



BERK₁₂

Berkshire Educational Resources K12

2D8T Steering Committee

February 15, 2024
2Districts8Towns.org

SUSTAINABILITY STUDY: PHASE II

H. Jake Eberwein, BERK12 Director

AGENDA



- Review/approval of minutes from February 3, 2024
- Discussion of initial Steering Committee survey – Jake Eberwein
- Progress Report/Key Upcoming Initiatives – Jake Eberwein
 - Stage 1 Workplan
- Discussion of Subcommittees
 - Focus areas
 - Priority of formation
 - Outreach for community members
- Other Updates
 - Legislation: Rural Aid and other pending bills
- Public Comment

The meeting will be held in the Superintendent's Conference Room at the Regional School (24 Ashfield Road, Shelburne Falls, MA) and remotely via

Google Meet joining info

Video call link: <https://meet.google.com/owv-eaxo-mbw>

Or dial: (US) +1 315-812-1265 PIN: 818 566 909#



MINUTES &

Updates/Discussion points from the Chairs

CHARGE.

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



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

2

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

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

4

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

5

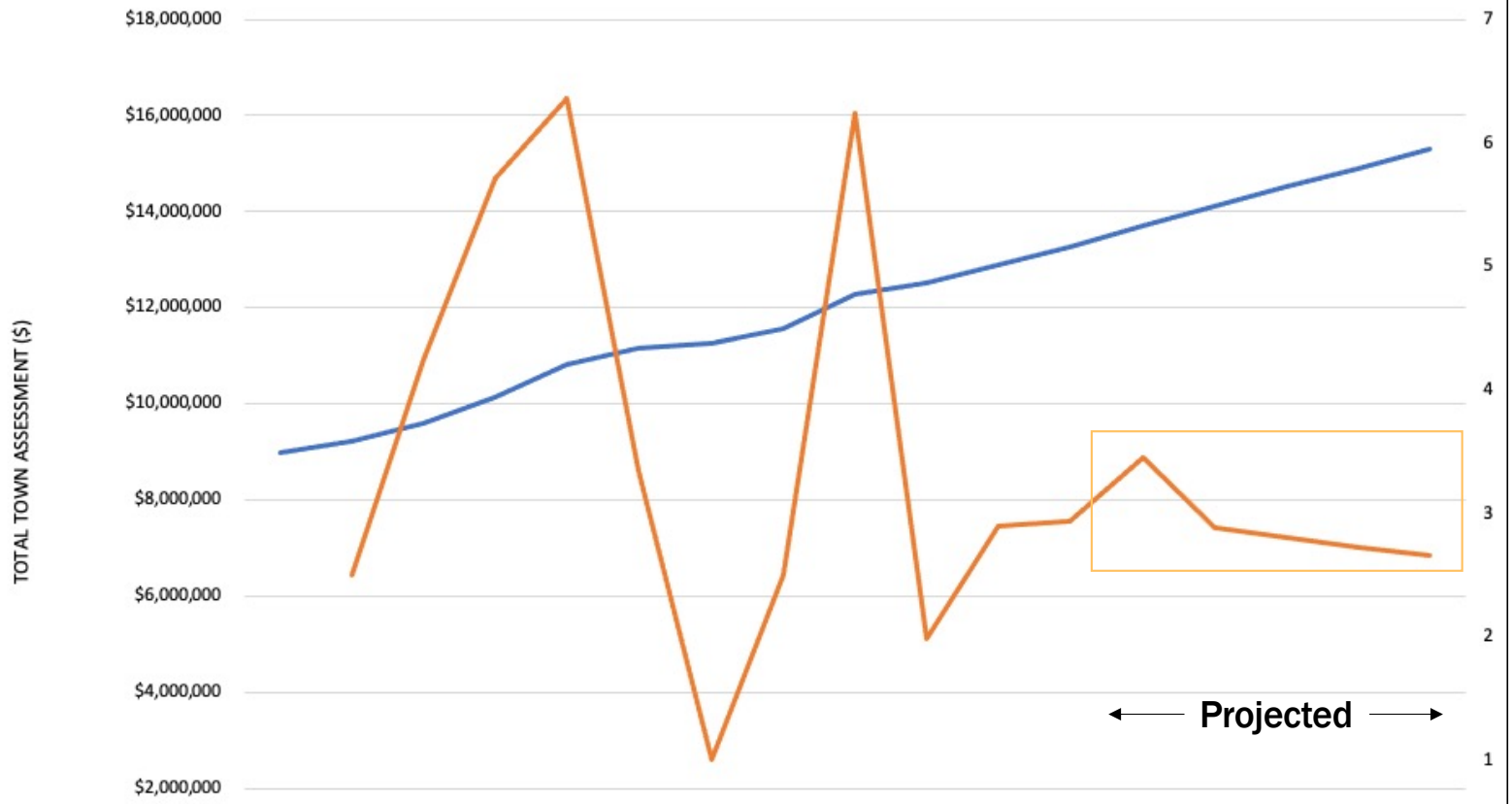
Create and lead a communications/engagement plan that ensures a consistent stream of information and affords for broad public involvement

