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PROPOSAL ONLY

To: Sheryl Stanton, Superintendent, Mohawk Trail/Hawlemont Regional School Districts
From: H. Jake Eberwein, Project Manager, BERK12

Re: Response to RFP (BERK12, H. Jake Eberwein)

Introduction:

We are pleased to submit a proposal in response to the recently released RFP for a Sustainability Study (the “Study”) for the Mohawk Trail and Hawlemont Regional School Districts. We believe that our experiences working in Berkshire County studying the current conditions of education, leading collaborative projects across districts, and facilitating the Regional School District Planning Board (RSDPB) are neatly aligned with your needs and, as such, position us to effectively lead this Study and meet/exceed target deliverables.

Below, we offer a brief summary of BERK12, our areas of focus (both current and historical), and a proposed work plan for the Study. We recognize the complexity of this project and commit to remaining flexible and open to plan adjustments. As such, we are more than willing to meet with your team, review the proposal, answer questions, and adjust the proposal based on your feedback.

Organizational summary:

BERK12 is dedicated to keeping K12 education strong in the Berkshires/Western Mass. It was formed in 2015 as a volunteer group of local school leaders, educators, business leaders, and community members concerned about significant challenges facing K12 education in the Berkshires, including steady population loss and aging, increasing financial stress on schools, and significant educational programming/services disparities across school districts - many of the same issues the Mohawk-Hawlemont schools face. Our aim, then, is to counter these challenges through community-informed solutions in order to *“support Berkshire County school districts and educators by collaboratively offering solutions to short and long term issues, in order to promote high quality public education, which all children deserve, regardless of background or circumstance.”*

BERK12 has evolved to become the region’s lead partner in advocating and innovating for the future of K12 education in the Berkshires. Focus areas for our work (the what we do) include:

1. **Research, Modeling and Advising:** We serve as a facilitator and project manager in providing communities with impartial research and knowledgeable guidance that inform the feasibility of (potential) formal partnerships and shared services (up to and including mergers). The focus of our

work over the past two years has been a partnership with the south county Regional School District Planning Board ([RSDPB](#)) researching and modeling potential collaboration and regionalization options between the Berkshire Hills and Southern Berkshire Regional School Districts. This complex work is multi-faceted and has required the ability to frame solutions that are technically sound (data driven) and reflect community input (social-emotional and political considerations).

2. **Collaborative Projects:** While many districts are not ready for formal mergers and partnerships, service/access/equity gaps can be closed through collaborative efforts. BERK12 has organized and led county-wide professional development; the Barr Foundation sponsored Portrait of a Graduate focusing on high school redesign; Study-Action teams that explore collaborative solutions in the areas of curriculum, back office, professional development, and out-of-school time; Professional Learning Networks that link role-type educators across districts; Rural Innovations, advancing college and career readiness and field experiences (internships) across partner high schools; and the Berkshire Resources for Learning and Innovation (BRLI) focused on cross-district technology champions who work to effectively integrate educational technology in our partner schools and districts.
3. **Networking, Public Outreach and Engagement:** Bringing school districts and community partners together to apply collective impact practices in setting mutually reinforcing goals is a function BERK12 serves, and can serve as a model for other rural regions. Examples of our work in this area are the formation and facilitation of partnerships with the District Attorney's Office, working with our regional colleges through dual enrollment expansion, an Anti-Bias county steering committee launched in response to school-based incidents, and the rural innovation program run in concert with the Berkshire Workforce Board. Moreover, raising awareness about rural education efforts has occurred through data/reports/[dashboards](#), advocating for ongoing funding and investments, conducting surveys and focus groups associated with various initiatives, and strengthening networks across sectors within the county and across the Commonwealth, all providing models for other rural regions.

To date, BERK12 has been fortunate to secure a mixture of funding streams through grant programs, legislative earmarks, member contributions, private/business donations, and foundation funding. We believe our ability to successfully raise funds reflects a proven track record of providing value by meeting the needs of our districts and our region.

Our fiscal sponsor and educational partner is Berkshire Community College (BCC). BCC is able to receive state funds as well as restricted dollars as a tax-deductible option for donors outside of the state budget process. If BERK12 is awarded the Mohawk-Hawlemont (MH) Study, it is expected our project team will support ongoing funding efforts to advance the MH work through foundations, grants, and state funding. Additionally, we anticipate that some current funds that BERK12 holds will be applied towards the MH effort (as was the case in south Berkshire).

In the fall of 2022, BERK12 produced a viewbook that can be accessed [HERE](#), which provides a high level overview of BERK12 efforts. A summary report to the Barr Foundation (July 2023) is available [HERE](#), and more information about BERK12 can be found at www.berk12.org. A large volume of information related to RSDPB can be found at 8towns.org, with reports and presentations organized on the [RESOURCES](#) page.

