



BERK₁₂

Berkshire Educational Resources K12

SUSTAINABILITY STUDY: PHASE II

2D8T Steering Committee

(2Districts8Towns.org)

H. Jake Eberwein, BERK12 Director
February 3, 2024

ICEBREAKER

Introduce yourself (include role and town you are from)

Prompt: Share an impactful memory from your school (K-12 days).





STOP

**YOUR
WORDING
HERE**

AGENDA

Agenda:

12:00 Lunch and Introductions

12:30-12:45 Introduction (Sheryl Stanton)

- Current Issues
- Rural Schools Report
- History of Sustainability Work in the Districts

12:45-1:00 Introduction of BERK 12 (Jake Eberwein)

- Who is BERK 12?
- 2D8T Workplan
- Steering Committee Role
- Elect Co-Chairs

1:00-1:45 Guided Discussion (Jake Eberwein)

- Strengths/Opportunities/Considerations
- Subcommittee recommendations

1:45-2:00 Wrap-up



INTRODUCTION

- Current Issues
- Rural Schools Report
- History of Sustainability Work in the Districts

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.



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THE PROBLEM.

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.

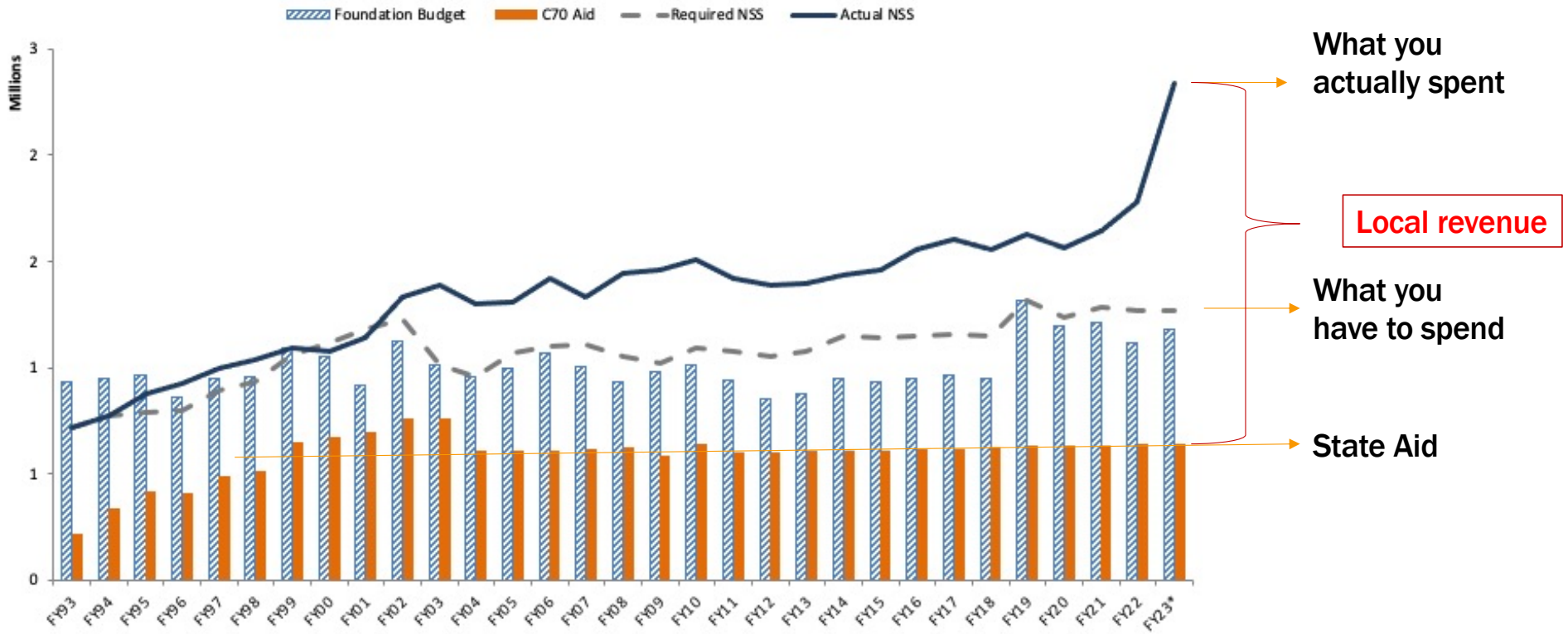
We must continue to explore options and opportunities - in light of these challenges - to ensure our students receive a high-quality set of educational experiences (academics, co-curricular, services and supports) they need to ensure success in college, career and life.



