



BERK₁₂

Berkshire Educational Resources K12

SUSTAINABILITY STUDY: PHASE II

Town Select Boards and Finance Committees

(2Districts8Towns.org)

H. Jake Eberwein, BERK12 Director
Feb/Mar 2024

AGENDA

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





STOP

**YOUR
WORDING
HERE**

CHARGE.

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





RESOURCES

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

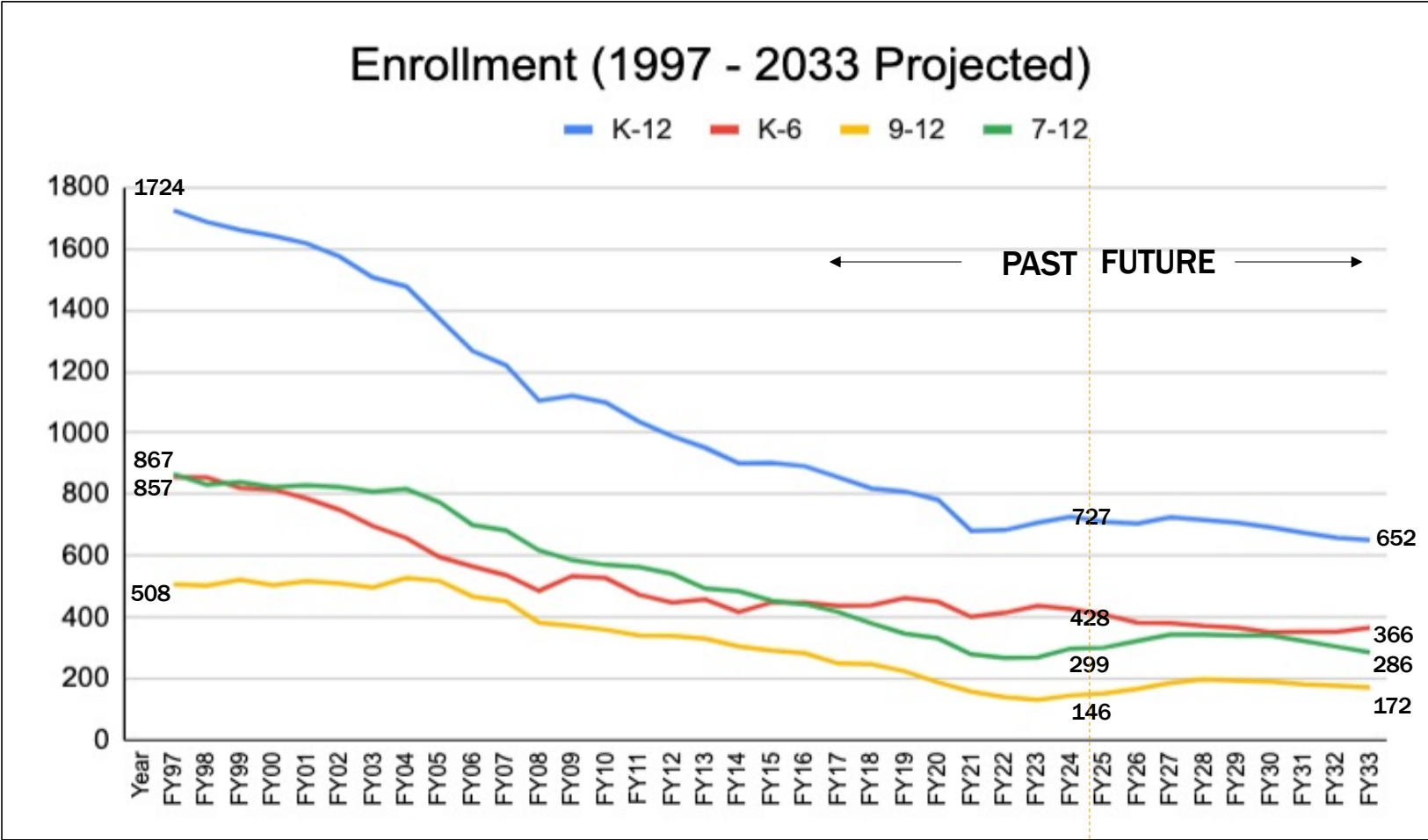
THE PROBLEM.