Rationale for Proposal.

In the past year (+) BERK12 has shifted from a volunteer-led thought and advocacy group to one that is committed to supporting **both** actions (collaborative efforts across districts and network building) **and** research/facilitation (from shared services to mergers) - acting as a regional educational service agency. Our experiences have taught us much, recognizing that Berkshire is not the only region facing enrollment, finance, and educational programming/services pressures. Our board has recently pledged to use those lessons learned to support other regions and districts as they advance study, planning, and solution-building. The board has, in fact, endorsed several key outputs as part of its funding commitment, including:

- advance research regarding educational quality and equitable access to educational opportunities in Berkshire County and other rural regions in the Commonwealth - including potential benefits, incentives, barriers, and policy implications;
- advance regional solutions such as partnerships (mergers and regionalization), shared services, and other collaborative activities among/across rural public schools and school districts - serving as both a technical resource and facilitator;
- organize and facilitate a rural network (like that of the urban and gateway networks) that meets semi-annually to review data, identify challenges, forge collective solutions, and advocate to DESE and legislative leads;
- revisit and refine priorities for legislative consideration as relate to rural educational challenges and solutions - as informed by historical effort, research, and commission efforts; and
- serve as a clearinghouse for best practices in rural education across the Commonwealth.

As Mohawk representatives have actively participated in BERK12 (BCETF) meetings since 2015, and considering Mohawk's location within the MASC Region 6 footprint, it is both logical and in alignment with our goals to support our closest neighbor in tackling this Study. We do so recognizing that we won't have all the answers, but if we form a partnership, maintain shared ownership of the process, and apply what we've learned through a community informed process, we are likely to land on actionable, sustainable solutions.

We acknowledge that BERK12 invested in a 2 ½ year process with our RSDPB partners in exploring a range of options and alternatives, generating a substantial body of research, and reaching board consensus on a highly detailed preferred (merger) option. However, this recommendation *was ultimately defeated* by voters at special town meetings. That acknowledged, we learned a great deal (process, success/failure, politics) about regionalization/sustainability efforts and experiences that can be applied:

- **TIME.** This work does not happen overnight, it requires ample time and broad engagement.
- **TECHNICAL.** As complicated technical and political work, turning over every stone will require a team effort and specialized knowledge.
- **MESSAGE.** Recognizing this technical complexity, there will be tensions in shaping a message that is not too much, and not too little - in meeting the needs of varying audiences (from parents to finance subcommittees).
- **MANAGEMENT.** A management team (both on the consultant/volunteer board sides) is critical in attending to and championing the work, pushing forward each day as challenges and opportunities arise.

- **VOICE.** Credible voices must be leveraged as powerful advocates and allies, from local leaders to state-level partners.
- **ENGAGEMENT.** Public engagement and knowledge raising is critical, recognizing many will not pay attention until the decision is directly in front of them.
- **SOLUTIONS.** Engagement rises when community informed solutions are generated by empowered stakeholders...and these solutions are more likely to stick.
- **VALUE.** Solutions must offer a compelling value proposition that appeals to a range of stakeholders in ways that resonate.
- **MODELS.** Models and projections are just that...and will be challenged, thus must be both precise in method and transparent in assumption.
- **DECISION.** As solutions are considered, compromise will compete with self-interest and facts will compete with emotion - data alone won't win the day.
- **BENEFITS, NO HARM.** Unintended consequences are a likely byproduct (both good and not-so-much) of process - the aim, then, of any conflicted public process is to yield benefits that outweigh risks.

Research Approach.

Generally, our team follows a broad organizational change framework that includes the following:

- **Study:** Gather the necessary groundwork, research, and data needed to inform decision making and assess (elevate) readiness.
- **Plan:** Develop aspirations and priority options that lead toward a preferred future.
- **Engage:** Solicit input and organize for impact, prioritize public engagement.
- **Act:** Initiate and implement selected (best) strategies.
- **Sustain:** Use feedback systems and coaching to support continuous improvement.

It is expected in this Phase II Sustainability Study that we will focus on *Study, Plan and Engagement* with an eye towards realistic and *Sustainable Actions*.

The complexity of regionalization work, and the historical failure of many regionalization efforts, requires that our work plan and our team remain open-minded, flexible, and willing to pivot as particular findings are revealed, priorities are clarified, and directions of focus potentially shift. Also, we believe that while literature, historical experience and case studies play a role in deriving informed decisions, all solutions must be grounded in the user experience – in the case of schools – students, faculty, families, and community residents reflecting varying perspectives.