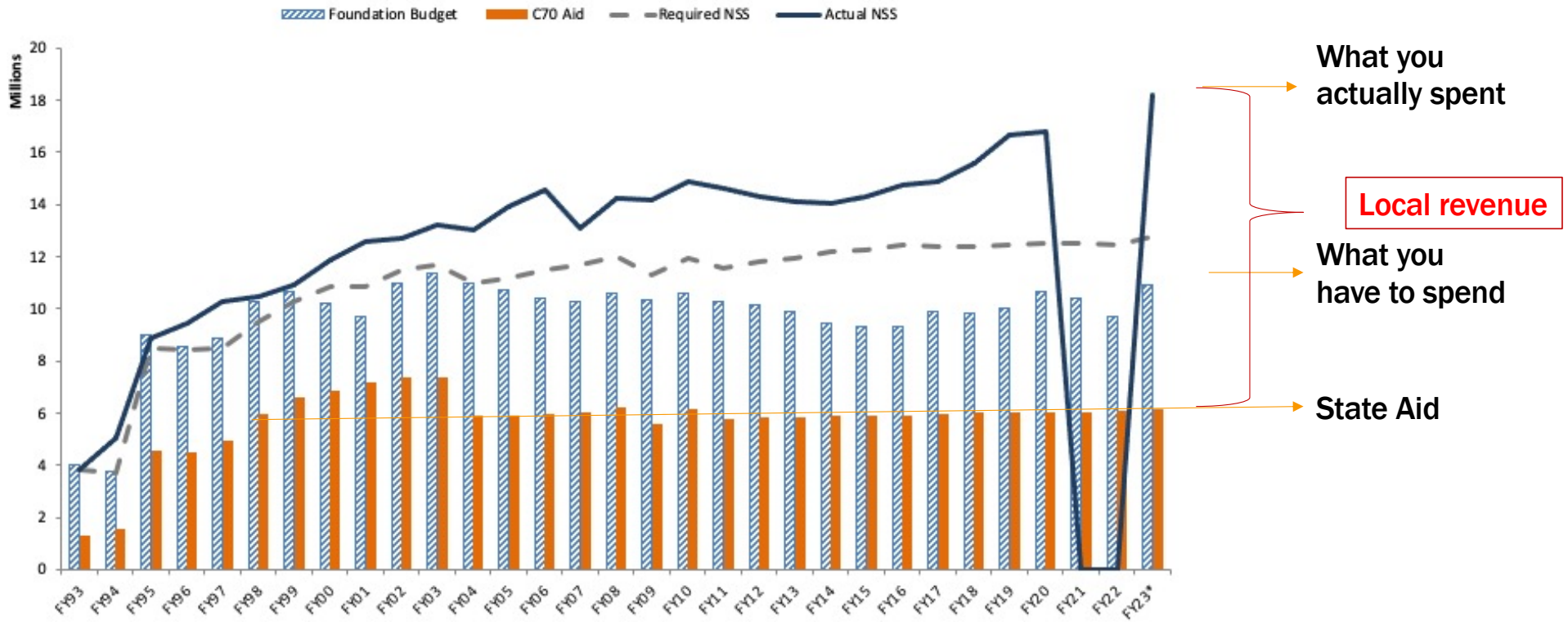
Massachusetts Department of Elementary and Secondary Education Chapter 70 District Profile