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.

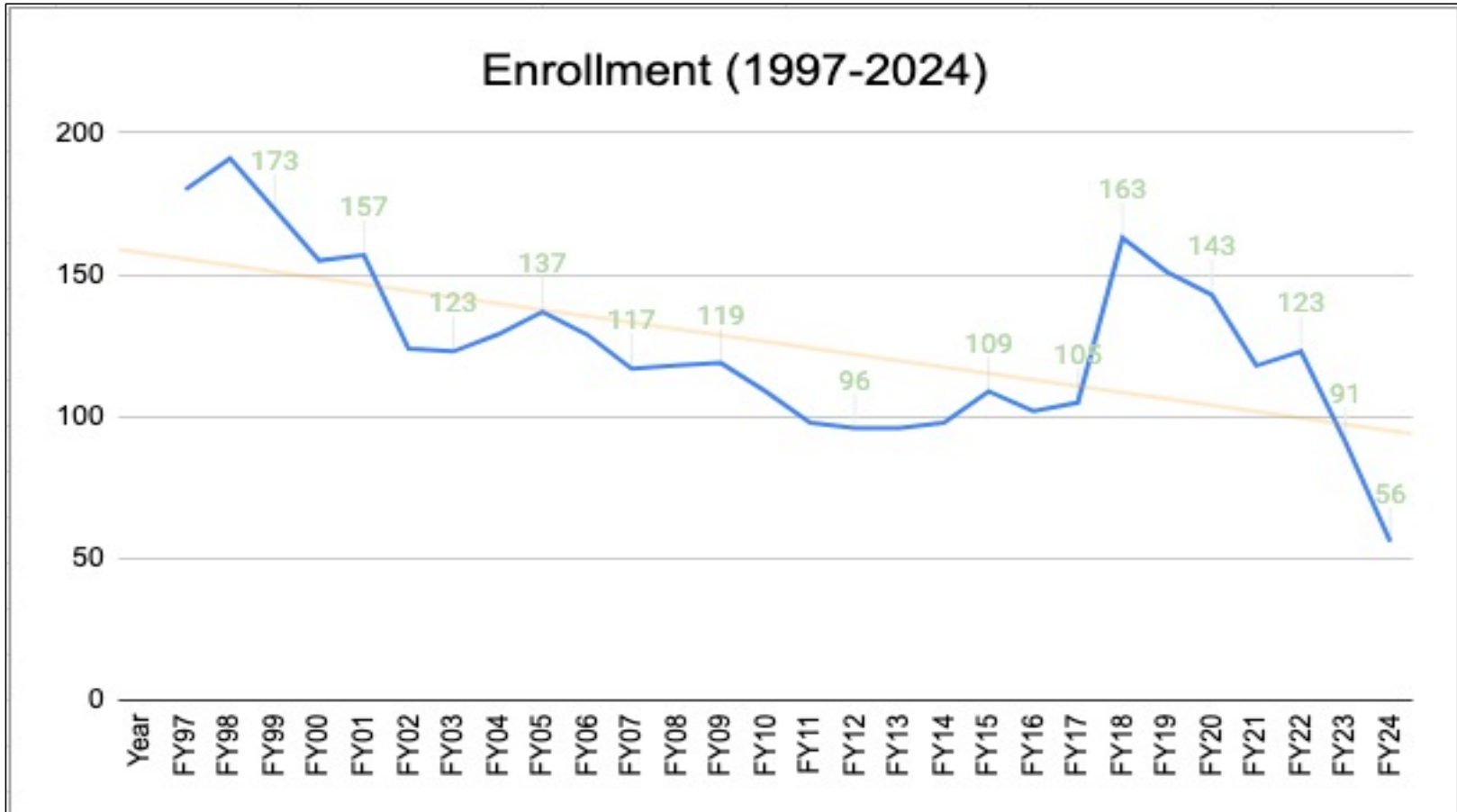
We must continue to explore options and opportunities - in light of these challenges - to ensure our students receive a **high-quality set of educational experiences** (academics, co-curricular, services and supports) they need to ensure success in college, career and life.