Given our recent efforts with RSDPB, we will place a premium on the community engagement effort early and consistently throughout the Study. A well grounded, researched, and data informed plan that makes complete sense, but lacks public support, will fail. Thus, we recognize (using words from the RFP) the need to “persuade (the) community to take action.” Our aim is to apply best practices from the International Association of Public Participation ([IAP2](#)) that describes public participation as a continuum:

- **Inform:** Providing balanced and objective information (we'll keep you informed).
- **Consult:** Public feedback on options and decisions (we'll work to ensure your concerns and ideas are reflected).
- **Involve:** Work with the public throughout (we'll work with you to ensure your concerns and ideas are reflected).
- **Collaborate:** Partner with the public in aspects of decision making (we'll look for your advice and solutions).
- **Empower:** Final decisions belong to the public (we will implement what you decide).

Clearly, public participation must span all five levels of public impact, recognizing that in many/most public processes, the final decision (particularly in a regionalization process) ultimately lands in the hands of the resident/voter. Thus, ensuring ways to include a range of stakeholders - beyond simply informing - is a critical consideration if the outcome desired is a widely accepted and approved solution.

Our post-analysis of community outreach in south Berkshire suggests the need to be agile, to vary approach with an eye towards needs and interests of various stakeholders, to engage in respectful dialog and acknowledge concerns (and opposition), and to apply a range of media methods that increase access and touch points. Our challenges included getting stakeholders to show up (people live busy, complicated lives), and we believe that finding ways to access captive audiences (boards, associations, parent groups) will be more effective than simply asking for attendance at open meetings. We must also be proactive (rather than reactive), appeal to both logic and emotion (the heart), and counter misinformation driven by resistance to change.

Our Proposal (draft Work Plan).

Plan Overview

We have reviewed the Mohawk-Hawlemont RFP and express our interest in partnering with your communities to advance the Sustainability Study. Our (BERK12) goals and priorities align with your efforts, we are fresh off a similar effort in southern Berkshire County, and we have current funds (through FY24) that will be applied to supplement staff (mainly the Project Manager) through June 2024. We recognize that your Committee seeks to (summarized):

- Analyze data as provided in Phase I
- Project enrollment, finance, educational factors, and buildings in developing alternative options/solutions (regionalization, consolidation, other possibilities)
- 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
- Refine options that ensure high-quality educational delivery that are fiscally sustainable
- Create and lead a communications/engagement plan that ensures a consistent stream of information and affords for broad public involvement

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.

Our team proposes to accomplish this Phase II (January 1, 2024 through March 1, 2025 - close date of June 30, 2025) effort through a three stage process outlined below:

Stage 1. Process Organization, Context Setting, Community Engagement (A)

Target dates: January 1, 2024 through May 1, 2024

Stage 2. Deep Data Dive & Analysis, Option Generation

Target dates: May 1, 2024 through August 1, 2024

Stage 3. Preferred Models, Community Engagement (B), Final Report/Next Steps

Target dates: August 1, 2024 through January 15, 2025

Final Report Delivery: February 28, 2025

Throughout these Stages, our research team will commit to responsibilities and study across functional areas, with intensity (and depth) of analysis guided by Committee/Superintendent/community input and time/scope of work:

- **Project Management:** Oversight and coordination of project in concert with Committee (Chair)/Superintendent including work planning, oversight of contractors, committee meetings, timelines, budgets, presentations and deliverables, interface with media/press, etc.
- **Educational Quality:** Analysis of existing and potential educational programs, services and supports, organizational structures, methods, curricula, student/faculty experiences, class sizes, and student outcomes. Comparison to competing districts, as able.
- **Finance:** Analysis of existing, projected, and potential models as related to district finances (expenses and revenue), both operating and capital - include fiscal implications for towns/residents.
- **Operations/Facilities:** Buildings (physical condition, capacity, appropriateness of space) and operational systems (such as transportation, technology, maintenance, back office, etc.).
- **Personnel:** Organizational charting, assignments/responsibilities, utilization, licensure/specialization, longevity, etc.
- **Legal:** Contracts, regulatory, and regional agreement considerations.
- **Community Outreach:** Information development and dissemination, public engagement and input, community consideration and support for option(s).

We will emphasize that this process will *not* be structured as a formal regionalization study as governed by [Massachusetts General Law](#), and advised by DESE [guidance documents](#). If, at some point during the Study, the Committee seeks to advance a more formal regionalization process, it will be important to adjust the work plan and consider alternative organizational structures that reflect regulatory guidance.