7/25/23

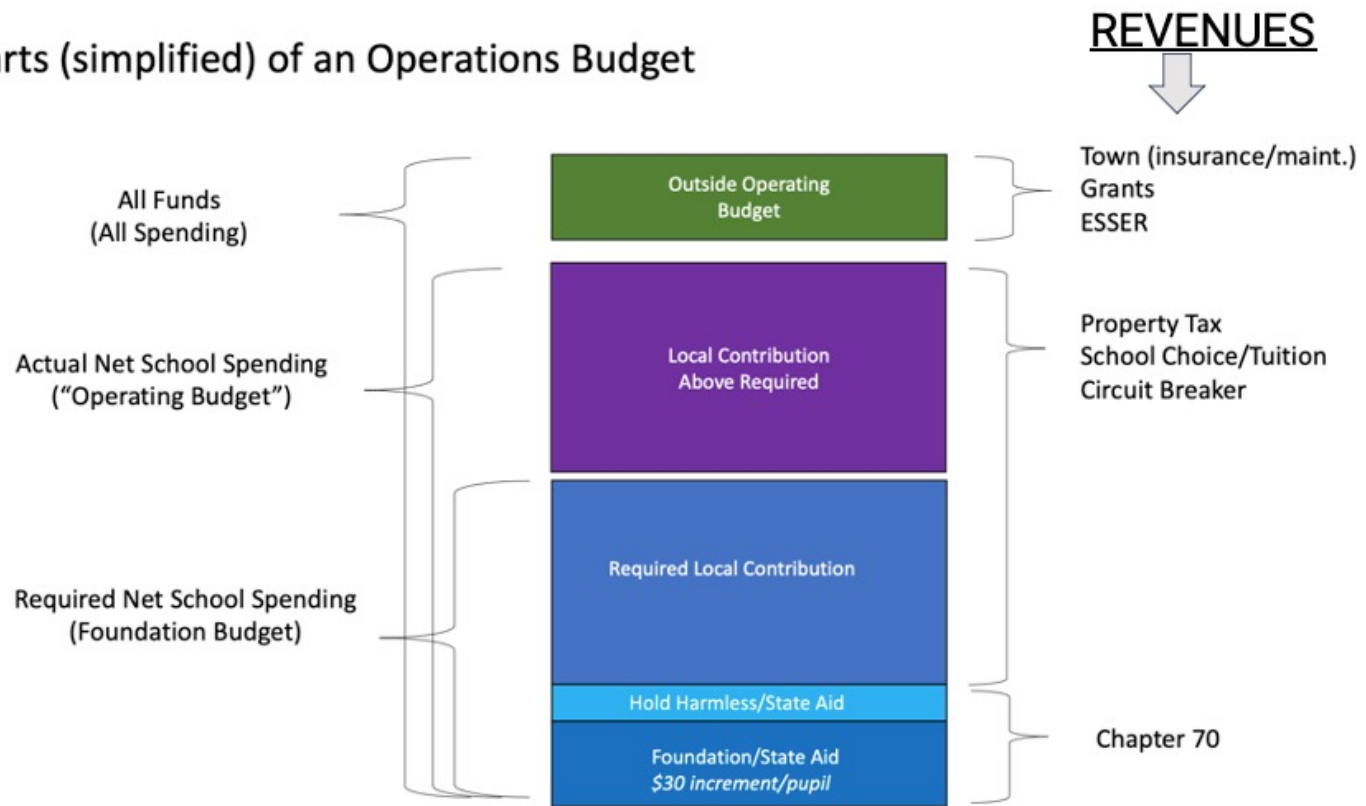
0685 Hawlemont



0717 Mohawk Trail



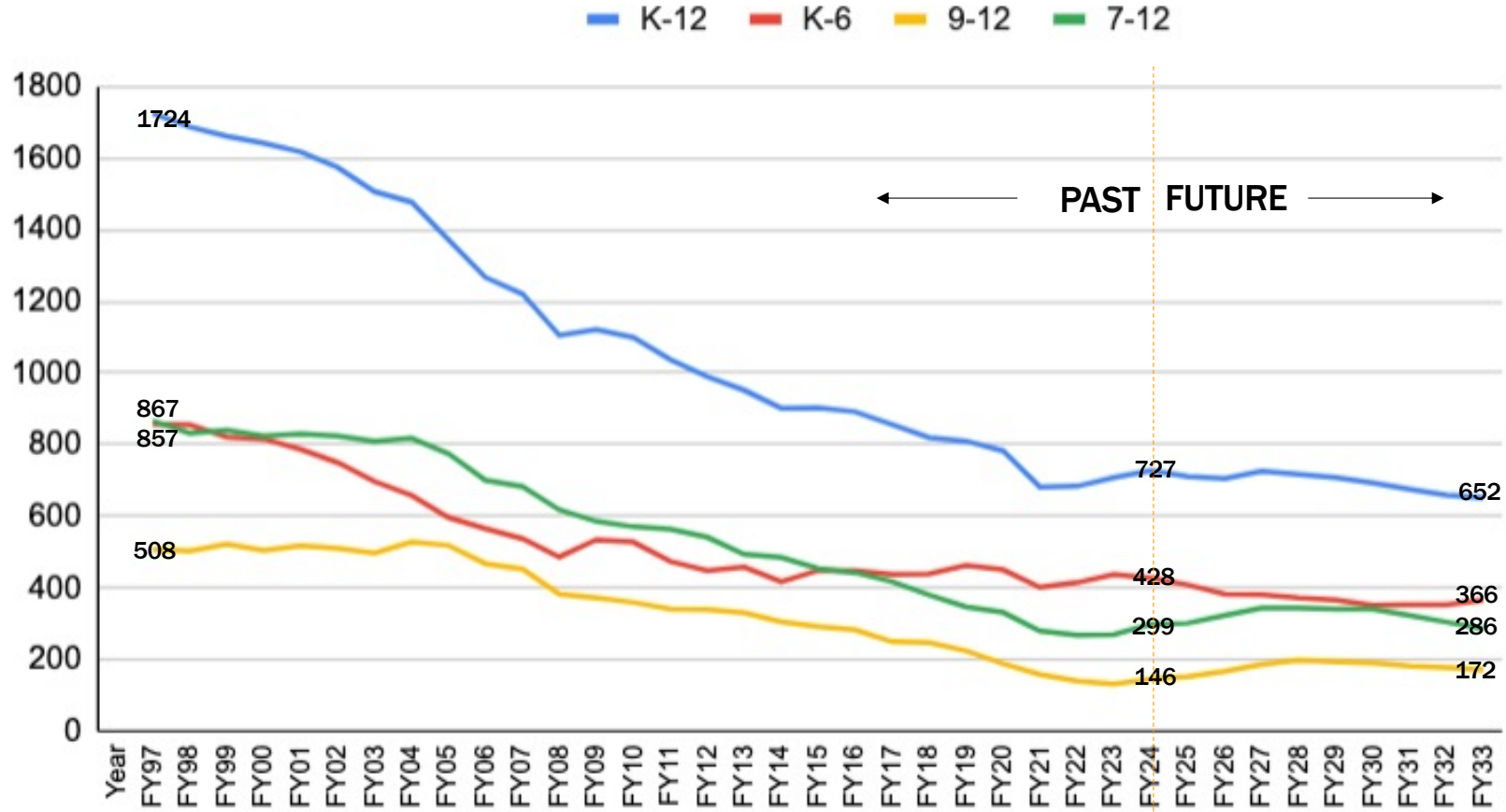
Parts (simplified) of an Operations Budget



