

PHASE II SUSTAINABILITY STUDY

Mohawk Trail and Hawlemont regional school districts

April 2024

A photograph of a tree trunk in a forest, heavily infested with numerous small, light-colored, shelf-like fungi. The fungi are arranged in vertical columns along the trunk, with some overlapping. The background shows a dense thicket of bare, brown branches, suggesting a late autumn or winter setting. The lighting is natural, highlighting the texture of the bark and the delicate structure of the fungi.

WELCOME, THANKS & INTRODUCTIONS

AGENDA

Overview of Charge
About BERK12
Work Plan
Resources/Steering Committee
Prompts & Follow-up



CHARGE.

Support ongoing study and analysis of the operating and organizational structures of the two Regional School Districts



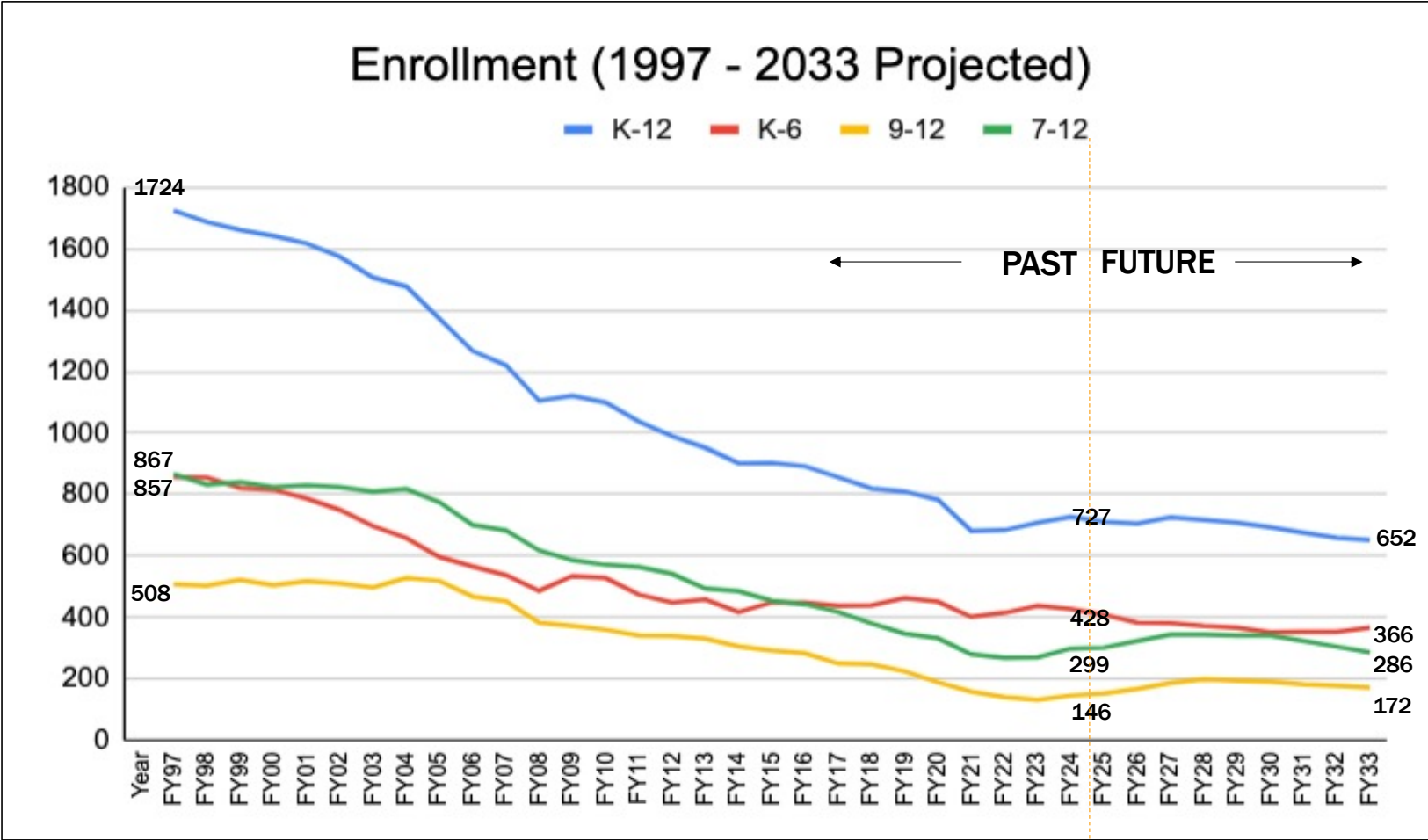
THE CHALLENGES.

Our region, like many rural areas across the northeast, faces educational and fiscal challenges associated with:

- declining enrollment,
- rising operational costs,
- relatively flat state aid, and
- increasing needs of our student body.