**ANY
QUESTIONS?**

Slide deck from
2.3.24, [HERE](#)

Slide deck for
Towns, [HERE](#)

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

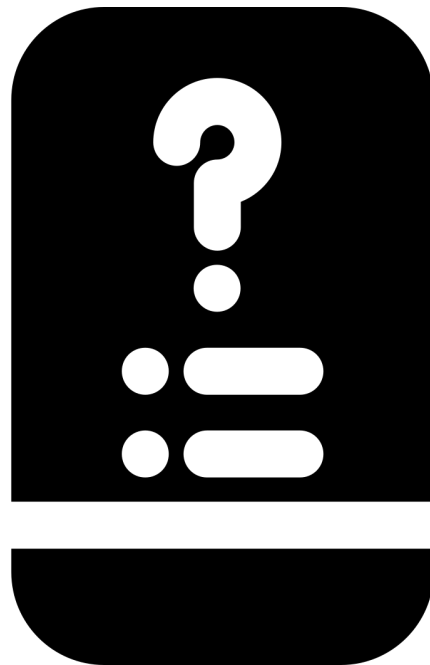


	FY13	FY14	FY15	FY16	FY17	FY18	FY19	FY20	FY21	FY22	FY23	FY24	FY25	FY26	FY27	FY28	FY29
— Total Town Assessments	\$8,988,4	\$9,213,1	\$9,604,	\$10,153	\$10,799	\$11,161	\$11,273	\$11,555	\$12,276	\$12,519	\$12,883	\$13,261	\$13,718	\$14,115	\$14,512	\$14,908	\$15,305
— % Change		2.50	4.25	5.72	6.36	3.35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

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?

AND THE SURVEY SAYS...



6 responses from
Steering Committee

STRENGTHS

PEOPLE

Committed staff, they care deeply about students

Athletics/Greg Lily

Older students mentoring younger ones

Supportive community

Diversity and inclusion

EDUCATION QUALITY

High school curricular redesign

Capstone project

Small classes

Uniqueness and traditions of elementary schools

PLACE

Great facilities

Rural/scenic location

NON-NEGOTIABLES

Athletic director and athletic programs

Arts, music, theatre, language programming – don't cut completely, could have fewer options with higher quality

Current bus routes, transportation

Spanish – should have starting in elementary school

District independence – no further regionalization beyond potentially full merger of Hawlemont into MTRSD



CHALLENGES & WEAKNESSES

Not enough AP courses for most advanced students

Elementary coursework not challenging enough

Behavior issues in 7th and 8th grade (better in high school)

8th graders behind peers in other schools (ie no Algebra, no language)

Perception of schools, misinformation

Students leaving to attend private, charter, and tech schools

Lack of racial and cultural diversity

OPTIONS, OPPORTUNITIES, POTENTIAL SOLUTIONS

- Slow the negative perception of the schools
- Consolidating all schools at MTRSD site
- Eliminate block schedule – align middle & high school
- Make preschool more efficient
- Look at staff numbers
- Have exit interviews with choice-out students
- Outreach to homeschool families (art, music, gym, sports)



10 YEARS FROM NOW

Financially sustainable

More populated

Fewer students leaving district

No unfunded state mandates

Upgraded facilities

Focused on highest quality opportunities

Athletics program continues to get stronger

Visual arts program

More attractive to high-achieving students



CONSIDERATIONS FOR RESEARCH TEAM



Consider socioeconomic health of towns.