BERK12 Team

As an entity that utilizes a fiscal sponsor (Berkshire Community College), is guided by a voluntary board, and has no employees - this proposal will be supported by a team of independent consultants (as is consistent with historical and current BERK12 administration and operations) in the following roles:

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, facilities)
Mark Maloy, Berkshire Regional Planning Commission, Project research (enrollment, town finance & economic indicators)
Russell Dupere (legal, regulatory)
Caroline Alexander (website development)

As is the case with all projects, BERK12 will also partner with regional and state partners and access a wide network in seeking/securing additional resources as needed, and as listed (but not limited to) below:

Franklin Regional Council of Governments (FRCOG)
DESE (Office of Regional Governance)
Department of Revenue
Associations (MASC, MARS, MOEC, MASS)
Topic Specific Consultants (as needed)
 Alliance Education (Transportation)
 Odyssey Advisory (OPEB)
 Seth Racine/Open Architect (Data, dashboards, technology)
 Bill Ballen (Special Education)
Interns, as available

While each member of our core team has a specific set of skills, each of us has broad experience that can and will be applied to the development of a work plan, data collection and organization, analysis, findings, writing, and presentation. Selected (brief) bios are included at the back of this proposal.

Details

As suggested, it will be important to develop an agreed upon (final) work plan in partnership with the Committee, and then respond flexibly over the duration of the Study. Below, each Stage is described in greater detail with brief descriptions of timeline, tasks, and deliverables. The ability to move through each Stage will be influenced by Committee input (priorities and directions) as well as access to necessary school/district resources (personnel, data, reports, etc.).

Stage 1. Process Organization, Context Setting, Community Engagement (A)

Target dates: January 1, 2024 through May 1, 2024 (approximately 13 weeks)

The first block of effort (Stage 1) will be invested in building the foundation for the Sustainability Study. This will include forming the Committee, clarifying the current state of the district, initiating deeper data analysis, and launching community outreach.

A. Setup

- a. **Project Planning:** Work with the leadership team/committee to define the work plan, priorities, any remaining questions, consulting team, and schedule.
- b. **Administration.** Establish budget, invoicing/accounting processes, contracts and processes for subcontractors.
- c. **Committee:** Identify/Recruit/Establish membership and subcommittee structure, if any. Hold meetings to orient and launch.
- d. **Website:** Draft website framework for review.
- e. **Tours/Visits (2 days):** Site visits to schools, district offices, facilities - initial meetings with administration & staff.

B. Initial Community Outreach (Part A)

- a. **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.
- b. **Community Survey:** Develop a community survey to be distributed electronically through school/community listservs. Aggregate data.
- c. **Website:** By close of Stage 1, launch a website and establish social media (FB/IG) presence. Curate mailing lists and mechanisms for public submissions.
- d. **Develop communications plan:** In concert with PM and Committee, draft a communications plan for 12 months forward, by the close of Stage 1.
- e. **Press/Update:** Jointly develop press release/updates to send to stakeholders as part of monthly outreach.
- f. **Delegates:** Meet with the local delegation to review aims of the Study, seek input and support, and build a foundation for advocacy.

C. Review Historical and Relevant Efforts

- a. **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).
- b. **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.

D. Launch Data Collection Process

- a. 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.
 - i. **Enrollment.** Review NESDEC, update enrollment projections independently, examine student flow (choice/tuition).
 - ii. **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.
 - iii. **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.
 - iv. **Personnel.** Establish clarity of organizational charting, roles/responsibilities, assignments (load), longevity, salary/benefits, etc.
 - v. **Buildings.** Advance MARS work in clarifying physical plant needs, capacity, appropriateness of educational spaces.
 - vi. **Contracts/Agreements.** As is useful towards understanding the present and future state of the district, review contracts and regional agreement to establish key considerations.

Deliverables (by close of Stage 1, May 1):

- Established Committee (and subcommittees if appropriate), meetings
- Evidence of meetings and interviews (question protocol)
- Approved work plan
- Published website
- Protocol for stakeholder meetings and evidence of meetings
- Draft and final stakeholder survey, distribution of survey, data collection
- Literature/Historical Review
- Communications plan
- Press/Monthly updates

It will be important to transition into Stage 2 with a clear message that articulates the need to continue forward, namely why this Study is important (raising urgency) in summarizing key challenges and potential opportunities/aspirations (the *what if*).

Stage 2. Deep Data Dive & Analysis, Option Generation

Target dates: May 1, 2024 through August 1, 2024

The second block of effort (Stage 2) will be invested in going deeper into the various functional areas in completing the process of benchmarking the current state of the district/community. Community engagement from Stage 1 will be combined with benchmark data to generate a range of possible options and solutions. Evaluation tools will be used to prioritize, weigh, and curate a subset of preferred models.

A. Community Outreach and Engagement

- a. **Findings:** Report findings from Stage 1 Community Outreach (A), group themes and implications.
- b. **Key Stakeholders:** Finish any key stakeholder meetings - Organize and group themes and implications.
- c. **Website:** Published and enhanced with additional content such as FAQs.
- d. **Adjusted communications plan:** Updated to reflect feedback as well as successes and challenges.
- e. **Press/Update:** @Monthly, ongoing.
- f. **Delegates:** Outreach with support of local delegation to state officials to support ongoing funding, incentives/disincentives, regulatory considerations, advocacy and ongoing support for Study.

