Background and Context

The Berkshire County Education Task Force (BCETF) is a group of current and former school administrators and educators, school committee members, town administrators, and local business leaders, higher education officials and others who have met 32 times since July, 2015 to explore ways Berkshire County can address the challenge of erosion of educational quality due to declining student enrollment and revenues that are not keeping pace with costs.

In February 2017 the Task Force framed its purpose this way:

We believe that a high quality education is the right of every child in Berkshire County. We are exploring and seeking options that will provide the best opportunities and outcomes from and for our schools and school districts at a time of declining population and resources.

...(Our) intent... is to develop and recommend solutions that:

- Enhance access, diversity, breadth and quality of educational programs for children countywide so they are fully prepared for college, career and a life here in the Berkshires;

- Create economies of scale (financial savings) through new collaborations, technologies, partnerships, and regional agreements between and among towns/cities and districts;

- Advance new investments in collaborative solutions (e.g. expanded pre-K programming or special education services) that enhance educational services and opportunities for children countywide;

- Maintain and honor the unique identity of each Berkshire community, ensuring citizens remain fully connected and engaged with their schools; and

- Are sensitive to age appropriate social and learning practices, in matters such as transportation/travel time and the number of school/grade transitions.¹

Highlights of Phase One Work and Findings

In 2016 the Task Force contracted with the UMass Donahue Institute to conduct the first of a two-phase study to review and confirm available evidence that decreasing enrollment, rising costs, and declining or flat revenues pose challenges to the quality of education in Berkshire County, and therefore threaten economic development of the region. In addition, the Phase One study was intended to generate insight into the potential benefits and risks of inter-district shared services and school district consolidation strategies, as well as ways that the costs of

¹ Excerpted from the BCETF Framing Document, February 2017; see Appendix A for the full document.
these strategies have been modeled. The Task Force planned to model costs associated with shared services and consolidation in Phase Two.

In its October 2016 Phase One Report, the Donahue Institute offered these conclusions:

- Overall school district enrollment decline will continue: Berkshire school districts saw an enrollment drop of 22% between 2000 and 2015; the Donahue Report projected an additional decline of 11% between 2015 and 2025, leaving total public school enrollment at approximately 14,000, with more enrollment decline to come over the following decade.
- As enrollment has declined and cohort and class sizes have grown smaller, per pupil costs have grown.
- State and federal aid for education has not kept pace with rising costs, and is unlikely to do so in the future: because aid is based heavily on student enrollment, enrollment decline has and will continue to adversely impact state and federal aid.
- The capacity of cities and towns to raise local taxes to address rising costs has declined overall: with assessed property value stagnant in a number of Berkshire communities and costs rising, cities and towns are reaching their levy limits.

The Donahue Report concluded “…the quality of education in Berkshire County is being threatened…with program impacts already being experienced in some districts and signs of potential program impacts over time in most districts”.

The Phase One Report left Task Force members convinced that without effective action, Berkshire County will see economic development stymied by decreasing quality and rising costs of public education as declining enrollment and lost learning opportunities continue for the foreseeable future.

**Summary of Phase Two Work**

In February 2017, the Task Force contracted with The District Management Group (DMG) to support these five components of its Phase Two work.

1. *The Task Force identified stakeholders’ goals*

   The Task Force recognized it would need goals that are specific enough to judge progress and success. They worked with DMG to develop educational and financial goals. In small groups Task Force members shared their aspirations for Berkshire County education. Task Force members refined and used a protocol drafted by DMG to conduct public input
sessions and an on-line survey that reached more than 400 stakeholders. The Task Force reviewed a summary of findings. From this data, the Task Force developed goals to guide assessment, accompanied by a preamble designed to convey their purpose. Two goals focused on educational outcomes for students, and one focused on financial equity and sustainability.

2. **DMG shared “lessons learned” from failed and successful district consolidation efforts within and beyond Massachusetts.**

Task Force members examined their implications for the scenarios to be modeled and the criteria to be used in the modeling. The Task Force wanted to learn more about why so few regionalization and shared services efforts have been successful in Massachusetts and beyond. Members sought to understand best practices and emerging approaches, and asked probing questions about the presentation on “lessons learned”.

3. **With DMG support, the Task Force identified and refined scenarios aimed at achieving the goals, eventually choosing five scenarios:**

   Scenario #1: Make no change
   Scenario #2: Establish three (3) regional “modified supervisory unions”
   Scenario #3: Establish a single countywide “modified supervisory union”
   Scenario #4: Establish three (3) regional school districts
   Scenario #5: Establish a single countywide school district

4. **With Task Force input and refinement, DMG modeled the likely impacts of each scenario.**

   Using an ease-impact framework to organize its display and analysis, DMG proposed rating each scenario against multiple dimensions designed to take into account the three goals identified by the Task Force (impact) and “lessons learned” about district consolidation efforts (ease). Task Force members offered refinements to the plan for modeling. The final modeling applied 34 dimensions, clustered across five broad areas:

   #1 Educational Factor: student access to high quality offerings  
   #2 Educational Factor: student access to support services  
   #3 Financial Factor: stability and sustainability  
   #4 Implementation Factors  
   #5 Operational Factors

5. **Task Force members examined the analysis presented in the Phase 2 Report to determine what recommendations for action to make.**
Step 1: Stakeholders’ Goals

With DMG’s support, the Task Force designed regional outreach meetings to hear directly from stakeholders about their aspirations for education in Berkshire County. Task Force members facilitated six sessions in April involving close to 200 people:

- In Dalton at Wahconah Country Club
- In Great Barrington at Berkshire South Regional Community Center
- In North Adam at MCLA Church Street Center
- In Pittsfield at Berkshire Community College (3 different sessions)

In addition, a modified protocol was used to give opportunity for students at seven high schools to weigh in, as well as union leaders at a special meeting of the Berkshire County Union Presidents’ Meeting. Finally, stakeholders unable to participate in face-to-face meetings were invited to complete an on-line survey, responding to two of the same questions asked of participants in the face-to-face dialogues:

- What is an especially important element of quality education to preserve or develop for Berkshire County children?
- What questions or advice do you have for the Berkshire County Education Task Force?