FOR MORE ON CHAPTER 70 & SCHOOL FINANCE, VISIT [HERE](#) and [HERE](#)

MOHAWK TRAIL RSD

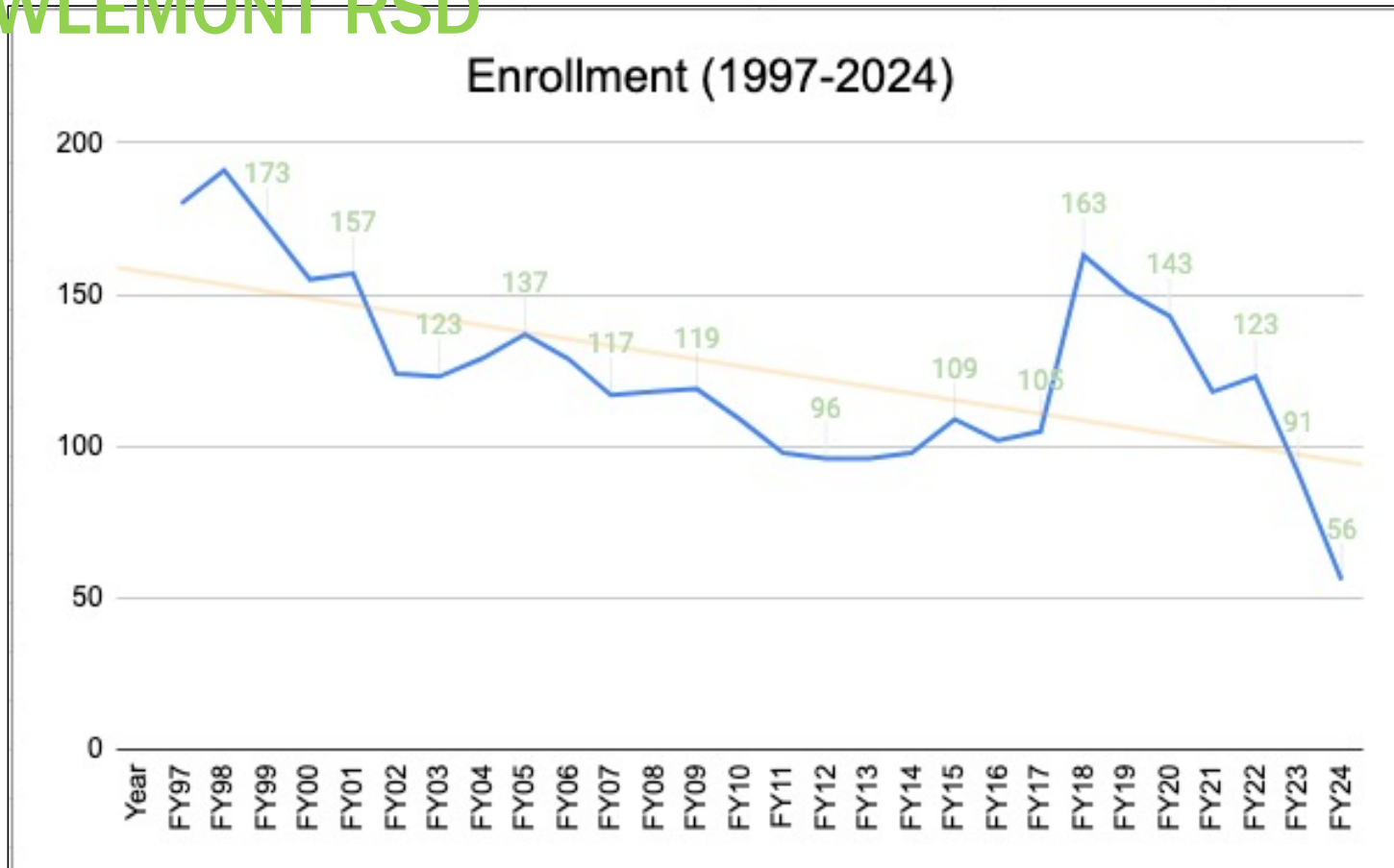
Enrollment (1997 - 2033 Projected)