B. Completion and Sharing of Benchmarking Data

- a. Publish and present findings as related to the current state of the district across various functional domains, answering the questions:
 - i. What is the current state?
 - ii. What are projections for the future, assuming no change (*status quo*)?
 - iii. Where are there potential opportunities that can move the district towards desired aspirations?
 - iv. What are the tension points/challenges, as well as the non-negotiables (proposed changes that will immediately lead to resistance)?

Benchmarking will occur within the various functional areas described above and listed below, and shared with the Committee in both narrative form and presentations.

- Enrollment
- Educational Quality
- Finance & Operations
- Personnel
- Buildings
- Contracts/Agreements

C. Establish a Range of Options, Apply Evaluation Framework to Narrow

- a. Using data collected in A) and B), curate a list of possible alternative options and solutions (regionalization, consolidation, other possibilities such as structural/organizational/programmatic changes).
- b. Develop evaluation tools in partnership with the Committee and apply the tools to assess the various options generated in a).
- c. Facilitate discussion and priority setting to narrow potential alternatives down to a subset of preferred options/models.
- d. Identify functional areas for additional study and interest - those where answers (data) to outstanding questions may remain and be of high importance (for example, transportation).

It's important to note that evaluating the various options/alternatives will be a critical step in Stage 2. For the RSDPB, we used two primary evaluation tools followed by a facilitated discussion. The tools were:

- **Ease-Impact.** This methodology 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 one of four quadrants to communicate, in a relatively simple/broad way, whether they are more or less desirable. In short, most desirable fall into the top left quadrant (easy to do, high impact) and those least desirable fall into the bottom right quadrant (low impact, hard to do).
- **Four Domains.** Our RSDPB also examined each of the Models/Scenarios with four key domains that included, with a leading essential question:
 - Educational Quality: Does the solution lead to improved, equitable educational access, opportunities and outcomes?
 - Operational Efficiency: Does the solution lead to reduction in operational redundancies, greater system-wide alignment, and general operational efficiencies?
 - Finance: Does the solution reflect efficient, sustainable models that build economies of scale allowing for expanded/reinvestment of and equitable distribution of resources?
 - Feasibility: How realistic is the solution in terms of impact versus effort, politics, culture, legal/regulatory, and incentives and disincentives?

Additionally, solutions can be examined for strength of solving the problem (near and longer term), desirability (how compelling is the value proposition), readiness (will the community support), and viability (how realistic is the solution) - for example.

Deliverables (by close of Stage 2, August 1):

- Evidence of committee and subcommittee meetings
- Ongoing/updated work plan
- Updated website with additional enhancements and content
- Findings and themes from community outreach (A)
- Findings and themes from stakeholder meetings

- Current state (benchmarking) of district across functional areas articulated in summary reports and presentations
- Press/Monthly updates
- Full list of alternatives/options
- Evaluation tool (s), co-developed with Committee
- Curated list of evaluated alternatives/options (now referred to as models)

It will be important to transition from Stage 2 with a subset of 2-3 most promising alternatives/solutions (from this point forward, referred to as *models*).

Stage 3. Preferred Models, Community Engagement (B), Final Report/Next Steps

Target dates: August 1, 2024 through January 15, 2025

Final Report Delivery: February 28, 2025

The last block of effort (Stage 3) will be invested in deeper analysis of the preferred/curated models. This will include application of the evaluation tools (again) driven by a longer list of prompts to consider, analysis in each of the functional areas (adding any specific modeling requests) and engagement with both the Committee and a broad range of stakeholders who will consider, offer feedback, and prioritize the various models. A final report will be provided and, we expect, will set the stage to move into Phase III, moving a preferred model from concept to reality.

- A. Deep analysis of preferred models, with consideration of the desired future state
 - a. Each alternative will be modeled in greater detail with an eye towards looking at future implications within each functional domain. Questions answered will be:
 - How does the alternative improve (or not) the future state?
 - What opportunities does the model yield in moving the district towards desired aspirations?
 - Within each model, what tension/challenges will remain in order to actualize?
 - What are the implications of the model within each functional domain?
 1. Enrollment
 2. Educational Quality
 3. Finance & Operations
 4. Personnel
 5. Buildings
 6. Contracts/Agreements
 - b. The Committee will engage in facilitated discussion to determine the implications (the value proposition) that could be realized through each model. The Committee may reuse and/or expand existing evaluation tools to take a deeper look into each of the models. For example, within the educational quality domain, a partial list of prompts might include, does the model...
 - Improve educational access, opportunity, and outcomes for students?