Time is running out – all previous sustainability initiatives have failed for a variety of reasons.



Gather information from all corners of town – not just educators, administrators, parents.



Think about location rather than individual buildings.



What can we learn from the painful process of Heath closing?

QUESTIONS FOR RESEARCH TEAM

How do we compare with other school districts?

Ask for a comprehensive list of what the two districts need - what would they like to see added and deleted?

Can we get data on how many students leave the system, at what points, and to where?

How does the relative affluence of some of the towns affect planning?

Would like to hear more about why some towns did not go with BERK12 plan in Southern Berkshires.

Would you prefer representatives who are involved in town governance or are newcomers okay?

What were the issues related to the Heath closing? Where do those students go now?



WORK PLAN



H. Jake Eberwein, Project Manager
jakeeberwein@gmail.com

December 1, 2023

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

OUR PLAN.

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

	2024												2025			
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	...	Jun
Stage 1	█	█	█	█	█	█										
Stage 2					█	█	█	█	█							
Stage 3									█	█	█	█	█	█		
Final Report														█	█	█

....OUT OF THE GATE...QUICKLY.

Summary of tasks completed this month:

- Organization and submission of work plan
- Weekly meetings with districts lead team
- Preparation of overview presentation and delivery to both school committees
- Meeting with Town Managers
- Organization of Research team (Sheran, Rush, Nash, Putnam, Alexander, Abrahams group, BRPC, Dupere, FRCOG)
- Individual meetings and work planning with each member of the Research team
- Launch of historical review, contact with regional stakeholders
- Two-day visits with educational/outreach team to four elementary schools and the middle/high school
- Launch of initial data organization (enrollment, finance, buildings, educational indicators)
- Comprehensive document review of historical reports, synthesis and organization of themes
- Three Research team meetings (we meet every other week)
- All administrative work (contracts, required paperwork, invoices)
- Initial meeting with legislative delegation
- Development of overview communication plan and outreach schedule of Town SB/FC meetings
- Support for formation of Steering Committee and preparation for launch on February 3rd
- Development of website, draft website completed and reviewed, content populated, and website (2districts8towns.org) was made live mid-January - Ongoing content additions
- Ongoing communication with chairs and superintendent

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

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

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- 

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

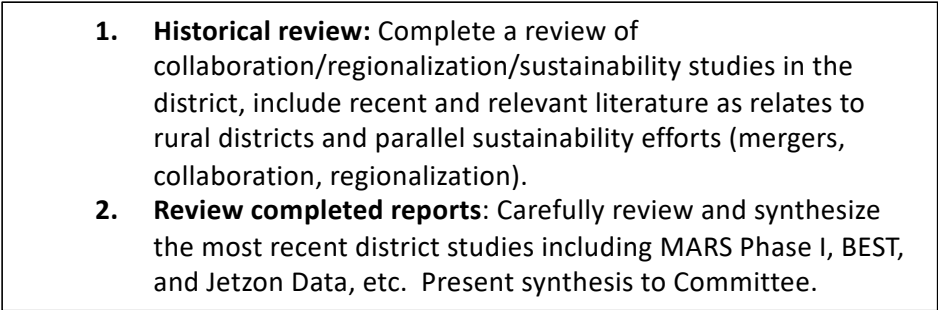
STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

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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

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- 1. 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).
 - 2. 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.

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

1. Setup
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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.

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT



Deliverables

- 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

ENGAGEMENT...PLANNING

Introductory meetings

School information and feedback sessions

Information table at large school events

Updates in school newsletters, local newsletters

Website and social media

Surveys among students, families, staff, community members, alumni, choice-out families, businesses