MOHAWK TRAIL RSD



SOURCE: DESE, MARS/NESDEC

HAWLEMONT RSD



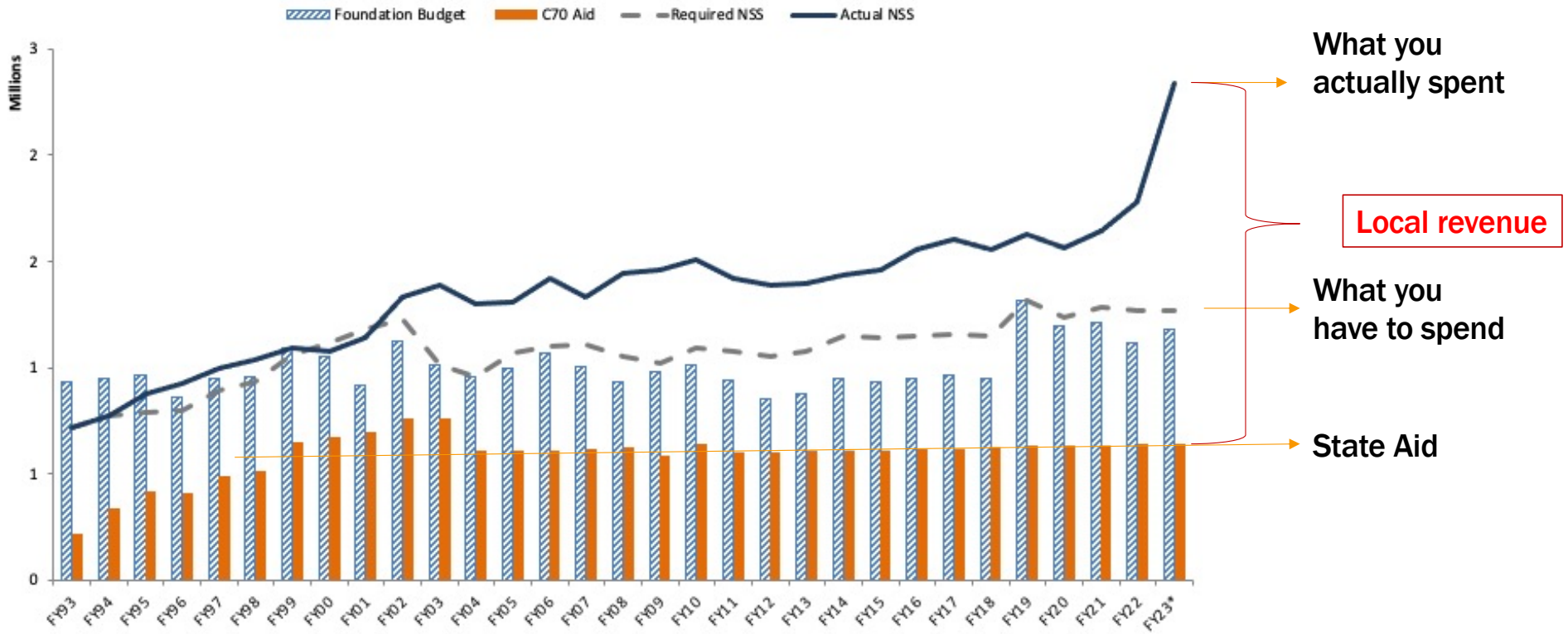
SOURCE: DESE



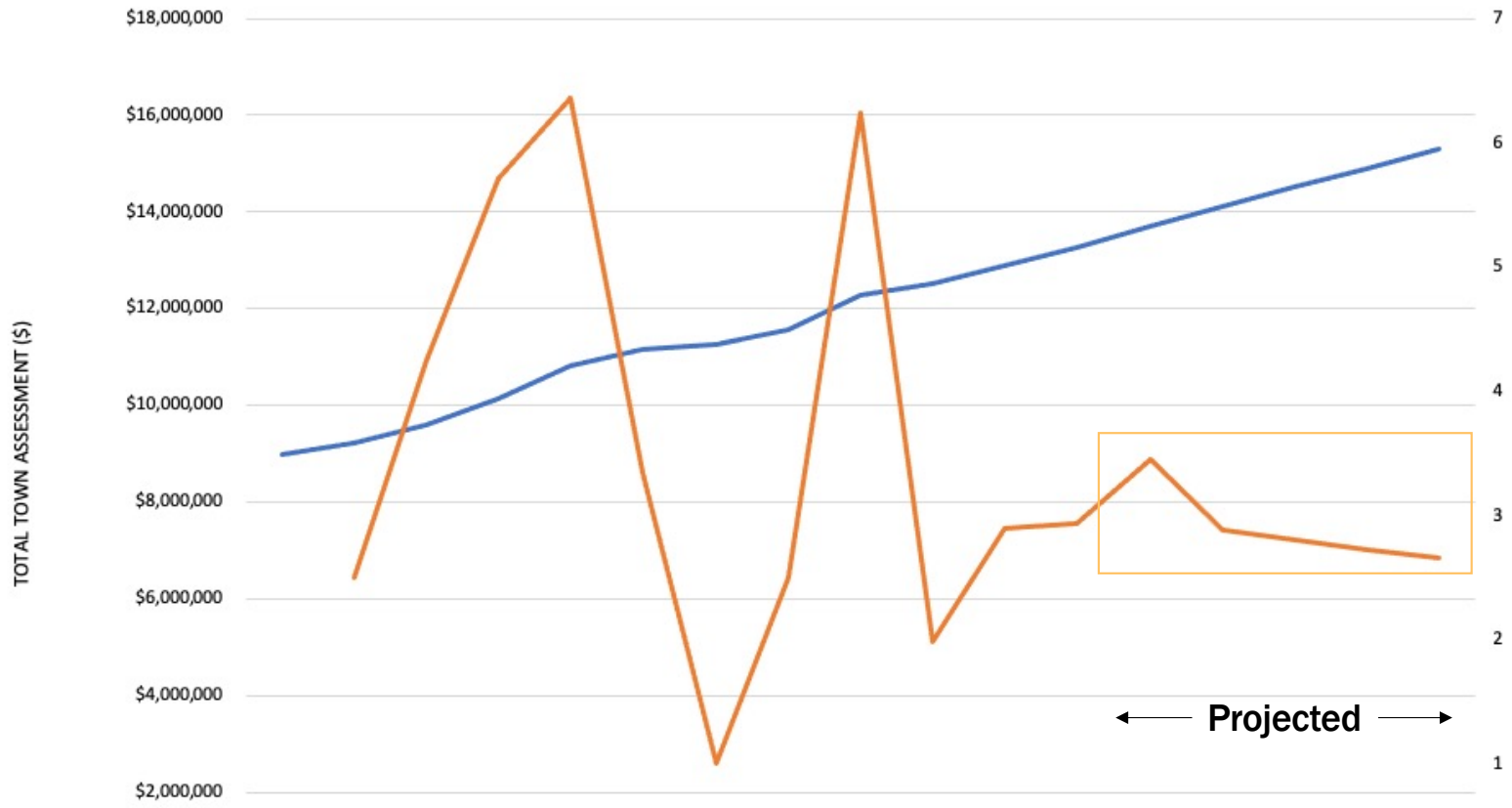
Massachusetts Department of Elementary and Secondary Education Chapter 70 District Profile

7/25/23

0685 Hawlemont



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



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

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%)

Town Financial Variables....part of the equation...

ABOUT US.

We bring school and community partners together

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



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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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ABOUT US, WHAT.

We bring educators & community partners together through:

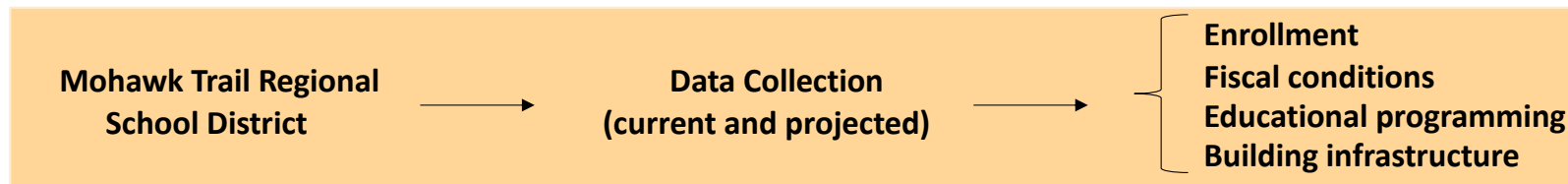


OUR APPROACH.