SOURCE: DESE, MARS/NESDEC

GRADE SPAN	K-12	K-6	7-12	9-12
YEAR: 1997	1,724	857	867	508
YEAR: 2024	727	428	299	146
% Decline	57.8%	50.1%	65.5%	71.3%

HAWLEMONT RSD



SOURCE: DESE

Town	Population (2020)	Tax rate (2024)	Single Family Tax Bill (2024)	Tax bill as % of income (2024)	Average Single Family Value (2024)	Single Family Tax Bill (2024)	Total Assessed Value (2024)	Tax Levy (2024)	% Levy Residential (2024)	Excess Levy (Excess/Max Levy %) (2024)	Override capacity (2024)	Override Capacity as % of Levy Ceiling (2024)	Levy Ceiling (2024)	Total Expenditures (2023)	Education Budget (2023)	% Spent on Education (2023)	Stabilization Funds (% of Operating Budget) (2022-23)	Free Cash (% of Operating Budget) (2023)
Ashfield	1,695	\$14.61	\$5,260	17.77%	\$360,046	\$5,260	\$361,741,705	\$5,285,046	85.8%	\$8,125 (.15%)	\$3,931,366	43.47%	\$9,043,543	\$5,384,808	\$2,707,047	50.27%	\$500,054 (8.87%)	\$590,866 (9.3%)
Buckland	1,816	\$17.56	\$5,423	21.52%	\$308,806	\$5,423	\$285,640,695	\$5,015,851	84.5%	\$37,284 (.74%)	\$2,374,473	33.25%	\$7,141,017	\$5,118,544	\$2,909,738	56.85%	\$179,158 (2.87%)	\$297,919 (4.61%)
Charlemont	1,185	\$20.70	\$5,081	19.11%	\$245,460	\$5,081	\$172,504,537	\$3,570,844	84.0%	\$454,212 (11.28%)	\$287,557	6.67%	\$4,312,613	\$3,865,645	\$2,086,264	53.97%	\$356,493 (10.5%)	\$376,202 (8.9%)
Colrain	1,606	\$18.98	\$4,185	13.96%	\$220,506	\$4,185	\$211,415,426	\$4,012,665	84.0%	\$582,987 (12.69%)	\$979,634	18.53%	\$5,285,386	\$4,508,255	\$2,545,844	56.47%	\$1,012,264 (19.3%)	\$478,387 (10.41%)
Hawley	353	\$16.80	\$4,535	20.57%	\$269,915	\$4,535	\$60,371,564	\$1,014,242	89.3%	\$79,026 (7.23%)	\$416,021	27.56%	\$1,509,289	\$1,085,329	\$561,063	51.70%	\$286,656 (24.45%)	\$178,164 (15.2%)
Heath	723	\$20.43	\$4,516	28.89%	\$221,054	\$4,516	\$115,602,176	\$2,361,752	89.1%	\$284,597 (10.75%)	\$289,700	10.02%	\$2,890,054	\$2,633,386	\$1,014,345	38.52%	\$334,232 (11.64%)	\$65,155 (2.57%)
Plainfield	633	\$21.42	\$4,726	17.54%	\$220,647	\$4,726	\$120,570,482	\$2,582,620	68.6%	\$173,678 (6.3%)	\$459,050	15.23%	\$3,014,262	\$2,523,662	\$1,067,023	42.28%	\$556,065 (19.26%)	\$241,651 (9.1%)
Shelburne	1,884	\$13.26	\$4,459	17.73%	\$336,253	\$4,459	\$334,794,133	\$4,439,370	77.9%	\$665,143 (13.03%)	\$3,342,226	39.93%	\$8,369,853	\$5,066,565	\$2,810,402	55.47%	\$333,027 (5.86%)	\$333,596 (5.83%)

ABOUT US, WHAT.

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).