The ten most frequently mentioned categories of aspirations, not in order of frequency, were:

1) Ensure access to high quality/rigorous education for all (including course rigor and availability and teacher expertise)
2) Increase arts, electives, AP, extracurricular offerings (including foreign languages)
3) Provide better access to more career pathway (vocational programs/technical skills) offerings at high school level
4) Build strong support services (special education, ESL, social-emotional)
5) Increase collaboration (and/or consolidate some services) between districts within Berkshire County system
6) Value, support and compensate all educators
7) Collaborate as a community to improve family outreach programs (i.e., libraries, food security programs, parent education, etc.)
8) Increase individualized attention and cultivate student autonomy
9) Maintain and promote a strong sense of pride and ownership for community
10) Increase access to technology that is integrated with learning to prepare kids for 21st century and beyond

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4 See Appendix A for BCETF’s Framing Document for the outreach meetings and Appendix B for a report on the meetings and survey.
Drawing on results of the Phase One research and the results of the aspirations outreach, Task Force members established three goals to guide the development and assessment of scenarios. Because they wanted to be explicit with stakeholders about the purpose of the goals, they developed a preamble:

The Berkshire County Education Task Force has as its first priority ensuring that all Berkshire Country students are prepared to succeed at each step of their personal and educational development and leave high school well prepared for informed citizenship and success in a changing, global world. Based on our study of conditions in Berkshire County and the aspirations of the 400+ students and adults who participated in our April 2017 Aspiration Outreach Meetings and Survey, we have identified these three goals against which we will assess the options we are examining to address the fiscal and demographic challenges Berkshire County faces.

The Task Force identified two goals focused on improving education and one focused on financial sustainability:

Goal #1: All students will have improved and more equitable access to - and opportunity for success in - high quality career pathways, enrichment and elective courses, and co-curricular activities.

Goal #2: All students will have enhanced safety nets to support their academic and life success, e.g., guidance counseling, reading services, curriculum for social-emotional learning, special education services.

Goal #3: Taxpayers will have a more equitable and fiscally sustainable way of funding education and other municipal services.
Step 2: Lessons learned about regionalization

DMG shared with members of the Task Force experiences other states and districts have had with regionalization efforts. DMG highlighted seven “lessons” it has gleaned from those experiences and research, pointing out that while each is generally true, there have been exceptions.

1. **Mergers between “similar” districts have more support**
   - Districts with similar enrollment, demographics and “culture” often are more comfortable joining together.
   - Districts with past partnerships such as youth sports leagues, shared staff or shared services are more easily united.

2. **Broad based support, including school committee support, is key**
   - School committees need to help draft the plan, not just approve/endorse it. For example, the Vermont study group concept worked well to create school committee endorsements.
   - Merger can’t be forced on districts by other town boards or groups.
   - Having multiple and varied groups supporting the effort, and communicating in concert, helps sway less informed community members.

3. **Most efforts to merge school districts fail, despite a strong economic justification**
   - Fear of loss of local control and jobs often overrides financial pressures.
   - Often, opponents feel harmed much more than proponents are helped; thus, opponents often expend more energy than supporters.
   - Gains for students, protections for others, and financial benefits are all needed.

4. **Carrots and sticks work best in tandem**
   - The benefits can’t just be “things won’t be bad if we consolidate”.
   - Vermont’s unprecedented success (20 approved mergers, more than 107 districts) was given urgency by tax incentives for unifying quickly and penalties for not unifying or unifying later.

5. **Sometimes very specific and binding promises are required to reduce opposition**
   - In some communities, very specific concerns arise (ABC school will be closed, long time business manager will be let go, favorite program will end, etc.).
   - A legally binding commitment may be warranted/needed to stem the concern (no school closings for x years, no involuntary staff cuts, such and such program will continue for y years, etc.).
6. Partial merger can be a helpful intermediate step

- Shared services or shared central office staffing is often the first step toward full regionalization, e.g. expanded supervisory unions.

7. Mergers don’t assure benefits to students or taxpayers

- Sometimes mergers only have minimal impact...
- ...because there is only a vague sense of “things will be better” rather than specific commitments.

The Task Force members concluded that it wanted to take these lessons into account as they identified and assessed scenarios for action.
Step 3: Identifying Scenarios

Methodology used to develop and refine scenarios

The Task Force understood that any scenario developed and assessed would need to take into account the existing complexity of school district governance, organization and size in Berkshire County. Including the charter school and regional vocational technical school, current districts include:

<table>
<thead>
<tr>
<th>School District</th>
<th>Grades</th>
<th>Enrollment</th>
<th>District feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Adams-Cheshire Regional</td>
<td>PreK-12</td>
<td>1317</td>
<td></td>
</tr>
<tr>
<td>2. Berkshire Academy of Arts &amp; Technology</td>
<td>6-12</td>
<td>353</td>
<td>Charter School</td>
</tr>
<tr>
<td>3. Berkshire Hills Regional</td>
<td>PreK-12</td>
<td>1,286</td>
<td></td>
</tr>
<tr>
<td>4. Central Berkshire Regional</td>
<td>PreK-12</td>
<td>1,620</td>
<td></td>
</tr>
<tr>
<td>5. Clarksburg</td>
<td>K-8</td>
<td>173</td>
<td>Northern Berkshire SU 43</td>
</tr>
<tr>
<td>6. Farmington River Regional</td>
<td>PreK-12</td>
<td>114</td>
<td></td>
</tr>
<tr>
<td>7. Florida</td>
<td>PreK-8</td>
<td>81</td>
<td>Northern Berkshire SU 43</td>
</tr>
<tr>
<td>8. Hancock</td>
<td>PreK-6</td>
<td>36</td>
<td>Shaker Mountain SU 70</td>
</tr>
<tr>
<td>9. Lanesborough</td>
<td>PreK-6</td>
<td>206</td>
<td>Tri-District SU 71</td>
</tr>
<tr>
<td>10. Lee</td>
<td>PreK-12</td>
<td>685</td>
<td></td>
</tr>
<tr>
<td>11. Lenox</td>
<td>PreK-12</td>
<td>765</td>
<td></td>
</tr>
<tr>
<td>12. McCann Vocational Technical</td>
<td>9-12</td>
<td>484</td>
<td>Regional Technical</td>
</tr>
<tr>
<td>13. Mount Greylock Regional</td>
<td>7-12</td>
<td>562</td>
<td>Tri-District SU 71</td>
</tr>
<tr>
<td>14. North Adams</td>
<td>PreK-12</td>
<td>1,466</td>
<td></td>
</tr>
<tr>
<td>15. Pittsfield</td>
<td>PreK-12</td>
<td>5,487</td>
<td></td>
</tr>
<tr>
<td>16. Richmond</td>
<td>PreK-8</td>
<td>173</td>
<td>Shaker Mountain SU 70</td>
</tr>
<tr>
<td>17. Savoy</td>
<td>PreK-4</td>
<td>49</td>
<td>Northern Berkshire SU 43</td>
</tr>
<tr>
<td>18. Southern Berkshire Regional</td>
<td>PreK-12</td>
<td>725</td>
<td></td>
</tr>
<tr>
<td>19. Williamstown</td>
<td>PreK-6</td>
<td>450</td>
<td>Tri-District SU 71</td>
</tr>
</tbody>
</table>