BUILDING UPON PRIOR WORK.

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



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

OUR AIMS.

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

1

Analyze data as provided in Phase I

ANALYSIS

2

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

PROJECTION

3

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

OPTIONS

4

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

MODELING

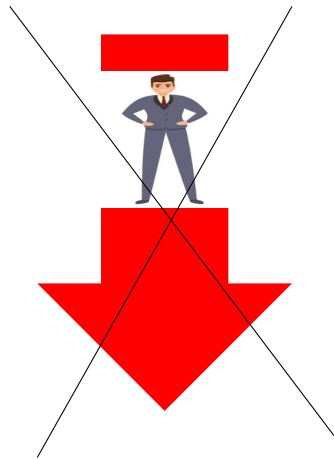
5

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

ENGAGEMENT

ASSET-BASED APPROACH

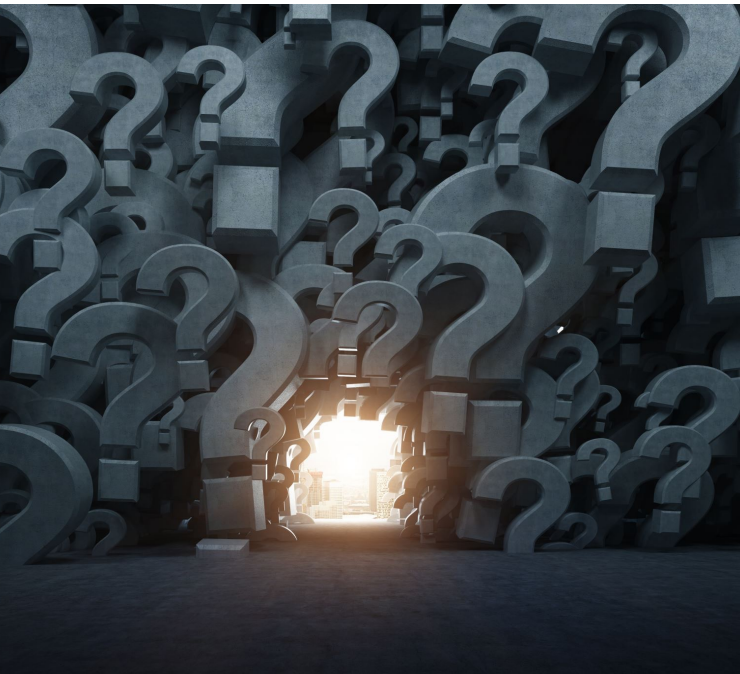
Mobilize the **energies, talents & perspectives** of local communities to develop the innovative, sustainable solutions needed to advance educational excellence for all students across rural regions.





DOMAINS.

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



IS (ARE) THERE A SOLUTION (S)?

OUR PLAN.

CONTEXT

Stage 1. Process Organization, Context Setting, Community Engagement (A)
Target dates: January 1, 2024 through May 1, 2024

OPTIONS

Stage 2. Deep Data Dive & Analysis, Option Generation
Target dates: May 1, 2024 through August 1, 2024

MODELING

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

Final Report Delivery: SPRING, 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

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

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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.

...AS WE PARTNER

adapt.flex.adjust.