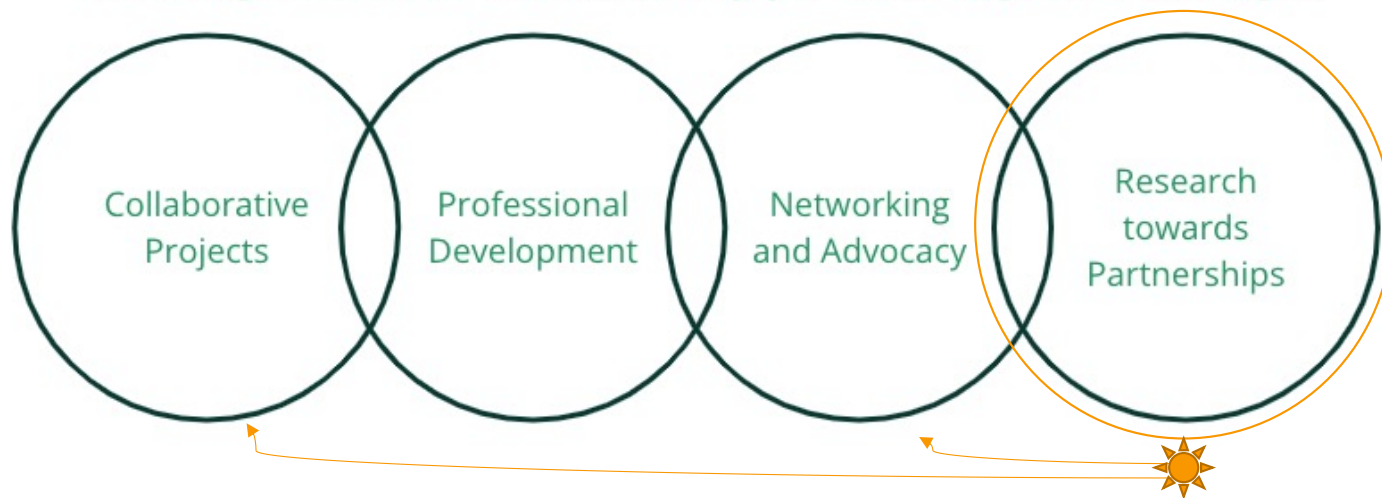


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ABOUT US, WHAT.

We bring educators & community partners together through:





8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

www.8towns.org

The screenshot shows the homepage of the 8 Town Regional School District Planning Board website. At the top, there is a navigation menu with links for HOME, WHO WE ARE, MEETINGS, RESOURCES, and NEWS, along with a search bar. Below the navigation is a large image of students sitting on a bench, reading books. A banner below the image reads "OUR SCHOOLS BETTER TOGETHER" and "VOTE AT YOUR SPECIAL TOWN MEETING". Below the banner are two links: "READ THE PROPOSED 8 TOWN REGIONAL AGREEMENT, HERE" and "READ THE 8 TOWN BOARD RECOMMENDATION REPORT, 9.26.23, HERE". A section titled "We Are Better Together" contains a paragraph about the board's goal and a link to "READ MORE". Below this is a row of five buttons: "FAST FACTS", "ENROLLMENT", "TRANSPORTATION", "EDUCATION", and "FINANCIAL FACTS". A section titled "8 TOWN RSDPB NEWS & UPDATES" contains a paragraph and a link to "READ MORE NEWS". Below this are three news items, each with a small image and a title: "A Rare Opportunity to do something that is good for Everyone's Wallets and for Their Children", "Find the Time & Place for Your Special Town Meeting", and "Let's Talk! Conversation with Jesse Stewart of WSBS". To the right of the news items are three buttons: "READ THE REGIONAL AGREEMENT", "RECOMMENDATION REPORT", and "WHAT DOES A YES OR NO VOTE MEAN". At the bottom right is a "FULL CALENDAR" button.

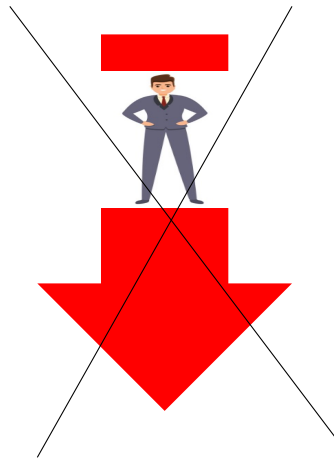
CHARGE.

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



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.



BUILDING UPON YOUR WORK.

- Potomac Reports (2013)
- Long Range Planning Committee (2015)
- BEST Study (2016/2017)
- Jetzon Data Report (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

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



IS THERE A SOLUTION?

OUR APPROACH.





OUR APPROACH.

Domains:

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

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														█	█	█

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

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

STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

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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.

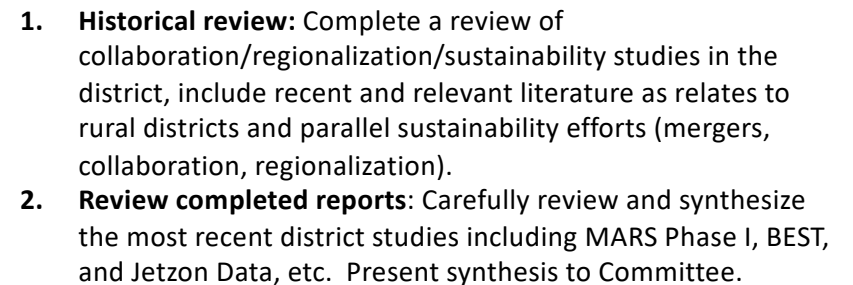
STAGE 1. ORGANIZATION, CONTEXT, INITIAL ENGAGEMENT

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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**
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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
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.