Total: 16,032

The Task Force also recognized that school organization in the Berkshires is not static: during the course of the Phase Two study, school committees and residents in various Berkshire

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5 Berkshire Academy of Arts and Technology (BaaRT) is an independent charter school. Because it is independently chartered by the Commonwealth, the Task Force has not considered BaaRT in its scenario planning beyond recognizing that it draws students (and funds) from Berkshire County secondary schools that are already operating under capacity.
communities considered school closings and reconfigurations, changes in regional agreements, creation of regions and dissolution of regions. That said, the Task Force sought to examine implications of maintaining the 2017 status quo (Scenario #1) along with examining a range of other scenarios for achieving the educational and financial goals it had identified.

At the outset, based on Phase One findings, the Task Force considered “expanding shared services and shared staffing” as a stand-alone scenario. Members abandoned that thinking for two reasons. First, since every other scenario would require shared services and staffing, a discrete scenario calling for their expansion could be redundant. More critically, while districts are currently engaged in modest shared service efforts (and to a lesser degree shared staffing), all districts are discovering the serious limits that the current school district configurations in Berkshire County pose for expansion of shared services and staffing. In an attempt to address this challenge, several districts in northeast Berkshire County are looking to establish an educational collaborative focused on special education services. They recognize that in some other parts of the Commonwealth educational collaboratives have proven to be effective vehicles for expanding cross-district service and staff sharing. However, collaboratives have had a disappointing history in the Berkshires, and, except in the case of special education, are not robust vehicles for containing costs in areas of the budget that are major cost drivers. Without new ways of organizing districts, Task Force members concluded that there is little likelihood that shared services and staffing can be substantially expanded.

That insight led to the development of two new scenario options building from the experience some communities in the Berkshires and elsewhere have had with supervisory unions. In a supervisory union two or more school committees vote to share a superintendent and central office services. They establish a supervisory union school committee to do so, while maintaining local district school committees as well. In the two new scenario options (Scenario #2 and #3), regional and countywide “modified supervisory unions” are created aimed at streamlining the cumbersome governance and management requirements of conventional supervisory union agreements. The Task Force saw these options as offering a way to expand shared services and staffing beyond what is possible under the county’s current organization, short of establishing regional or countywide school districts (Scenarios #4 and $#5).

Overview of scenarios

Scenario #1: Make no change

In this scenario, Berkshire County’s districts continue to evolve with contiguous districts and those that discover common interests looking for more ways to share services and staff. For example, Williamstown, Lanesborough and Mt. Greylock continue to discuss the possibility of transitioning from a supervisory union (Tri-District) to a regional school district. North Adams, Northern Berkshires Supervisory Union and Adams-Cheshire Regional continue to collaborate

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6 See Appendix C, Shared Services in Berkshire County Public Schools, compiled in 2016 by the BCETF
to develop an educational collaborative to deliver special education services. Clarksburg continues to consider regionalizing with Stamford, Vermont. Other cities and towns explore on their own other options for enlarging or shrinking supervisory unions and/or regional districts.

**Scenario #2: Establish three (3) regional “modified supervisory unions”**

In this scenario, the school committees of the districts in each geographic region of the county (north, central, and south) vote to become a single regional “modified supervisory union”. A regional “supervisory union” (also called a “superintendancy union”) shares central office staff and services. Member districts retain their school committees and continue to be considered separate “local education agencies” by the Department of Elementary and Secondary Education. The costs of central office staff and services are divided among member districts.

**Scenario #3: Establish a single Berkshire County modified supervisory union**

In this scenario, the school committees of all Berkshire County districts vote to form a single, countywide “modified supervisory union” set up much as described in Scenario #2 but serving the entire county. Again, each existing school committee remains intact, and a regional school committee is also formed.

**Scenario #4: Establish three (3) regional school districts**

In this scenario, the school committees along with town meeting members, boards of selectman, and/or city councils of cities and towns in each region of the county vote to become a regional school district for a part of Berkshire County. A single regional school committee for each of the three regions is formed and existing district school committees end their service. All staff and services within the region are consolidated into that region’s school district.

Not all regional agreements must come in the same “flavor”. Some preserve more or less local control. Agreements can specify the conditions under which schools can be closed or consolidated, e.g., with consent of voters in all affected communities. They can give enhanced authority to school councils or give member towns authority and responsibility for their debt or for their individual school budgets.