- Offer ways to improve access, diversity, breadth and quality of education (programs, courses, activities, enrichment, and career pathways) for children so they are fully prepared for college, career and life, whether here in Western MA or beyond?
- Lead to more consistent evaluation of program effectiveness through analysis, on a regular 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?
- 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?
- Expansion of distance learning and collaborations with colleges/universities?
- Enable educators to access high quality professional learning opportunities and collaborate in support of individual, team, school, and district goals?
- Create easier access to partnerships with third parties, e.g., non-profits, community agencies, collaboratives, vocational-technical schools?
- Result in additional supervision, professional development and coaching that is also more cost-effective?
- Increase cohort size to expand offerings and reflect research pertaining to optimal class size?
- 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?
- Improve access to unique services and programs for special education, English Language Learner, and alternative education students?

- 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?
- Lead to elevated reputation that encourages retention of resident population?

B. Community Outreach and Engagement

- a. **Key Stakeholders:** Schedule second round of stakeholder meetings with established groups such as staff, PAC/School Council, union leads, select boards/finance committees. Use protocol to review models and solicit input, feedback, critiques, affirmations and general reactions. Aggregate data.
- b. **Community Survey:** Develop a second community survey to be distributed electronically through school/community listservs that will be focused on gathering input on the various models to test the temperature of readiness for change (as described in the models) and solicit feedback (critiques, affirmations and questions). Aggregate data.
- c. **Community Meetings:** Host 2 open community meetings that are facilitated and offer stakeholders an opportunity to hear about the models, ask questions, and offer feedback.
- d. **Website:** Use website to (as time/resources allow) develop short form videos, briefs, question drop boxes, reports, meeting dates, and FAQs to support public understanding of the various models/alternatives.
- e. **Projected communications plan:** Develop an updated communications plan that projects beyond Stage 3 and considers a public campaign to generate support for a preferred model/alternative.
- f. **Press/Update:** @Monthly, ongoing.
- g. **Delegates:** High engagement with the local delegation and state officials to consider incentives and supports, reduction of disincentives and regulatory barriers (if any exist), and provide voice and advocacy at the local and state level.

C. Findings

- a. **Final Report.** Developed a final report that provides a user friendly, concise summary of the Study including:
 - background/methods,
 - description of preferred models,
 - rationale for preferred models (as informed by data, modeling, feedback from the Committee and community, and evaluation tools) - with a focus on finance, educational quality (access and opportunities), and facilities, and
 - potential barriers and needed incentives.
- b. **Presentation.** Sharing of final report to Committee and, as directed, stakeholder groups.
- c. **Next Steps:** Produce a short draft outline (work plan) for Phase IV (planning for actualization of a preferred model) that will include tasks, timelines, and necessary resources.

The close of Stage 3 will mark the ending of Phase II and our team's proposed work plan. This will leave the Committee with a body of research, a number of well thought out, researched, and vetted alternatives, and a set of next steps to actualize a preferred (or variation of) model.

Deliverables (by close of Stage 3, final report by Feb. 28):

- Evidence of committee and subcommittee meetings
- Ongoing/updated work plan
- Updated website with additional resources and products
- Press/Monthly updates, additional media (video, social media, briefs)
- Fully studied and vetted models (2-3) with specific focus on finance, educational quality/access, and buildings.
- Feedback/findings from community outreach/stakeholders - Committee facilitated discussion on models
- Final report, as described (background, findings, rationale)
- Rough outline for next steps (tasks, timeline, resources, community outreach)
- Evidence of engagement with and support from local delegation and state agencies (funding, technical support, legislative/regulatory advocacy)

Proposed Workflow:

Recognizing that this Study will span 14 months, and will likely require adjustments as priorities, work plan, and timelines shift, the budget reflects hours allocated for consultants who will focus on key functional areas. The consulting team will be assigned responsibilities, tasks and deliverables to implement the work plan outlined in the three Stages described above.

We have modeled the work team's efforts assuming approximately 8-12 hours per week for each member of the team, over @54 work weeks. Work will occur both on-site and remotely and will require access to district data, personnel, and administration. It will also require the ability to use the district's communication systems to share information and solicit stakeholder participation in various community engagement activities.

The Project Manager will serve as lead, and will commit to consistent weekly efforts from start-to-finish in coordinating all aspects of the Study in partnership with the Committee/Chair/Superintendent, and will be readily "on call" to interface with the Committee, district leadership, and community leaders. Consultants will be assigned at various times in varying intensities (weekly effort and hours) based on ebb/flow of tasks and deliverables. The core team will, generally, invest weekly effort towards the Study in maintaining forward progress and timelines. In some cases, specialized consulting will be accessed as needed and for shorter duration tasks.

Bi-weekly check-in with the Chair/Superintendents is expected. BERK12 will provide *additional* (in-kind) time at no cost to the Committee for the Project Manager (and possibly some members of the core team) - see note below under Budget.

The team will seek opportunities to conduct site work (interviews, focus groups, tours, convenings, and team working time) – with careful consideration for the work loads that local school and town staff carry. We believe that strong relationships through physical presence and regular communication will build trust, inform the work so it reflects the community’s values, and ensure that the final report is informed by those who will enact and function within potential models/alternatives. We expect to participate in committee and subcommittee meetings strategically, with the lead (or a subset) of the research team members assigned, and will be present at other requested board meetings/gatherings (such as town select board and finance subcommittee). While our team is more than able to attend in person and travel on-site, we also seek to conserve hours and travel costs and, as such, will work remotely when appropriate. Given our team’s hours are limited, controlling meeting and travel time will ensure that time used is applied to the research and associated tasks.

Closing:

The work of considering, researching, planning, and mobilizing for regionalization and sustainability work is incredibly complex. Thus, as we did in south Berkshire, we submit this proposal with a degree of humility, but with 2+ years of recent experience on a similar project along with extensive experience in bringing partners together to implement educational initiatives. Still, we acknowledge that there is no perfect set of directions or formula for tackling this work and there are no perfect consultants. What we offer you is an experienced group, committed to your regional efforts, and willing to work and learn with your community. We look forward to the opportunity to discuss what, we believe, we can offer to the Mohawk-Hawlemont districts and your community as you engage in this incredibly important work.

We are more than pleased and available to meet in person or remotely to review any/all parts of this proposal, and answer any/all questions you may have. As such, we respectfully submit this proposal for the Sustainability Study for the Mohawk Trail-Hawlemont communities.

Team Summary Bios

H. Jake Eberwein

H. Jake Eberwein, Ed.D., has been a public educator since 1994, serving in a variety of roles from classroom teacher to college dean. After 10 years as a high school science and mathematics teacher, he served as the principal of Pittsfield High School (2003-2007), later moving into the role of Pittsfield's Deputy Superintendent (2007) and Superintendent of Schools (2008 through 2012). During that time Dr. Eberwein served as the co- chair of the Urban Superintendents Network, led the application and planning process for the new Taconic High School, closed achievement gaps, lowered dropout/raised graduation rates, and strengthened relationships with community partners. In 2012, he assumed the role of Dean of Graduate and Continuing Education at Massachusetts College of Liberal Arts where he led the development of a new leadership licensure program, facilitated Common Core county-wide PD, launched new degree completion programs, and led the Feigenbaum MCLA Leads Initiative, and the Berkshire Compact for Education. Jake returned to public education in 2018 as a part-time Superintendent in Lee, balanced with consulting work connected to BERK12 and the Berkshire Taconic Community Foundation - work focused on supporting research related to and implementation of educational solutions. He served as interim Superintendent of the Lenox Public Schools from December 2022 to June 2023, and is currently leading the BERK12 efforts in various areas, including serving as the Project Manager/Lead Researcher of the Regional School District Planning Board. Dr. Eberwein has and continues to serve on a number of state-wide and local boards/committees. He received his undergraduate degree in Biology/Chemistry from Skidmore College, his Masters from MCLA, and his doctoral degree from UMass Amherst. He shares his life with his wife, five children, and pets in Dalton.

Brendan Sheran

Brendan Sheran has been an educator in the Berkshires for 18 years. A National Board Certified Teacher, he taught social studies for ten years at Pittsfield High School and served as a department chair as well as president of the city's teachers union (2013-2017). He continued his development as an educational leader in Pittsfield by serving as Pittsfield High School's first Assistant Principal of Teaching and Learning (2017-2021), helping to lead the school out of state turnaround status, improve instructional practices, and navigate the complexities of running a school during the Covid-19 pandemic. In addition, he has taught undergraduate education courses at both Massachusetts College of Liberal Arts and UMass Amherst. Brendan is a pragmatic and collaborative leader who has a unique blend of teaching, administrative, and labor relations experience. He has worked with BERK12 for three years as a consultant and project facilitator for The Berkshire Portrait of a Graduate collaboration and various cross district projects bringing together community members and stakeholders across the region. His technical support and vision has also established many high quality county wide professional learning opportunities for teachers and administrators. Brendan holds a BA in History from UMass Amherst, an M.Ed and CAGS in Educational Leadership from the MCLA. He is currently pursuing his doctorate in Education Leadership and Policy at UMass Amherst.

Mary Nash

Mary Nash of Nash Insights has done extensive evaluation and consulting work, helping schools, colleges, nonprofit organizations, foundations, health care systems, and collaborative groups assess needs as well as develop, implement, and evaluate programs. She is highly experienced at conducting surveys, focus groups, and interviews among varied audiences and skilled at presenting results in clear, engaging formats. Mary has worked with the Berkshire Educational Task Force since 2020 doing community outreach to gather input from students, educators, parents, employers, elected officials, and other community members regarding the future of education in Berkshire County. She is a graduate of Connecticut College, has an MBA from Boston University's Questrom School of Management, and earned certificates of Evaluation Practice and Analytical Evaluation Methods from The Evaluators' Institute of Claremont Graduate University. Mary serves on the board of directors of Flying Cloud Institute and the MCLA Foundation.