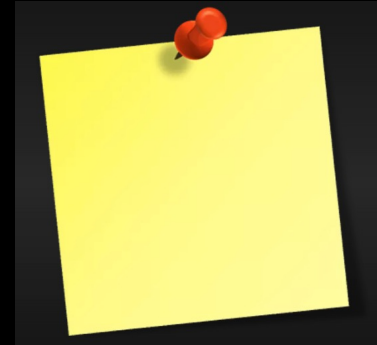
Activity	Target Dates	STEERING COMMITTEE	STAFF	STUDENTS	SCHOOL COMMITTEES	UNION	TOWN MANAGERS	PARENTS	SELECT BOARDS	LEGISLATORS	OPEN COMMUNITY	ELDERLY CITIZENS	ALUMNI	CHOICE FAMILIES
Introductory overview meeting ONLY	January - Feb	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Introductory overview AND feedback set	Feb - March	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Feedback Meeting (Interview/Focus Group)	March-April	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Community Survey	May	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Alumni Survey	May	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Choice-out Survey	May	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Monthly meetings	Ongoing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Monthly updates	On/around 15th of each month	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Targeted outreach	Ongoing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Website	Launch January, update ongoing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Social Media	Launch February, update ongoing	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Community Outreach & Engagement

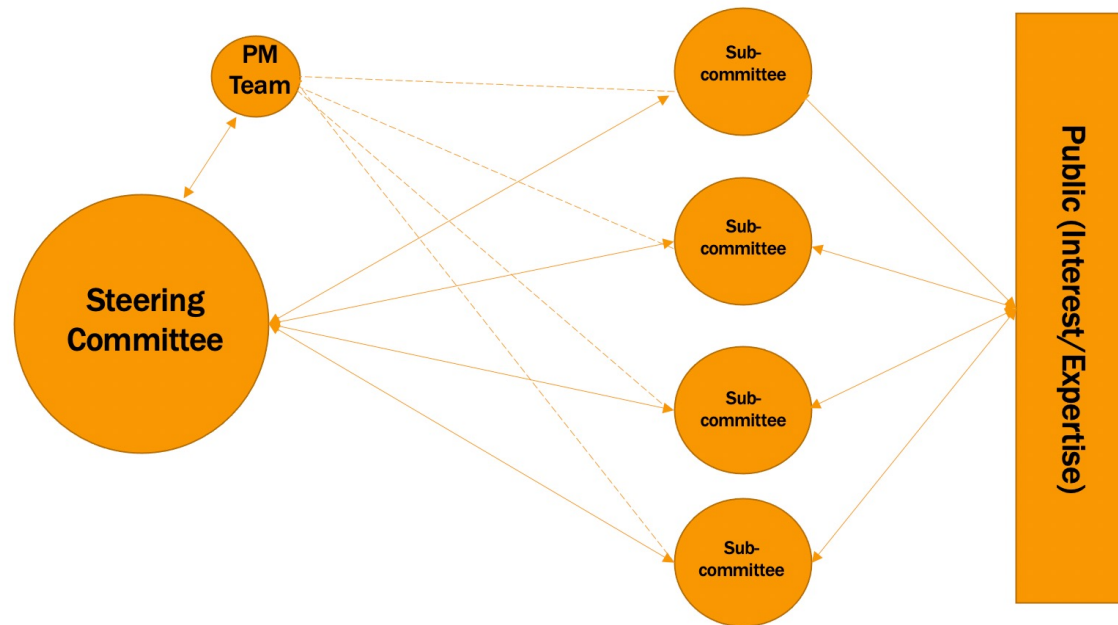
....THE NEXT MONTH.

- **Historical/Literature Review (Rob)**
- **Engagement: Engagement Meetings (Towns, Schools, Faculty/Staff) (Mary)**
- **Educational “Look” (Judy/Brendan)**
- **Enrollment updates (Mark, BRPC)**
- **Data organization (All)**
- **Finance/Buildings (TBD)**

SUBCOMMITTEES.



Possibilities:
Project Management (PM)
Education (Quality?)
Finance
Operations
Community Engagement/PR



8:50 - Announcements
8:55 - Classwork
9:15 - HAY
10:00 - Break
10:15 - WIN
10:45 - Math
11:30 - Recess
12:00 - Lunch
12:30 - ISS R
12:45 - Reading Groups
1:15 - Soc. Stud.
1:50 - Break
2:05 - Reading
2:55 - Read Aloud
3:12 - Dismissals

**MEETING
SCHEDULE,
NEXT?**

QUESTIONS/DISCUSSION/CONTACT.



BERK₁₂

Berkshire Educational Resources K12

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