**Scenario #5: Establish a single Berkshire County school district**

In this scenario, the school committees and voters of districts in Berkshire County vote to become a single countywide school district.\(^7\)

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\(^7\) The single district could take the form of a regional school district under current Massachusetts law and regulations, or, consideration could be given to adopting a county governance framework modeled after the structures used in states such as Delaware, Maryland or Florida.
Scenario Features

“Modified” Supervisory Unions

In a regional “supervisory union” (also called a “superintendancy union”) the school committees of two or more districts vote to form a supervisory union to share central office staff and services. A “supervisory union” school committee is formed and hires the superintendent. The supervisory union hires a business manager and other central office administrative and support staff. Member districts retain their school committees and all rights and responsibilities of a “local education agency” under law and regulation. The costs of central office staff and services are divided among member districts based on agreed-upon factors such as student enrollment, number of schools, or use of the service.

The attraction of supervisory unions is that school districts keep local control while being able to share the cost of a superintendent and other central office personnel and services with other districts. There are currently 16 supervisory unions in Massachusetts, three of which are in Berkshire County, all in the north:

- Northern Berkshire SU 43: Clarksburg, Florida and Savoy
- Shaker Mountain SU 70: Hancock, New Ashford and Richmond
- Tri District SU 71: Lanesborough, Williamstown and Mt Greylock Regional

In Tri-District, Lanesborough and Willamstown operate their own elementary schools and join together as a regional secondary school district, Mt. Greylock. On the other hand, both Northern Berkshire and Shaker Mountain are elementary only supervisory unions without an affiliation with a specific secondary school; students from these towns attend a number of different high schools.

Scenario #3 is most easily envisioned in Berkshire County Central where the school committees of two districts, Pittsfield and Central Berkshire Regional, could vote to form a supervisory union. It is more complex in other parts of the county.

- In Berkshire County South, for example, two K-12 districts, Lee and Lenox, would join one K-6 district, Richmond, and three K-12 regional districts (Berkshire Hills, Farmington River, and Southern Berkshire). Instead of having two entities each with its own school committee served by the supervisory union school committee as in Berkshire Central, Berkshire South would have six entities, each with its own school committee plus its supervisory union school committee.
- Berkshire County North would have 10 entities, each with its own school committee: one K-12 district, North Adams, and one regional K-12 district, Adams-Cheshire, would be joined by three existing supervisory unions (Northern Berkshire with three districts, Shaker Mountain with two, and Tri-District with three).
Because local school districts continue to operate under a supervisory union model, school choice is not affected under Scenario #2 or #3.

Supervisory unions are relatively easy to implement because they require only the vote of school committees. But ease of implementing a supervisory union is balanced by the challenge of operating one. School Committee chairs and superintendents who have led supervisory unions have identified challenges with the supervisory union structure, noting especially the complexity and duplication of effort involved in sharing staff among schools and managing separate budgets, financial reporting requirements, school committee policy and meetings, collective bargaining agreements, etc.

Given these challenges and the fact that current state regulation gives limited guidance and direction regarding supervisory unions, special legislation to pilot in the Berkshires a “modified” version of supervisory unions can make supervisory unions a more viable route to achieving at least some of the educational and financial goals being sought. Among the provisions that could reduce the governance and operational complexity of supervisory unions are these:

- Permitting the school committees of any city, town, regional school district or existing supervisory union to vote to form a “modified supervisory union”.
- Establishing at the outset the process for adding additional districts to the supervisory union in the future, as well as the process for a district to leave the supervisory union.
- Clarify that “shared central office” services can encompass a wide range of services in schools that require central office coordination, ranging from special education and related services to technology support and instructional coaching.
- Clarifying that the supervisory union can contract for those services with a wide range of third parties including higher education institutions, school districts, collaboratives, nonprofit agencies, etc.
- Identifying multiple options for determining the basis for cost sharing - including by district, enrollment, school, anticipated use, actual use - and establishing in advance a process for decision-making and conflict resolution; it should also be clear from the outset that the supervisory union can offer central services that not everyone chooses to use (or pay for).
- Identifying practical models for sharing staff among different schools in different districts.
- Permitting one entity to serve as fiscal agent for the supervisory union to simplify financial management.
- Committing to the eventual use of common platforms and software for financial, personnel and student information systems.
- Expecting school committees seeking to form supervisory unions to work with the Massachusetts Association of School Committees (MASC) to adopt a statement of purpose and ground rules that will serve to commit them to pursuing practices that will reduce governance and operational complexity, e.g.,
To avoid redundancy in budget development and financial reporting, use a common budget development and financial reporting software tools and format and, where feasible, timetables.

To build knowledge and relationships among committee members and school staff from all of the districts in the supervisory union (and to reduce redundancy and meeting overload for central office staff):

- Adopt a common meeting agenda template and format;
- Set a desired maximum in frequency and length of school committee meetings; and,
- Adopt a common annual meeting calendar and hold regular meetings in shared locations on common dates to reduce central office overload.

There are at least two options for developing the details of special legislation. The first is to assemble a small task force of school committee members, superintendents, business managers and special educators who have had experience with supervisory unions to work with staff from the MASC and/or the Massachusetts Association of Regional Schools (MARS) to craft the proposed language. A second is to invite committee members and administrators from two or more districts interested in exploring the formation of a supervisory union to participate in the drafting process. These two options are not mutually exclusive, though attention to the state legislature’s timetable for consideration is imperative. Special legislation to permit the Berkshires to pilot a more efficient model of supervisory union should be attractive to the Governor and state legislators as a no-cost way to test an innovative solution to declining enrollment and rising costs, a challenge facing other areas in the Commonwealth, not only Berkshire County.

Regional Boundaries

Task Force members concluded that regional boundaries within Berkshire County are somewhat fluid, pointing to towns like Hancock where geography naturally divides it between north and central/south and Richmond that sends students to districts in both north and central.

That said, Task Force members concluded that agreed-upon boundaries were needed for modeling regional scenarios and that these two assumptions should be used to identify them:

- Any single region should enroll not fewer than 3,500 students, the general threshold for sufficient size to balance offerings and cost; and,
- Boundaries should take into account – wherever feasible – existing district relationships.

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8 In Vermont, for example, many supervisory unions employ a “carousel” process through which district school committees meet before (or after) meetings of the supervisory union committee; meeting locations are typically rotated among member district schools.
9 See Region Boundary Map in Appendix D
Nothing in this report should suggest that these are the only or best groupings, just a logical start for the purpose of modeling alternatives. Different configurations may ultimately be more appealing or practical.