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

....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

STEERING COMMITTEE

TASKS

THOUGHT PARTNERS

REVIEW/CRITIQUE/ENHANCE DELIVERABLES

EVALUATE (OPTIONS AND OPPORTUNITIES)

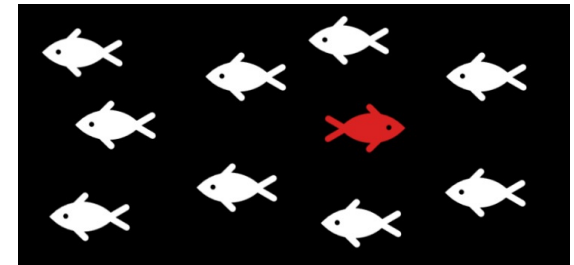
COMMUNICATION (TO-FROM)
& ADVOCACY



....WE ARE A COLLECTIVE..WE:

- **Commit** to both attending and regularly participating in all (most) meetings,
- Will **learn** from each other and together by listening, sharing, studying, acting...and both failing and succeeding,
- Acknowledge, **share** responsibility for, and accept ownership for the challenges that exist, and those that will certainly arise.
- Are passionate members of our community willing to (systems) **think beyond** their personal/organizational interests in advocating for adaptive and shared regional solutions based on identified priorities/interdependencies.

Of course, partners will need to have burning patience and relentless (optimistic) persistence.



...AS WE PARTNER

adapt.flex.adjust.

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, facilities)

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

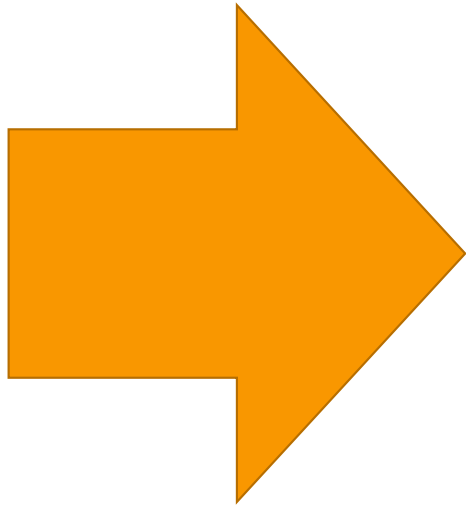
Russell Dupere (legal, regulatory)

Caroline Alexander (website development)

LESSONS FROM SOUTH COUNTY

- This is not a quick process, requires time and broad engagement
 - That said... many will not pay attention until the decision is directly in front
 - A team effort...requires specialized expertise
 - Complicated work... that must be simplified (too much...too little)
 - Models are projections...and will be challenged
 - Compromise will compete with self-interest... Facts will compete with emotion
 - Unintended consequences regardless of decision (both good and not-so-much)
 - Management, commitment & champions!
- 
- Work with key stakeholders to reduce disincentives, increase incentives.
 - Tap into credible voices at local/regional/state level
 - Engage, engage, engage (and be fully transparent about it)

PREPARE FOR...



Your data is flawed.

Your people are/analysis is flawed.

Your interests and conclusions are pre-determined.

The distribution of assets/costs/people/kids....is not fair.

Geography/travel is impossible to solve.

Our schools drive our economy.

Our schools are our community centers.

No evidence (the solution) will save money or improve student experiences/outcomes.

We like our small schools, kids get lost in larger schools.

Not enough detail (or....too much detail).

Fear of cuts/layoffs.

What about our empty schools.

Our enrollment will rebound because of _____(fill in the blank).

Town/school cultures are unique and too different.

We just need to *steal* kids from the neighboring districts/towns.

You're moving too fast (you're moving too slow)

I can't think about this now, too busy.

I'd consider this once my kids are out of school.

Why not just collaborate?



How can we best engage stakeholders within the schools and towns?

2Districts8Towns.org

2 DISTRICTS, 8 TOWNS SUSTAINABILITY STUDY



News from Our Team

• SCHOOL COMMITTEES REVIEW AND APPROVE PROPOSAL:

- The Hawlemont and Mohawk Trail Regional school committees were presented an overview of the proposal sustainability study, link [HERE](#) to review.

OUR CHARGE.

To support ongoing study and analysis of the operating and organizational structures of the two

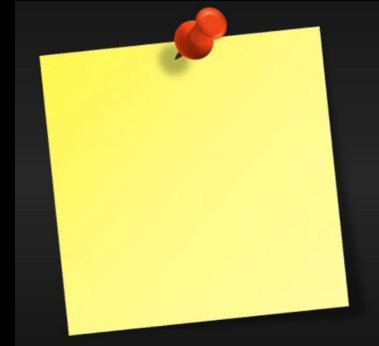
Activity	Target Dates	STEERING COMMITTEE	STAFF	STUDENTS	SCHOOL COMMITTEES	UNION	TOWN MANAGERS	PARENTS	SELECT BOARDS	LEGISLATORS	OPEN COMMUNITY	ELDERLY CITIZENS	ALUMNI	CHOICE FAMILIES
Introductory overview meeting ONLY	January - Feb	✓	✓	✓	✓	✓	✓							
Introductory overview AND feedback set	Feb - March							✓	✓	✓	✓			
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

CHAIR



GROUP CHAT.



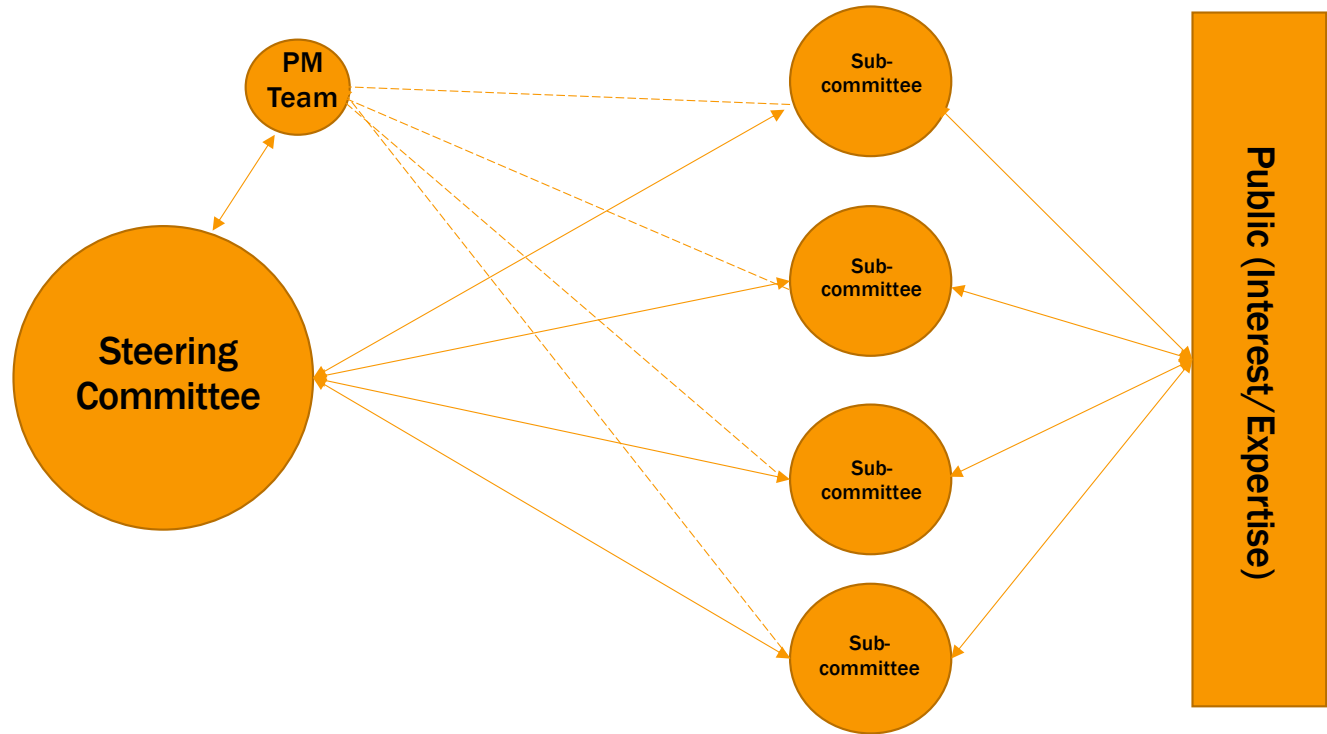
Using Stickies.....brainstorm the following:

- 1. What are the strengths of the districts/schools?** (practices/culture) – what the districts/schools do well, we highly value and appreciate, what we would protect at all costs and could not do without.
- 2. What are the challenges of the districts/schools?** (practices/culture) – where are their weaknesses, tension points, ruts, gaps, things you'd like to change.
- 3. What options and opportunities do you feel exist and could capitalize on strengths and address challenges?**
- 4. Where should (would you like) the districts to be in 10 years?**

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.



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Jakeeberwein@gmail.com

413.329.4336