....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; bi-weekly group research team meetings
- 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
- 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, 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



STEERING COMMITTEE

MEMBERS

Open seat, Ashfield

Paula Consolo, Buckland, Finance Committee

Jenny Van Wyk, Colrain, Parent and Educator

Open seat, Charlemont

Ellen Purinton, Hawley, Community Member

Elizabeth Finn, Heath, Parent

Judy Cole, Plainfield, Select Board

Paul Hollings, Shelburne, Community Member

Robin Pease, Mohawk Trail/Hawlemont Director of Facilities and Transportation

Kristen Tilona-Baker, Executive Director, Mary Lyon Foundation

Sheryl Stanton, Mohawk Trail/Hawlemont Superintendent of Schools

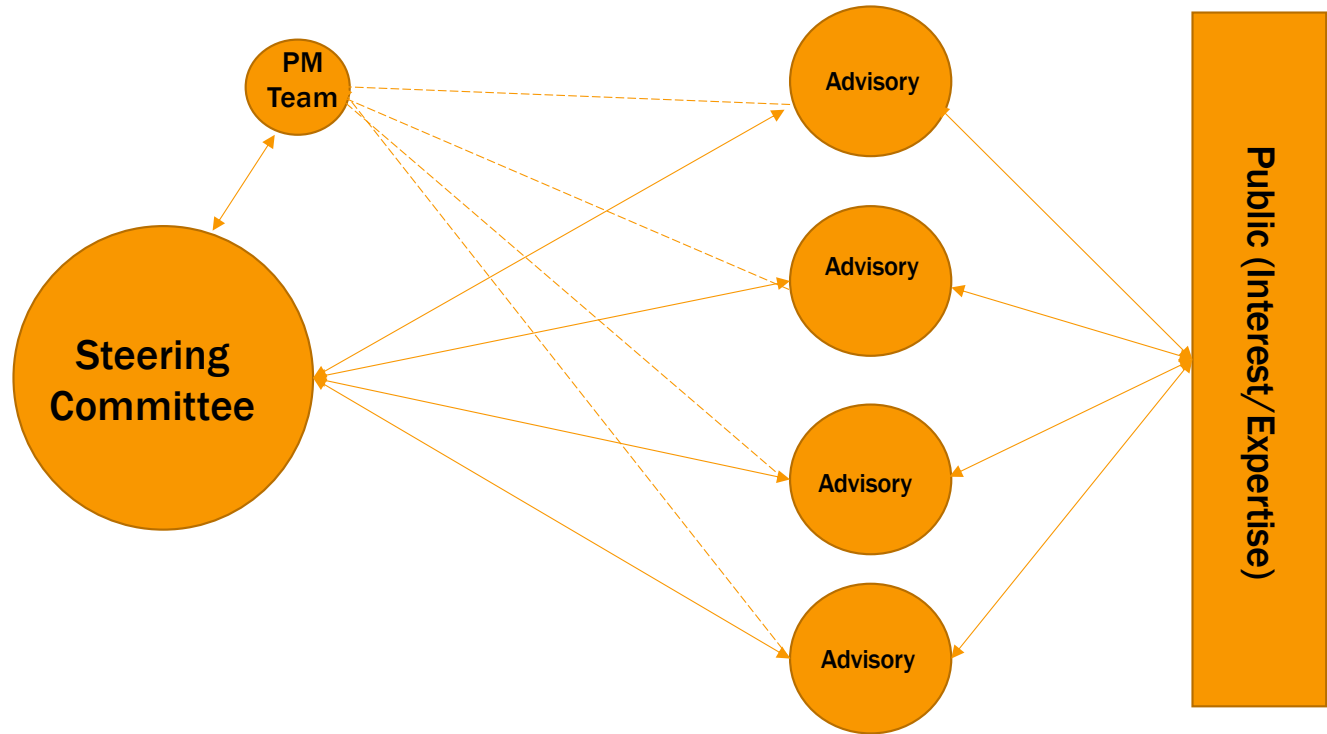
Martha Thurber, Chair, Mohawk Trail School Committee

Elizabeth Van Iderstine, Chair, Hawlemont School Committee



ADVISORY TEAMS

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



ADVISORY TEAM



2Districts8Towns

HOME WHO WE ARE RESOURCES CONTACT

SEARCH



Interested?



2 DISTRICTS, 8 TOWNS SUSTAINABILITY STUDY

OUR CHARGE.

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



News from Our Team

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

OUR 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)

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?

FOLLOW-UP FEEDBACK

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



SURVEY

Introductory questions for Mohawk Trail & Hawlemont Sustainability Study

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

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

Thanks for your feedback!

QUESTIONS/DISCUSSION/CONTACT.



BERK₁₂

Berkshire Educational Resources K12

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