**Sample Boundaries by City and Town:**

**Berkshire County North:** Adams, Cheshire, Clarksburg, Florida, Lanesborough, New Ashford, North Adams, Savoy, Williamstown (plus Monroe & Rowe in Franklin County)

**Berkshire County Central:** Becket, Dalton, Hancock, Hinsdale, Peru, Pittsfield, Washington, Windsor (plus Cummington in Hampshire County)

**Berkshire County South:** Alford, Egremont, Great Barrington, Lee, Lenox, Monterey, Mount Washington, New Marlborough, Otis, Richmond, Sandisfield, Sheffield, Stockbridge, Tyringham, West Stockbridge

**Sample Boundaries by Current District:**

**Berkshire County North:**
- Ten Districts: Adams- Cheshire Regional, Northern Berkshire SU 43 (Clarksburg, Florida, Monroe, Savoy), Shaker Mountain SU 70 (Hancock, New Ashford\(^\text{10}\)), North Adams, Tri-District SU 71 (Lanesborough, Williamstown, Mt. Greylock)
- Five Entities: one K-12 District, one regional district, three supervisory unions
- Enrollment based on October 1, 2016 data: 3,748

**Berkshire County Central:**
- Two Districts: Pittsfield & Central Berkshire Regional
- Two Entities: one K-12 district and one regional K-12 district
- Enrollment based on October 1, 2016 data: 7,107

**Berkshire County South:**
- Six Districts: Berkshire Hills Regional, Farmington River Regional, Lee, Lenox, Richmond,\(^\text{11}\) Southern Berkshire Regional
- Six Entities: two K-12 districts, one K-6 district, three regional districts
- Enrollment based on October 1, 2016 data: 4,410

\(^\text{10}\) Hancock, Richmond & New Ashford are now joined in Shaker Mountain Supervisory Union #70. New Ashford does not operate its own school. In this regional plan, Hancock and New Ashford are in Berkshire County North and Richmond is in Berkshire County South.

\(^\text{11}\) See footnote 7.
McCann Vocational Technical High School

McCann Vocational Technical High School (Northern Berkshire Regional), located in North Adams, currently serves nine member towns in northern Berkshire County and enrolls students from nine other towns. McCann could become the vocational technical school within a Berkshire County North regional school district. Similarly, Taconic Vocational Technical High School in Pittsfield could become the regional vocational technical school for Berkshire County Central. One of these two vocational technical schools – or possibly Berkshire Community College – could contract with Berkshire County South to help launch or operate vocational technical programs at one of the schools in the southern part of the county where students currently have no access to vocational technical offerings.

That said, McCann is not included in modeling the scenarios. Given its specialization and different funding arrangements under state law, as well as the complexity of dissolving its existing regional agreement and establishing a new one, DMG concluded that its inclusion might distort the analysis of the scenarios.

School Choice

More than one in ten students in Berkshire County participates in the Commonwealth’s School Choice program. Under Scenarios #2 and #3, no change in existing school choice options are assumed: supervisory unions retain existing district boundaries. Under Scenarios #4 and #5, maintaining existing school choice options is also assumed: regional school committee policies can permit students to attend schools within the regional district; they can also accept students from districts outside the regional district under school choice.\textsuperscript{12}

\textsuperscript{12} See page 18 for more on school choice and transportation
Financial Modeling

Base line: Savings from Financial Economies of Scale

For each scenario, estimated savings are projected across thirteen (13) areas of operational services where members of the Task Force or other observers predicted potential savings from some kind of consolidation:

1. Central Office: Superintendent and Assistants
2. Central Office: Non-Academic
3. Central Office: Academic
4. Transportation
5. School Choice
6. Food Services
7. Substitute Teachers and other Staff
8. Legal
9. Custodial
10. Maintenance
11. Student Support Services, e.g., nursing, guidance
12. General Education Staffing
13. Special Education

When modeling the impact of these 13 factors across the five scenarios, no change is assumed in cohort and class size. That is, school configurations are assumed to be the same as they are now. For example, it is assumed that no district reconfigures two K-6 schools to increase grade cohort size by making one a primary school serving PreK-2 and the other an intermediate school serving grades 3-6. Nor is it assumed that additional schools are closed and students moved to another school to increase class size and therefore reduce the number of classroom educators required.

Additional Financial Modeling Component #1: Managing Cohort and Class Size

For the 2016-17 school year, average class size in the Berkshires was 16.3, 15% below the state average of 19.1 students per class. As noted in the Phase One report, these smaller than average class sizes are primarily a result of shrinking enrollment over the last 15 years. This additional component of the model considers the financial impact of matching the state average class size through such strategies as:

- Sharing staff across schools;
- Not replacing retiring and departing staff when positions can be consolidated or shared or when other staff can be reassigned; and,
- Increasing cohort size through school grade level reconfiguration, and, possibly, school closing.
Additional Financial Modeling Component #2: Managing Future Declining Enrollment

Enrollment is projected to decrease by 11% between 2015 and 2025. This second additional financial modeling component identifies the financial impact of reducing those positions most closely tied to enrollment by 10% using strategies such as those identified above.

A note on Cohort and School Size

DMG and the Task Force recognize that there are limits to economies of scale: just as there are cohort sizes below which educational quality and cost are unsustainable, there are cohort sizes above which ownership and engagement are also likely to be affected. While a number of Berkshire County elementary and secondary schools fall below the sustainability “floor”, none appear to be approaching the “ownership” ceiling. While many factors besides size contribute to ownership and engagement, research and most observers would agree that high schools with roughly 900 students, middle schools with fewer than 600, and elementary schools with fewer than 450 students can afford ample opportunity for ownership and engagement.

School choice

Berkshire County families participate in the state’s school choice program at a rate 5.6 times higher than the state average. More than 10% of Berkshire County students participate in choice. Some districts bring in many more students (and the $5,000 that accompanies each) than they lose to other districts. Other districts lose many more than they bring in. That said, nearly every district is affected.13

Because the use of school choice is so widespread in Berkshire County, the scenarios are modeled with the assumption that school choice is not going away. All five models assume no reduction or change in school choice opportunities. Under school choice, neither the sending or receiving district is responsible for transporting students. As a result, because district boundaries do not change under Scenarios #1, #2 and #3, maintaining school choice has no overall financial impact. In Scenarios #4 and #5, where district boundaries expand, the financial impact of maintaining student choice does increase transportation costs because many former choice students who were not eligible for transportation before would now become eligible. However, regional districts become eligible for state regional transportation aid for every student transported who lives more than 1 ½ miles from the school they attend. In 2017, the reimbursement rate is 73%, well above the likely net increase in the overall local transportation budget for transport choice students. As a result, total transportation costs drop in scenarios #4 and #5, even though choice students would receive transportation.

13 See School Choice Analysis, Appendix E
**In-district tuition rates**

Individual school committees establish the tuition rate the district will charge for students enrolling from other districts who are not attending their schools under the school choice program for which the charge to the sending district is set by the state at $5,000. For a variety of reasons including tradition, the availability of choice, market share and competition, rates vary widely from district to district. They rarely equal the per pupil cost of educating students in the school. The variation can distort local finances and decisions. It is beyond the scope of this study to model in-district tuition options, but it will be important for the supervisory union school committee(s) under Scenarios #2 and #3 and the regional school committee(s) under Scenarios #4 and #5 to grapple seriously with this issue.
Step 4: Modeling the Scenarios

Framework Used to Model Scenarios

Drawing on the lessons learned from regionalization efforts in the Berkshires and other regions and states, Task Force members decided to apply an “ease-impact” framework to assess scenarios, weighing how likely a scenario is to achieve the educational and financial goals (“impact”) against the likely challenges of implementing that scenario (“ease”).

![Diagram]

Most desirable = “high impact/easy to do” quadrant (top right)
Least desirable = “low impact/hard to do” quadrant (bottom left)
Applying the “Ease-Impact” Framework to Assess Scenarios

Translating Goals into “Impact” Criteria

The Task Force refined the initial translation of educational and financial goals into more discrete criteria to assess impact.

- The final model has eleven (11) factors related to Educational Goal #1 ranging from “more shared staff for electives and career pathways to increase breadth of offerings” (1e) to “increased cohort size to expand offerings” (1i) to “more equitable access to offerings” (1k)
- The model has nine factors related to Educational Goal #2 ranging from “more specialized and focused student support services leadership” (2a) to “aligned school schedules” (2c) to “easier access to partnerships with third parties” (2d)
- The model has five factors related to Financial Goal #3 ranging from “managing operational costs” (3b) to “managing cohort and class size” (3c) and “managing future enrollment decline” (3d) to “bang for the buck” (3e)
- In addition, as noted earlier, the model projects a range of potential savings and costs for each scenario, including:
  - Spending on central office administration, transportation and other areas
  - Savings from achieving the state average for class size (Additional Financial Modeling Component #1)
  - Savings from responding to future enrollment decline with roughly proportional staffing reductions (Additional Financial Modeling Component #2)

A range of savings is projected for each area: the high end is based on either a state or regional average or a practice other similar districts have actually implemented; the low end is 20% below the high end in recognition of the fact that “life is messy” and exceptions are often required. The financial impacts calculated are reasonable estimates based on reasoned criteria. That said, smart, thoughtful people could make other assumptions. The modeling assumptions are provided in Appendix G.

Projections for personnel savings are based on the mid-point of existing collective bargaining contracts, rather than the top. Some regionalization efforts have failed to achieve projected savings in part because the new contracts incorporated the most costly provisions from each of the contracts being merged.

Translating “Lessons Learned” about regionalization into “Ease” criteria

The Task Force refined the initial translation of “lessons learned” about regionalization into ease criteria by incorporating challenges involved in initial implementation as well as on-going operation.
The four implementation challenges the model assesses range from “maintaining school choice” (4b) to “dealing with contractual, legal and regulatory requirements for implementation” (4d). The five challenges involved in on-going operation of the scenario that the model assesses range from “maintaining local control over budget, curriculum and policy” (5a) to “sustaining local ownership and engagement” (5c) to “managing stakeholder entities to operate” (5d).

**Apply a “Green, Yellow and Red” rating scale**

In consultation with the Task Force, DMG rated each of the 34 specific criteria on a scale of red, yellow and green. Green represents the most positive impact on educational and financial goals and the greatest ease of implementation and/or operation.

Within the color designation, differences of degree are captured by different written descriptors.

**An illustration**

For example, criteria 1a is “more specialized and focused academic leadership: more specialized leadership expertise and ability to focus a meaningful portion of one’s work time on that specialization, e.g., reading, Title I and Grants”. Scenario #1 offers little or no opportunity to achieve this criterion except in the largest districts where there is sufficient economy of scale to make specialization more practical. Therefore, Scenario #1 is labeled “little” and given the color red.

Under Scenario #2 where central office staffing is shared across three modified supervisory unions with 3,500 to 7,000 students each, shared central office positions that specialize in high priority areas like literacy and grants management are possible. As a result, the rating shifts to “yellow”. Yet there is a difference in economy of scale between 3 regional supervisory unions and a single district of 15,000. In the latter, more focused specialization is possible, so Scenario #3 remains yellow, but its written descriptor changes to “moderate”.

The color changes to green for Scenario #4, the three-region school district model because a regional school district has little of the operational complexity of the modified supervisory union. Without separate budgets, contracts, financial and state reporting for each district in the supervisory union - and the other operational challenges involved in a supervisory union - central office staff members have more time and opportunity to specialize and focus their time. And, once again, as is the case for regional versus countywide supervisory unions, the countywide scenario gives greater opportunity for the economy of scale needed to afford more specialized staff and services. Therefore, the written descriptors for Scenarios #4 and #5 reflect that difference despite both being green: Scenario #4 is “a lot” while Scenario #5 is “maximum”.

Similar differences between the regional and countywide versions of modified supervisory unions and regional school districts and a single countywide district are evident whenever economy of scale is a significant factor. For example, criteria 1j focuses on technology: “more
student and educator access to effective tools and distance learning through a shared technology platform and support.” A number of stakeholders believe that expanding on-line and distance learning opportunities is a key to addressing the challenges of small cohort size in the Berkshires where most high schools, in particular, are very small: six of the ten high schools enrolled fewer than 90 entering ninth grade students this past school year. Rich, compatible technology infrastructure and shared expertise will be critical, yet disparities in access and differences in infrastructure and tools are the norm in Berkshire County. The problem begs for a countywide solution where the scale made possible by a 15,000-student district can ensure adequate support.

**Notes on the modeling documents**

The modeling document has two components:

- The first is a color-coded document capturing assessments of each scenario against the 34 criteria related to 1) educational impact, 2) financial impact, and 3) ease of implementation and operation. This first component appears in four parts in the text of the report and as a single document in Appendix F.

- The second component is a summary of the ranges of projected financial savings for each scenario. It appears in the text of the report on p. 29. Appendix G supplements the summary with notes that explain specific assumptions made deriving the estimated ranges.

This report seeks to make the criteria and data used in the model transparent and accessible to invite dialogue and refinement. To that end, all of the budget, staffing and other source data for the detailed financial modeling are available as a spreadsheet. Also, the assumptions made in the modeling are detailed in Appendix G. Reasonable people will have questions. They will want to test other assumptions. They will want to use other facts. With that kind of probing, the chances of discovering and acting upon a broadly accepted solution to the challenges facing education and economic development in the Berkshires grow.

The modeling of each of the five scenarios has been done in this study at the global level rather than by district or town. We have done so for several reasons. Implementing any of these scenarios is likely to begin with a subset of districts interested in seriously exploring one or more of these options as they apply to their own specific contexts. The impacts on districts will vary depending on which districts are involved. Therefore, any analysis done now using these boundaries and based on current financial, personnel and other data, will be both out of date and not relevant to the districts actually engaged in study. Doing their own study of “ease and impact” using the framework and dimensions identified here - and others of special importance in their contexts - will likely lead to greater confidence, credibility and action. Interested districts will likely want and need support to undertake such study.

---

14 Not including BaaRT and McCann: Drury (86), Hoosac Valley (63), Mt Greylock (89), Lee (64), Lenox (68), Mt Everett (55) Source: DESE
## Step #5: Assessing Impact

### Educational Impact

<table>
<thead>
<tr>
<th>GOAL #1: All students will have improved and more equitable access to high quality career pathways, enrichment and elective courses, and co-curricular activities.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>DIMENSION</strong></td>
</tr>
<tr>
<td>17 Districts (Status Quo)</td>
</tr>
<tr>
<td>1a</td>
</tr>
<tr>
<td>1b</td>
</tr>
<tr>
<td>1c</td>
</tr>
<tr>
<td>1d</td>
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<tr>
<td>1e</td>
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<tr>
<td>1f</td>
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<td>1g</td>
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<tr>
<td>1h</td>
</tr>
<tr>
<td>1i</td>
</tr>
<tr>
<td>1j</td>
</tr>
<tr>
<td>1k</td>
</tr>
</tbody>
</table>
Goal #1 calls for improved and more equitable access to high quality offerings.

How well a scenario is likely to achieve this goal is related to the specialization and focus possible when district size grows. Generally, the smaller the district the more “hats” individual staff members must wear, and the larger the district – within limits – the more individual staff members are likely to be able to specialize and bring more focus and expertise to certain tasks.

For example, a district of 1,000 students is unlikely to be able to afford a specialist in mathematics or reading. Its curriculum director, if it has one, has to bring expertise in those areas and many others. The assumption made in this model is that high quality offerings require that educators have access to knowledgeable leaders (1a) who can focus their time on leading efforts to align curriculum and make sure it is rigorous (1b), supervise and support educators and support principals to do the same (1g), and help principals align schedules (1e), identify opportunities to share staff (1e) and resources (1f), and spend the time needed to develop effective partnerships with third parties (1d) and develop and support the effective use of technology (1j).

Similarly, the smaller the district the more likely a teacher is to be the only one teaching a particular subject, grade or type of student. The opportunity to collaborate with a colleague on lesson design and curriculum planning contributes to high quality offerings (1h).

Equitable access to offerings (1k) depends on sharing resources across communities so that an individual community’s capacity to provide high quality offerings to students is not the only determiner of whether s/he can access high quality offerings.

In general, scenarios #4 and #5 (fully regionalized districts) do better than #3 and #4 (modified supervisory union) in achieving these goals because of the ability of the former to make decisions that the latter keep at the local school level. And for some dimensions, the single district solutions (#3 and #5) are more effective than the regional solutions (#2 and #4) primarily because of the economies of scale possible in a 15,000-student entity as opposed to an entity as small as 3,600.
<table>
<thead>
<tr>
<th>DIMENSION</th>
<th>EDUCACTIONAL IMPACTS</th>
</tr>
</thead>
<tbody>
<tr>
<td>GOAL #2:</td>
<td>All students will have enhanced safety nets to support their academic and life success, e.g., guidance counseling, reading services, curriculum for social-emotional learning, special education services.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCENARIOS</th>
<th>#1</th>
<th>#2</th>
<th>#3</th>
<th>#4</th>
<th>#5</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 Districts (Status Quo)</td>
<td>Little</td>
<td>Some</td>
<td>Moderate</td>
<td>A lot</td>
<td>Maximum</td>
</tr>
<tr>
<td>Three Regional Modified Supervisory Unions</td>
<td>Little</td>
<td>Little</td>
<td>Little</td>
<td>Some</td>
<td>A lot</td>
</tr>
<tr>
<td>One Countywide Modified Supervisory Union</td>
<td>Little</td>
<td>Little</td>
<td>Little</td>
<td>Some</td>
<td>A lot</td>
</tr>
<tr>
<td>Three Regional Districts</td>
<td>Little</td>
<td>Some</td>
<td>Moderate</td>
<td>A lot</td>
<td>Maximum</td>
</tr>
<tr>
<td>One Countywide District</td>
<td>Little</td>
<td>Little</td>
<td>Little</td>
<td>A lot</td>
<td>A lot</td>
</tr>
</tbody>
</table>

2a More specialized and focused student support services leadership: more specialized leadership expertise and ability to focus a meaningful portion of one's work time on that specialization, e.g., out-of-district special education programming, early childhood, social-emotional learning

2b Aligned curriculum across districts: curriculum is aligned vertically, horizontally and to state standards to facilitate within-district student transitions and cross-district school choice

2c Aligned school schedules: to support shared staffing

2d Easier access to partnerships with third parties, e.g., colleges & universities, community health agencies, collaboratives

2e Shared highly specialized staff to provide more effective student supports, e.g., ESL teacher, behavior interventionist, autism specialist

2f More supervision, professional development and coaching for support staff that is also more cost-effective

2g Increased job-alike collaboration for support staff & specialists

2h Increased cohort size to increase size of intervention and remediation groups with similar needs

2i More equitable access to safety net and supports
Goal #2 calls for improved “safety nets” to support their success such as guidance counseling reading services and curriculum for social-emotional learning.

The nine dimensions identified to assess how likely a scenario is to achieve Goal #2 parallel the thinking behind the eleven dimensions for Goal #1. Ratings are similar, too, with the exception of 2b (aligned curriculum) and 2c (aligned schedules), where Scenario #4 is seen as less likely than scenario #5 to achieve these goals. The degree of curriculum and schedule alignment required to make a difference for course offerings (Goal #1) is considerably less detailed than the alignment required to make a difference for grouping struggling students and scheduling specialists. It is likely that only a larger, single district will have the capacity to achieve that level of alignment.
## Financial Impact: Impact on Spending for Selected Areas

<table>
<thead>
<tr>
<th>DIMENSION</th>
<th>SCENARIOS</th>
<th># 1</th>
<th># 2</th>
<th># 3</th>
<th># 4</th>
<th># 5</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>17 Districts (Status Quo)</td>
<td>Three Regional Modified Supervisory Unions</td>
<td>One Countywide Modified Supervisory Union</td>
<td>Three Regional Districts</td>
<td>One County-wide District</td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>More specialized, focused and efficient operations leadership e.g., human resources, transportation; finance</td>
<td>Little</td>
<td>Some</td>
<td>Moderate</td>
<td>A lot</td>
<td>Maximum</td>
</tr>
<tr>
<td>3b</td>
<td>Managing operational costs</td>
<td>None</td>
<td>Some</td>
<td>Some</td>
<td>A lot</td>
<td>A lot</td>
</tr>
<tr>
<td>3c</td>
<td>Managing cohort and class size</td>
<td>Little</td>
<td>Little</td>
<td>Little</td>
<td>A lot</td>
<td>A lot</td>
</tr>
<tr>
<td>3d</td>
<td>Managing future enrollment decline</td>
<td>None</td>
<td>Little</td>
<td>Little</td>
<td>A lot</td>
<td>A lot</td>
</tr>
<tr>
<td>3e</td>
<td>“Bang for the Buck” (chances for improved quality of operational services)</td>
<td>Little</td>
<td>Moderate</td>
<td>Moderate</td>
<td>A lot</td>
<td>Maximum</td>
</tr>
</tbody>
</table>

The range of savings each scenario can be predicted to yield is outlined in the financial modeling table on the next page.
Central Office Staffing

The financial modeling revealed that Berkshire County has lots of central office staff and they are spread too thinly. Nothing in this report should suggest that the districts have too many central office staff, given the current configuration. Staff members in each district wear many hats and have very demanding jobs. Scenarios #2–5 are seeking the benefits of specialization at lower cost. They all achieve that to some degree, but Scenarios #4 and #5 do a much better job of also achieving the simplicity that is desirable if the schools are to gain the full benefits of central office staff expertise.
Transportation
Overall, Berkshire County spends a lot on transportation, transporting 2 of every 3 students. Under the modified supervisory union, efficiencies should yield 5% to 10% in savings by more integrated routes and each bus being closer to capacity. Under the regional district scenarios, transportation savings are more substantial. The top of the savings range assumes the same state reimbursement for regional transportation as now, while the bottom assumes a 20% cut in state reimbursement. Savings here is a net figure: savings from efficiencies plus savings from new reimbursement minus the cost of the increased number of students newly transported. Newly transported students include students enrolled through choice since most attend schools within the newly drawn regions.

Transportation started in many people’s minds as a deterrent to regionalization, but the modeling reveals it can be a positive driver of savings.

Food Services
Consolidation of Food Services yields only modest savings because most Food Services costs are school-based.

Legal
Berkshire County schools spend very little on legal services related to collective bargaining, so while there are no savings to be had through consolidation, more legal expertise would be brought to the table, literally.

Special Education
Only modest savings are projected from being able to build out-of-district program options to save on tuition and transportation.

Managing Cohort and Class Size
Savings here come from reducing teaching and other personnel tied to declining enrollment. It is estimated to save up to 6% of current spending. Managing cohort and class size typically requires strategic management of staff attrition. When teachers and other staff retire or depart, the vacancy is taken as an opportunity to consider not filling the position, making it a shared or part-time position, repurposing it to meet a different need, or reassigning other staff to fill it. In this way, managing class size and enrollment decline can be done with few, if any, lay-offs of staff.

The regional districts envisioned in Scenarios #4 and #5 are better equipped than the “modified supervisory unions” to achieve these savings – as well as those projected for “managing enrollment decline” because staffing decisions are made at the level of a single school committee and consolidated central office to which the principals are responsible. There is a single collective bargaining agreement.
Managing Future Enrollment Decline

Managing future enrollment decline will be essential for a sustainable future for Berkshire County schools: as enrollment drops, the state and federal funding based enrollment will drop; without active management of cohort and class size moving forward, per pupil costs can rise beyond local taxpayers’ ability to pay them. