- Phase activities over time and engage in a continuous cycle of evaluation, feedback and continuous improvement as/if shared service activities are to be scaled up
- Include a plan for engaging and communicating with stakeholders

While our team does not believe that shared services will accomplish and offer the operational, fiscal, and education benefits that K-12 regionalization will yield, it is a step in the right direction. We assert, however, that shared services require a commitment, appropriate organizational structures, and a mechanism for review and evaluation. Without these, they are not consistent or durable.

Pre-Closing Note:

As we close out this brief, we share a closing concern regarding the prospect of continuing forward with an “as is” model. We recognize the genuine collaborative spirit and the willingness of each district to rally for the other in times of need. However, we also believe that ongoing student enrollment constraints will drive a level of competition for students into the future.



A full page promotional ad by BHRSD (as well as other Berkshire districts) recently in the Berkshire Eagle speaks to this. This competition will only be accelerated (we believe) when BRHSD builds a new high school with or without SBRSD. Moreover, constrained resources (and an impending federal stimulus cliff) will limit opportunities to develop, manage, and ensure students have access to a wide range of educational programs and resources. Similarly, ensuring that faculty/staff are fully resources and supported through training and mentoring, building a solid professional culture and network - will be challenging as numbers drop. The ability to align systems and approaches (administrative, operational and educational) will be challenged, and less

efficient and developed, in a two-district model. Finally, how schools are financed, recognizing that costs are rising as state aid remains flat, will be strained.

These factors lead us to believe that alternatives offered in this brief, or those still yet to be determined as hybrids of these ideas or new ideas altogether, are needed in order for the 8 towns to successfully navigate the future of K-12 education in south county.

Closing.

We (our team) believe there is great potential for solutions between BHRSD and SBRSD that unite the 8 towns in educational purpose, efficacy, and efficiency. We have no doubt that the educators, school committees, and invested community members recognize the value of the highest quality education as necessary for a thriving community. Moreover, we know (having interacted with many of you) that you care deeply about your children and want each to have an exceptional educational experience that offers a range of options to explore and be prepared for their future.

I (Jake) have five children who have all benefited from a public education. My last two (twins) graduate from public school this year. I was once asked what I hoped for in my own children as someone who has worked a good portion of his professional career in public education. To be honest, I fumbled with the reply offering something relatively simple. However, this question remained unsettled in my head and it wasn't until months later as I sat with a panel of educators developing a collective vision of what we hoped for all graduates that this question came into focus. We aspired that our graduates (our children):

- Felt valued, respected, and heard
- Played an active role in their own learning
- Engaged in learning that challenged them to be their best
- Explored and developed their individual talents, abilities, and interests
- Discovered new things about themselves and were surprised by what they could do
- Learned how to get involved in their communities and how to make positive change
- Felt prepared, ready, and confident about the next phase of their lives

I offer this reflection with recognition that across the 8 towns, this is what you also seek (we suspect) for your children, your neighbors, and your students.

Both districts are working incredibly hard to deliver a comprehensive and quality program for their students despite the challenges of shrinking enrollment and stretched resources. And they are innovating in ways unique to each. While shared services have been and will continue to be a part of achieving that aim, as they are now, achieving a scale that allows the continuation and expansion of educational programs within fiscal parameters will require more than has been done historically. Shared services as they have been simply don't go far enough.

Our team also recognizes the significant barriers associated with mergers and regionalization such as legal and regulatory hoops, emotional challenges related to identity and culture, and potential loss of local control. Yet it holds significant promise. Regardless, our team recognizes, *and emphasizes*, that

the ultimate decision will be made by YOU (the RSDPB and the towns/citizens).

We also recognize that we have not answered all questions, and this iterative process will require ongoing intelligence, analysis, discussion, debate, and adjusted priorities. To the degree that we can offer value and are needed, we pledge an ongoing commitment to answering your questions pertaining to the Models/Scenario presented, as well as alternatives. As such, we continue to encourage constructive feedback that includes critique, commendations, and ongoing questions or suggestions that help us to extend and improve this analysis.

Respectfully,

H. J. Eberwein, Project Manager

Appendix I. Opportunity Inventory

This document is also available [here](#).

Modified by HJ Eberwein for RSDPB, March 2022							
Originally created for SBEF , February 2018							
Opportunity Inventory							
"Why" Domain							
Goal			Importance (priority) Scale				
	BHRSD	SBRSD	High			Low	
Increase educational opportunity, quality, access, and outcomes			5	4	3	2	1
Control financial impact to communities			5	4	3	2	1
Uniquely brand our (sub) region to increase residency/economic development			5	4	3	2	1
"Challenges" Domain							
Challenges/Considerations (General and specific)			Agreement (priority) Scale				
	BHRSD	SBRSD	Yes			No	
Declining enrollment			5	4	3	2	1
Increasing costs			5	4	3	2	1
Access and Equity			5	4	3	2	1
Collective bargaining agreements cross district			5	4	3	2	1
Local control and governance consideration			5	4	3	2	1
Finance formulas and equity across towns/districts			5	4	3	2	1
Capital debt and future needs			5	4	3	2	1
Community identity			5	4	3	2	1
School buildings (potential closing and/or repurpose)			5	4	3	2	1
Staffing (reconfiguration and/or possible reduction)			5	4	3	2	1
Managing choice			5	4	3	2	1
Shifting needs			5	4	3	2	1
Constrained resources (flat state aid, limited local assessment/contribution)			5	4	3	2	1
Limited opportunities for students (as enrollment declines)			5	4	3	2	1
Limited capacity (for smaller districts) for support resources (specialists, organizational infrastructure such as HR, data/reporting, building management , etc.)			5	4	3	2	1
Limited access to range (breadth) of programs (arts, vocational, AP)			5	4	3	2	1
Staffing needs (high demand licenses, impending retirement wave)			5	4	3	2	1

"Opportunities" Domain								
			Ease/Impact Scale					
Opportunities (benefits):	BHRSD	SBRSD	Easy/High				Hard/Low	
Aligned IT systems (purchasing, student management, data, storage/records)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
General IT/computer technology management (hardware, software, staffing, tech support, training)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Aligned purchasing (some occurring - increase in areas such as busing)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Shared professional development (limited capacity by grade/license/content area)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Shared curriculum development (texts, programs, instructional systems). Curriculum alignment.			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Shared assessment systems			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Joint specialized programs (special education)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Joint specialized programs (emotional disability)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Joint specialized programs (alternative education)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Joint specialized programs (vocational)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Access to shared course work for students 6-12 in areas where enrollment is low, such as specials			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Access to shared course work for students 6-12 in areas where enrollment is low, such as gifted and talented education			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Access to shared course work for students 6-12 in areas where enrollment is low, such as AP/dual enrollment			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Blended/online courses – developing a shared learning management system			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Dual enrollment courses in concert with MCLA/BCC/Westfield			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Organization of education-to-career pathways, connecting activities (connection to local employers). Career Awareness, Exploration, and Immersion (internships) activities. Community-work connection. Innovations related to career options.			5	4	3	2	1	Ease
			5	4	3	2	1	Impact

Pathways for non-college/career			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Exploration of emerging pedagogies such as competency based, design thinking/problem-based, thematic and interdisciplinary approaches, badges and certifications. Applications of innovations in education.			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Compliance training (state requirements, right-to-know, evaluation, SEI, etc.)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Shared staffing (teachers and support) including counseling, safety nets, school psychology - low incidence.			5	4	3	2	1	Ease
								Impact
Expanded early childhood programming (early-K, pre-K, K)			5	4	3	2	1	Ease
								Impact
Grant writing and entrepreneurship			5	4	3	2	1	Ease
								Impact
Program evaluation			5	4	3	2	1	Ease
								Impact
Adult education and consumer programming			5	4	3	2	1	Ease
								Impact
Access to co-curricular programming (clubs and activities) cross district such as robotics, theater, band, social justice, etc.			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Social Emotional needs of children—counseling and evaluation services			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Transportation			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
New languages such as Chinese			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Support efforts to expose students to diversity beyond their experiences in South County, including World Education Alliance and Great Barrington Rotary exchange programs abroad as well as exploring sister school programs with more diverse communities in the region and in the state to provide more awareness			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Expanded partnerships with local agencies and organizations (DA, United Way, etc.)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Middle school structure			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Maintaining successful programs (scaling?)			5	4	3	2	1	Ease
			5	4	3	2	1	Impact
Improved safety nets			5	4	3	2	1	Ease
			5	4	3	2	1	Impact