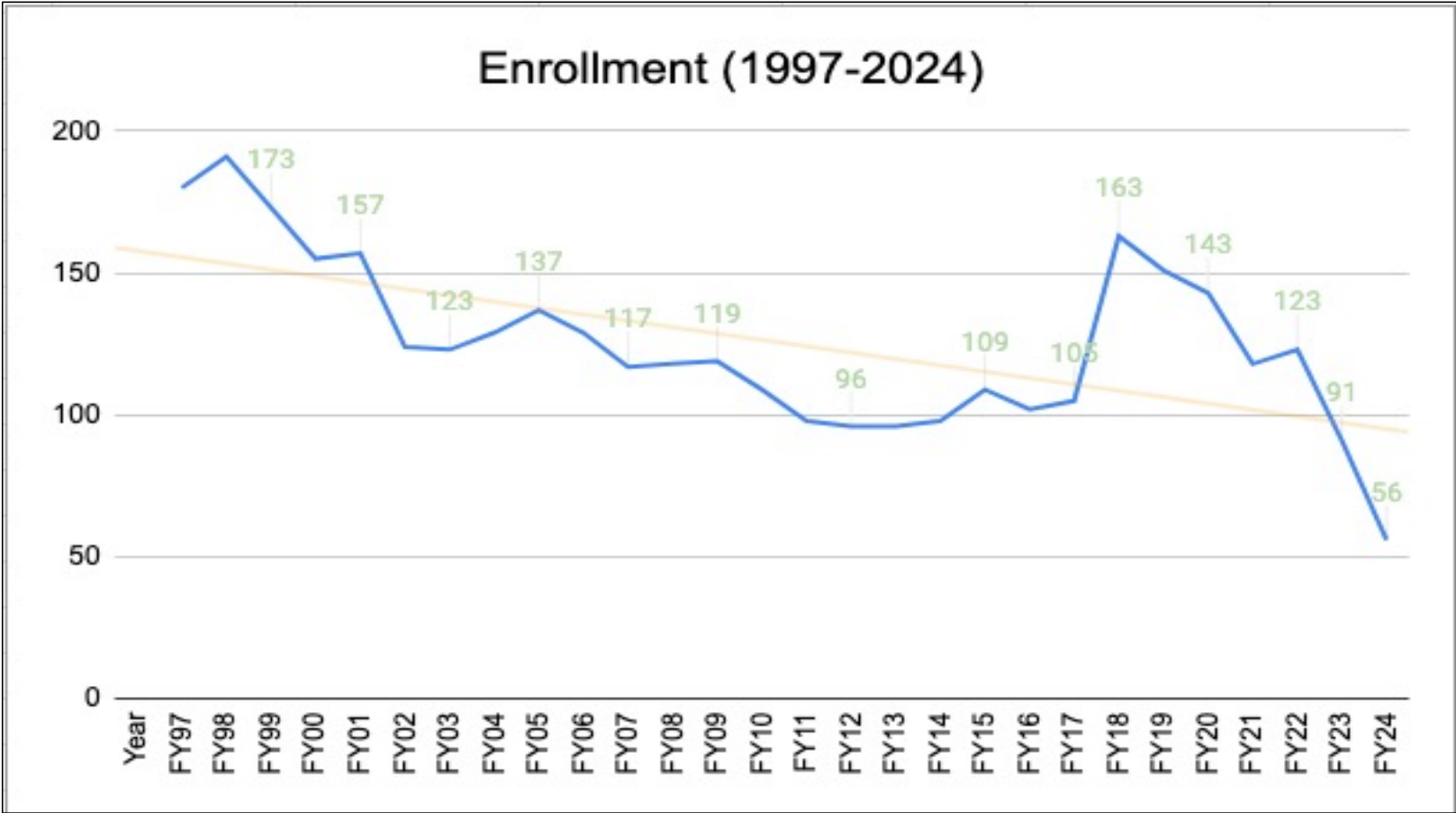
We must continue to explore options and opportunities - in light of these challenges - to ensure our students receive a **high-quality set of educational experiences** (academics, co-curricular, services and supports) they need to ensure success in college, career and life.

MOHAWK TRAIL RSD

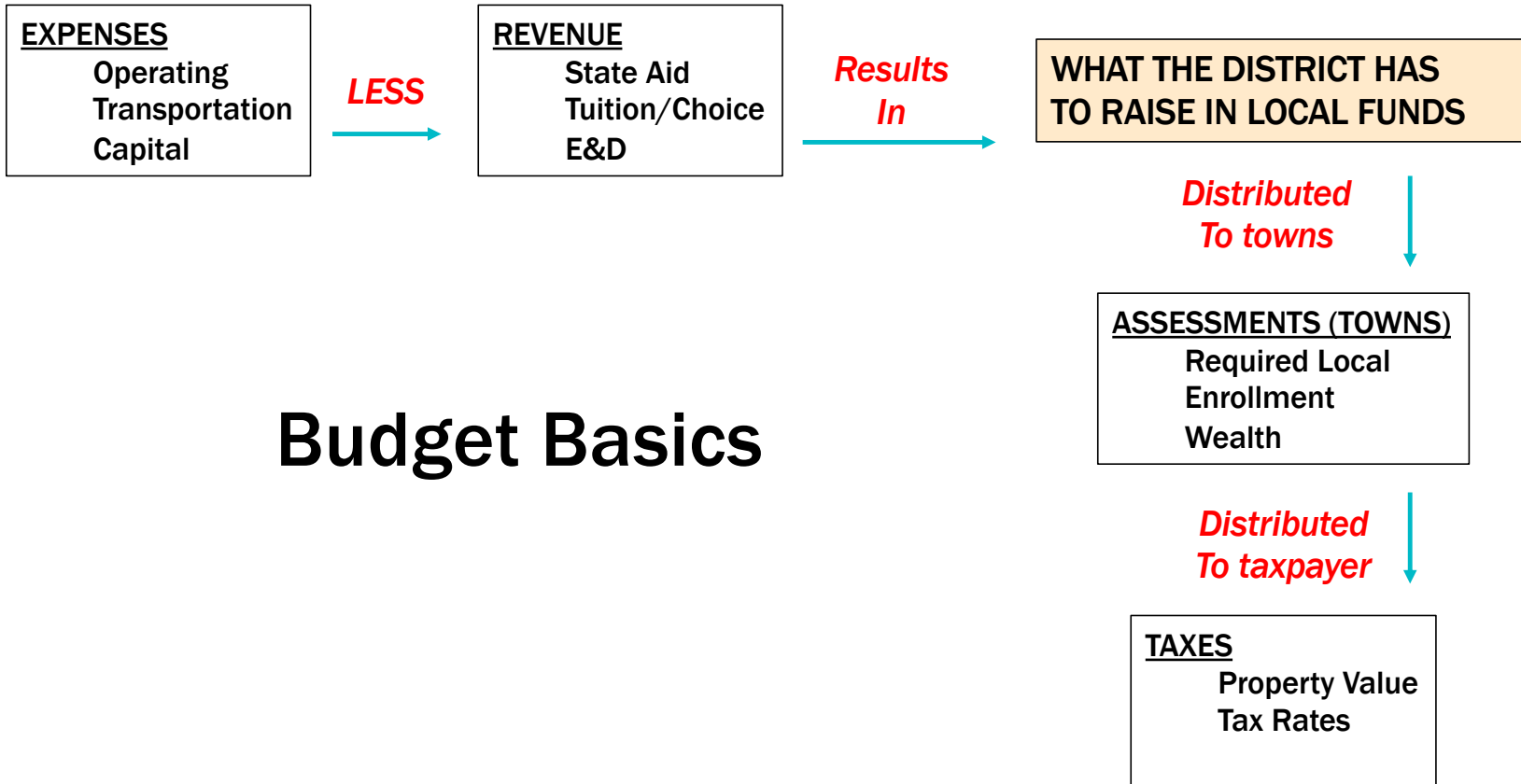


SOURCE: DESE, MARS/NESDEC

HAWLEMONT RSD



SOURCE: DESE



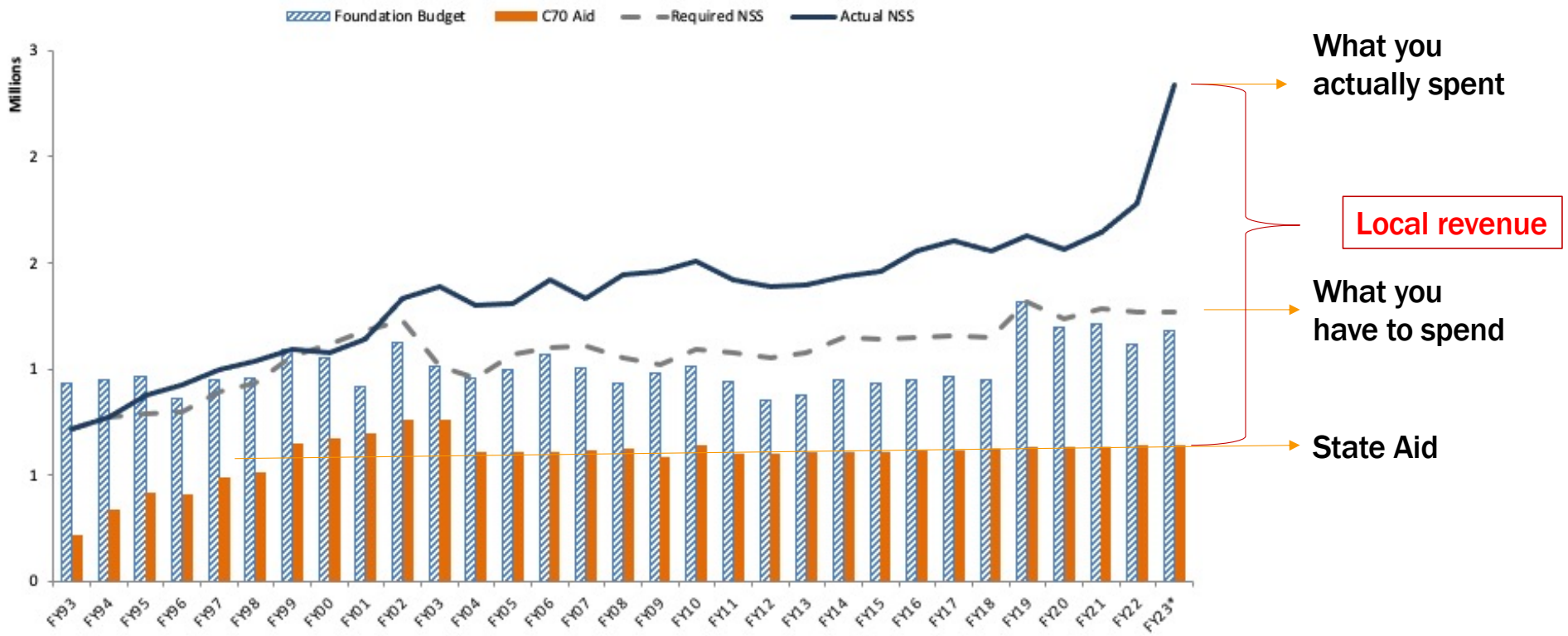
Budget Basics



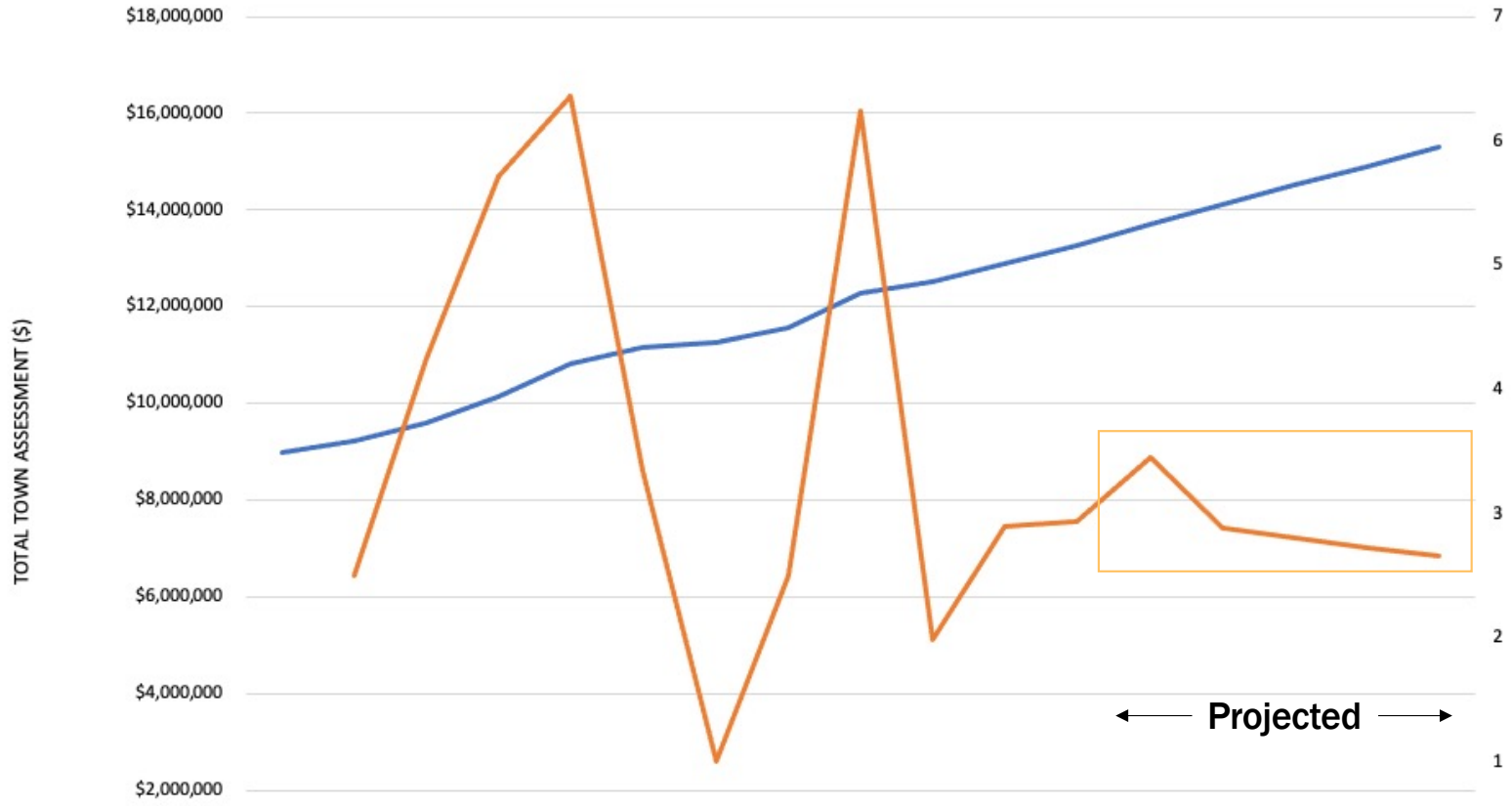
Massachusetts Department of Elementary and Secondary Education Chapter 70 District Profile

7/25/23

0685 Hawlemont



TOTAL TOWN ASSESSMENTS (FY13-FY29) TOTAL/% CHANGE



	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
— Total Town Assessments	\$8,988,4	\$9,213,1	\$9,604,	\$10,153	\$10,799	\$11,161	\$11,273	\$11,555	\$12,276	\$12,519	\$12,883	\$13,261	\$13,718	\$14,115	\$14,512	\$14,908	\$15,305
— % Change		2.50	4.25	5.72	6.36	3.35	1.01	2.50	6.24	1.98	2.90	2.94	3.45	2.89	2.81	2.73	2.66

ABOUT US.

We bring school and community partners together

Our mission is to support school districts, educators, and community partners by collaboratively offering solutions to short and long-term issues, in order to promote, sustainable, high quality public education - which all children deserve, regardless of background or circumstance (including where they live).



BERK₁₂

Berkshire Educational Resources K12

ABOUT US, WHY.

In light of *declining enrollment and stretched resources* (people and dollars), we believe that connecting partners is imperative to improving student outcomes and the social, cultural, and economic conditions throughout rural regions.