Judy Rush

Judy Rush's experience in education spans over three decades. This includes teaching all grade levels from Pre-K to high school and senior leadership roles at both the school building level and central office administration. Judy has served as the principal of Egremont Elementary School and is currently the Director of Teaching and Learning for the Pittsfield Public Schools. Her experience has led her to become an Educational Consultant with SchoolWorks where she contributes to advancing student learning by empowering educators and institutions to effectively assess, plan, and achieve student success. Additionally, Judy plays a pivotal role in supporting and mentoring teaching candidates to achieve licensure in her role as an Instructional Consultant for Class Measures. Judy's professional journey came as a second career with ten years spent in human resources and finance management within a Fortune 500 company. She is a member of the Government Finance Officers Association (GFOA) where she has been able to link her prior business experience to support best practices in school budgeting which has been instrumental in her work writing and managing millions of dollars worth of competitive and entitlement grants. Judy is active in many county committees including membership on the boards of the Berkshire Museum and Berkshire County Head Start. She received a Bachelor of Science in Marketing, Management, and Accounting from Monmouth University and a Masters in Education from Cambridge College.

Abrahams Group

The Abrahams Group is a group of independent consultants who work with Mark D. Abrahams, President of The Abrahams Group, and have worked together for over 20 years. The Abrahams Group is duly licensed, registered, or otherwise qualified to perform the services described in the RFQ.

Mr. **Mark D. Abrahams** will serve as the lead and be responsible for the successful completion of associated project tasks. As such, The Abrahams Group will serve as a prime contractor for this project. Mr. Abrahams has over 30 years of experience in related projects. Mr. Abrahams has conducted financial reviews of the administration and business offices for the Ashland, Barnstable, Concord, Dunstable, Hanover, Hopkinton, Hull, Longmeadow, Norwood, Revere, Watertown, Wayland, and Westfield school systems. He also is experienced in working with Massachusetts regional school districts having worked

with Acton-Boxborough, Amherst-Pelham, Ayer-Shirley, Berlin-Boylston, Berkshire Hills, Chatham-Harwich (Monomoy), Dennis-Yarmouth, Dighton-Rehoboth, Greater Lowell, Greater New Bedford, Groton-Dunstable, Minuteman, Northeast Metropolitan, Somerset Berkley, Up-Island, Martha's Vineyard, Mohawk Trail, and Wachusett. Mark Abrahams is the Fiscal Overseer of Spencer-East Brookfield Regional School District. Mr. Abrahams has a bachelor's degree in Political Science from Lake Forest College, a master's degree in Political Science from the Urban Studies Institute of the University of Toledo, and an MBA from Suffolk University. He is a Certified Public Accountant and a Certified Government Financial Manager.

Mr. **Matthew A. Abrahams**, Principal of The Abrahams Group, will serve as staff on this project and be primarily responsible for the financial tasks. Matthew has assisted his father on several similar projects including the Amherst-Pelham regionalization and assessment methodology studies, the Berkshire Hills assessment methodology study, the Berkshire Hills – Southern Berkshire regionalization study, the Berlin-Boylston regionalization study, the Dennis/Dennis-Yarmouth regionalization study, the Dighton-Rehoboth assessment methodology study, the Dracut operational review, the Gill Montague – Pioneer Valley regionalization study, the Groton-Dunstable operational review, the Mount Greylock regionalization study, and the Saugus Public Schools and Wayland Public Schools reviews. He has assisted several districts with implementing the general ledger system including the Greenfield, Nantucket, and Newburyport school districts and the Dighton-Rehoboth, Greater New Bedford, Lincoln-Sudbury and Northeast Metropolitan Regional School Districts. He holds a Bachelor of Science degree in mathematics/computer science from Colgate University.

Robert R. Putnam

Robert R. Putnam has been actively engaged in Berkshire County public education since 1985 when he served as the Berkshire County liaison for the National Coalition for School Improvement. Over the course of his career he has served as an elementary classroom teacher, elementary and middle school music teacher, curriculum director, elementary and middle school principal, assistant superintendent, and superintendent in Berkshire County Schools. He holds an Ed.D in curriculum studies from UMass and has completed training in curriculum auditing with Fenwick English, Understanding by Design with Grant Wiggins, instructional practice at the Institute for Learning with Lauren Resnick, leadership training with the National Institute for School Leadership, and Observing and Analyzing Teaching with Jon Saphir at Research for Better Teaching. After retiring in 2018, he worked with the Statewide System of Support in schools in western and central Massachusetts, the Berkshire County Education Task Force, and he has served in interim administrative positions in the county.

Full resumes are available upon request.