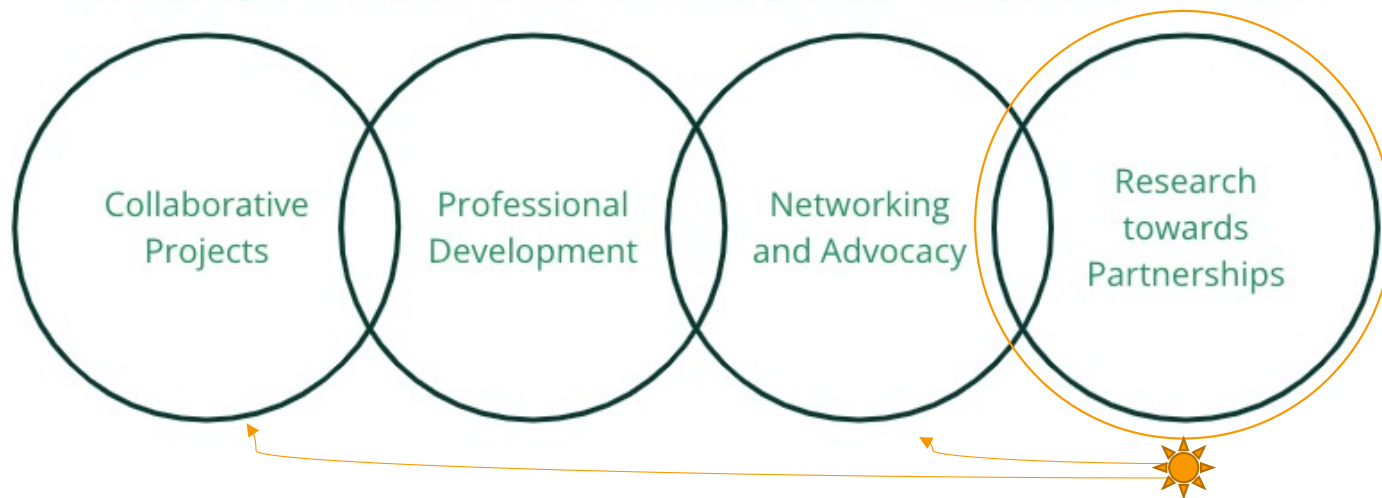
BERK₁₂

Berkshire Educational Resources K12



ABOUT US, WHAT.

We bring educators & community partners together through:



OUR APPROACH.



BUILDING UPON PRIOR WORK.

- Interim Planning Committee (2007)
- Potomac Reports (2013)
- Long Range Planning Committee (2015)
- BEST Study (2016/2017)
- Jetzon Data Presentation (2022)
- Phase I: MARS (2023)



Long-term sustainability plan (obstacles, observations, options)....**foundation for developing specific strategies** to make the district sustainable.

OUR AIMS.

We believe the aim of the Phase II study, the deliverable, is to clarify the current state of the district, to project into the future, and to generate viable alternatives/solutions that result in a sustainability plan that is actionable and will be supported by community stakeholders.

1

Analyze data as provided in Phase I

ANALYSIS

2

Project enrollment, finance, educational factors, and buildings in developing alternative options/solutions (regionalization, consolidation, other possibilities)

PROJECTION

3

Assist a community group representing the 8 towns to determine the impact of doing nothing (*status quo*) as well as study, consider, and evaluate possible alternatives

OPTIONS

4

Refine options that ensure high-quality educational delivery that are fiscally sustainable

MODELING

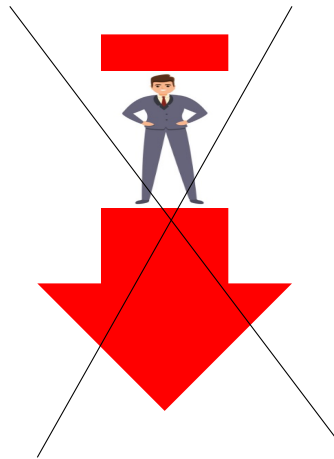
5

Create and lead a communications/engagement plan that ensures a consistent stream of information and affords for broad public involvement

ENGAGEMENT

ASSET-BASED APPROACH

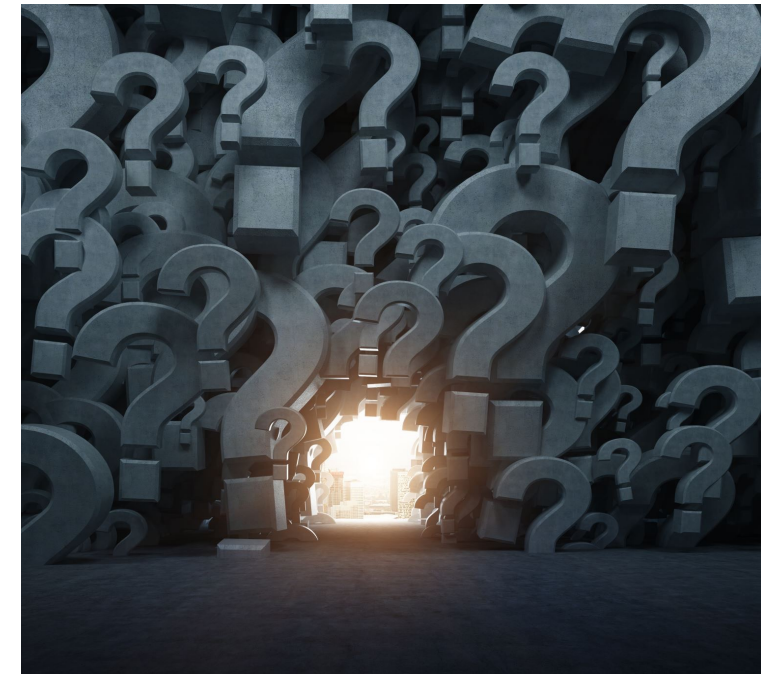
Mobilize the **energies, talents & perspectives** of local communities to develop the innovative, sustainable solutions needed to advance educational excellence for all students across rural regions.





DOMAINS.

- Project Management
- Educational Quality
- Finance
- Operations/Facilities
- Personnel
- Community Engagement
- Legal/Regulatory
- Advocacy



IS (ARE) THERE A SOLUTION (S)?

OUR PLAN.

CONTEXT

Stage 1. Process Organization, Context Setting, Community Engagement (A)
Target dates: January 15, 2024 through close of school, 2024 (spring)

OPTIONS

Stage 2. Deep Data Dive & Analysis, Option Generation
Target dates: June 1, 2024 through Sept 1, 2024 (summer)

MODELING

Stage 3. Preferred Models, Community Engagement (B), Final Report/Next Steps
Target dates: Sept 1, 2024 through February 15, 2025 (fall/winter)

Final Report Delivery: SPRING, 2025



Future Town Actions

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

1. Setup
2. Initial Community Outreach
3. Historical/Literature Review
4. Launch Data Collection

1. **Key Stakeholders:** Following site visits, schedule meetings with established groups such as staff, PAC/School Council, union leads, select boards/finance committees. Use question protocol to collect perspectives, early thoughts/ideas, aspirations/opportunities, challenges, and non-negotiables.
2. **Community Survey:** Develop a community survey to be distributed electronically through school/community listservs. Aggregate data.
3. **Website:** By close of Stage 1, launch a website and establish social media (FB/IG) presence. Curate mailing lists and mechanisms for public submissions.
4. **Develop communications plan:** In concert with PM and Committee, draft a communications plan for 12 months forward, by the close of Stage 1.
5. **Press/Update:** Jointly develop press release/updates to send to stakeholders as part of monthly outreach.
6. **Delegates:** Meet with the local delegation to review aims of the Study, seek input and support, and build a foundation for advocacy.

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

1. Setup
2. Initial Community Outreach
3. Historical/Literature Review
4. Launch Data Collection

Using specialized consultants, organize and launch a process to begin a deep dive into a number of functional domains with the aim of establishing a deep understanding of the current state of the district. In doing so, options explored in Stage 2 & 3 can be evaluated for impact (the value proposition) within each domain. Note: a particular emphasis will be placed on finance, educational indicators, and buildings.

1. **Enrollment.** Review NESDEC, update enrollment projections independently, examine student flow (choice/tuition).
2. **Educational Quality.** Use school/district review protocol when meeting with key district leaders, reviewing plans, examining outcomes, cataloging programs, services and supports, student activities, specialized programming (special education, ELL, alternative education, career education), etc.
3. **Finance & Operations.** Build a model for budget projections (revenue and expenses for both operating and capital based on actuals) that can be manipulated based on varying options, examine select operational systems (facilities, food, technology) as time/funds allow.
4. **Personnel.** Establish clarity of organizational charting, roles/responsibilities, assignments (load), longevity, salary/benefits, etc.
5. **Buildings.** Advance MARS work in clarifying physical plant needs, capacity, appropriateness of educational spaces.
6. **Contracts/Agreements.** As is useful towards understanding the present and future state of the district, review contracts and regional agreement to establish key considerations.

...AS WE PARTNER

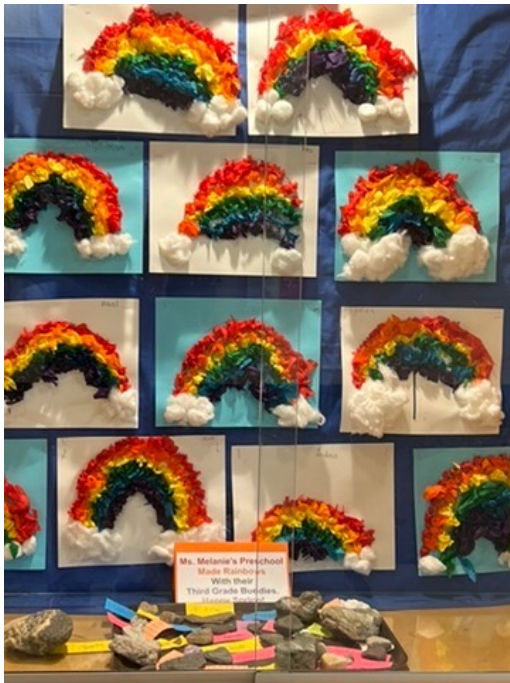
adapt.flex.adjust.



PROGRESS

PROGRESS	TASK
Done, ongoing adjustment	Project Planning: Work with the leadership team/committee to define the work plan, priorities, any remaining questions, consulting team, and schedule.
Done, ongoing processing	Administration. Establish budget, invoicing/accounting processes, contracts and processes for subcontractors.
Done, launching	Committee: Identify/Recruit/Establish membership and subcommittee structure, if any. Hold meetings to orient and launch.
Done, ongoing content	Website: Draft website framework for review. Website: By close of Stage 1, launch a website and establish social media (FB/IG) presence. Curate mailing lists and mechanisms for public submissions.
Done	Tours/Visits (2 days): Site visits to schools, district offices, facilities - initial meetings with administration & staff.
In progress (80%)	Key Stakeholders: Following site visits, schedule meetings with established groups such as staff, PAC/School Council, union leads, select boards/finance committees. Use question protocol to collect perspectives, early thoughts/ideas, aspirations/opportunities, challenges, and non-negotiables.
To be developed, May-June	Community Survey: Develop a choice and community survey to be distributed electronically through school/community listservs. Aggregate data.
Done, ongoing	Develop communications plan: In concert with PM and Committee, draft a communications plan for 12 months forward, by the close of Stage 1.
Done, ongoing	Press/Update: Jointly develop press release/updates to send to stakeholders as part of monthly outreach.
First meeting, more to be had	Delegates: Meet with the local delegation to review aims of the Study, seek input and support, and build a foundation for advocacy.
In progress, target for May/June	Historical review: Complete a review of collaboration/regionalization/sustainability studies in the district, include recent and relevant literature as relates to rural districts and parallel sustainability efforts (mergers, collaboration, regionalization).
Mostly done, still bumping into additional resources	Review completed reports: Carefully review and synthesize the most recent district studies including MARS Phase I, BEST, and Jetzon Data, etc. Present synthesis to Committee.
<ol style="list-style-type: none"> 1. Enrollment, draft 2. Finance baseline, draft 3. Ed Quality, visits launched 4. Personnel, lists organized 5. Buildings, in planning 6. RA analysis, about done 	<p>Using specialized consultants, organize and launch a process to begin a deep dive into a number of functional domains with the aim of establishing a deep understanding of the current state of the district. In doing so, options explored in Stage 2 & 3 can be evaluated for impact (the value proposition) within each domain. Note: a particular emphasis will be placed on finance, educational indicators, and buildings.</p> <ol style="list-style-type: none"> 1. Enrollment. Review NESDEC, update enrollment projections independently, examine student flow (choice/tuition). 2. Educational Quality. Use school/district review protocol when meeting with key district leaders, reviewing plans, examining outcomes, cataloging programs, services and supports, student activities, specialized programming (special education, ELL, alternative education, career education), etc. 3. Finance & Operations. Build a model for budget projections (revenue and expenses for both operating and capital based on actuals) that can be manipulated based on varying options, examine select operational systems (facilities, food, technology) as time/funds allow. 4. Personnel. Establish clarity of organizational charting, roles/responsibilities, assignments (load), longevity, salary/benefits, etc. 5. Buildings. Advance MARS work in clarifying physical plant needs, capacity, appropriateness of educational spaces. 6. Contracts/Agreements. As is useful towards understanding the present and future state of the district, review contracts and regional agreement to establish key considerations.

COMMUNITY OUTREACH



Meetings with town managers, legislative delegation

Meetings with school committees, school staff

Meetings with all eight select boards/finance comm.

2nd update send out earlier this month

Community Outreach Advisory Team met

Table at Celebration of Learning

2 more school community engagement sessions

Website and social media

Choice Survey in draft form; community survey to come

STEERING COMMITTEE LAUNCHED ON FEBRUARY 3

Thought partners

Review/critique/enhance deliverables

Evaluate (Options and opportunities)

Communication (to-from) and advocacy

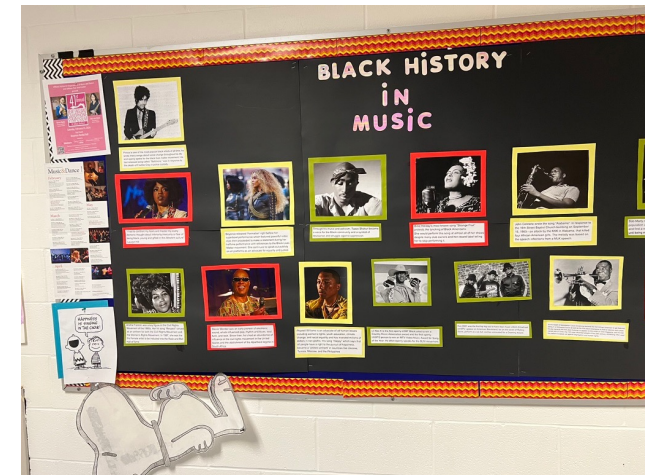
Four meetings held; next meeting 5/16, 5:30p



STEERING COMMITTEE

MEMBERS

Greg Lilly, Ashfield, District Athletic Director
Paula Consolo, Buckland, Finance Committee
Jenny Van Wyk, Colrain, Parent and Educator
Lindsey Sall, Charlemont, Parent
Ellen Purinton, Hawley, Community Member
Elizabeth Finn, Heath, Parent
Judy Cole, Plainfield, Select Board
Paul Hollings, Shelburne, Community Member
Robin Pease, Mohawk Trail/Hawlemont Director of Facilities and Transportation
Kristen Tilona-Baker, Executive Director, Mary Lyon Foundation
Sheryl Stanton, Mohawk Trail/Hawlemont Superintendent of Schools
Martha Thurber, Chair, Mohawk Trail School Committee
Elizabeth Van Iderstine, Chair, Hawlemont School Committee



ADVISORY TEAMS

Sign up if interested

Community
Outreach

Publicity
Engaging the community
Social media, website
Surveys

Finance

School costs
Financial models
Town contributions

Educational
Quality

Academics
Vocational education
School activities

Facilities

Buildings and grounds
Maintenance
Operations

ADVISORY TEAM



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HOME WHO WE ARE RESOURCES **CONTACT**

SEARCH

Interested?



2 DISTRICTS, 8 TOWNS SUSTAINABILITY STUDY



News from Our Team

- **ADVISORY TEAMS.** The **2D8T Steering Committee** will be assembling advisory teams in the areas of Community Outreach, Educational Quality, and Finance. If you are interested in learning more and providing feedback on these topics... drop us a note [HERE](#).

OUR CHARGE.

To support ongoing study and analysis of the operating and organizational structures of the two Regional School Districts: Mohawk Trail & Hawlemont

OUR TEAM.

H. Jake Eberwein, Project manager and lead researcher

Brendan Sheran, Project research/facilitator (data, educational quality)

Mary Nash, Project research (community outreach & engagement)

Judy Rush, Project research (educational quality, organizational systems)

Robert Putnam, Project research (historical review, literature)

Matt/Mark Abrahams, Project research (finance, operations)

David King, Facilities

Mark Maloy, Berkshire Regional Planning Commission, Project research (enrollment, town finance & economic indicators)

Russell Dupere (legal, regulatory)

Caroline Alexander (website development)



YOUR INPUT MATTERS.

<https://www.surveymonkey.com/r/2D8T-survey>

YOUR FEEDBACK: PROMPTS

1. What are the strengths of the districts and/or schools (what the districts and schools do well and what you highly value and appreciate)?
2. What would you protect at all costs and could not do without (your non-negotiables)?
3. What are the challenges and/or weaknesses of the districts/schools (tension points, gaps, and/or things you'd like to change/improve)?
4. What options and potential solutions should be considered to build upon the district's/school's strengths while addressing challenges/gaps?
5. What is your vision for the Mohawk Trail and Hawlemont districts in 10 years?
6. Is there anything the research team should know and take into consideration as the Sustainability Study is launched? Advice and suggestions are welcome.
7. Are there any particular questions you have for the research team and/or topics you'd like to see addressed in the future?

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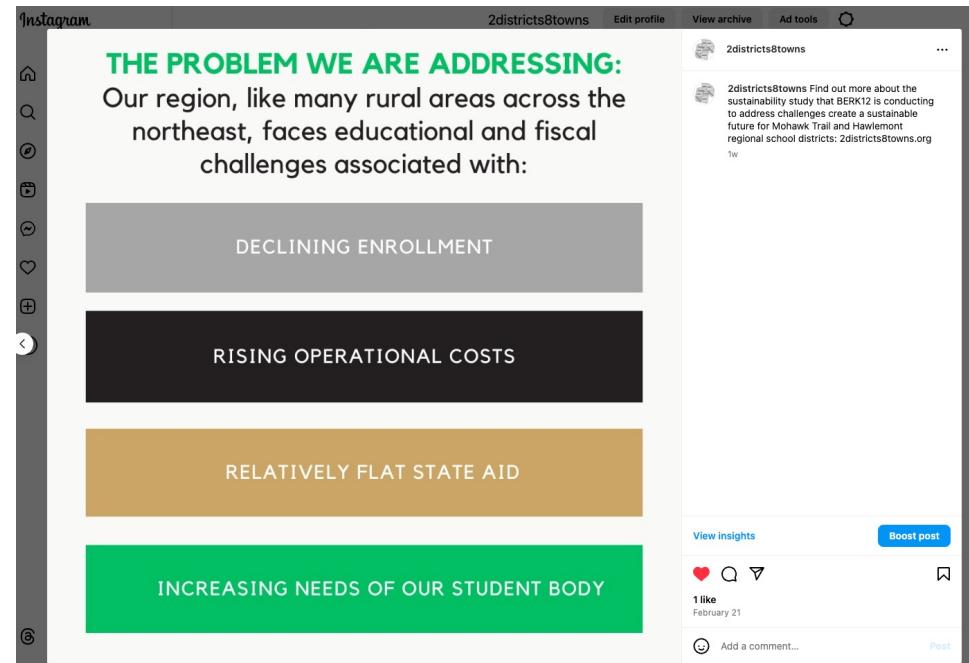
**2 DISTRICTS, 8 TOWNS
SUSTAINABILITY STUDY**



[News from Our Team](#)

FACEBOOK AND INSTAGRAM

2DISTRICTS8TOWNS



FOLLOW-UP FEEDBACK

<https://www.surveymonkey.com/r/2D8T-survey>



SURVEY

Introductory questions for Mohawk Trail & Hawlemont Sustainability Study

The following questions are designed to collect initial perspectives from steering committee members, elected officials, members of the school communities, students and their families, school staff, and interested community members to help the BERK12 research team launch this sustainability study.

We encourage you to share your responses in a few words or, as needed, longer sentences/paragraphs. There will an opportunity to provide more input through more detailed surveys in the spring.

Thanks for your feedback!

QUESTIONS/DISCUSSION/CONTACT.

www.2Districts8Towns.org



BERK₁₂

Berkshire Educational Resources K12

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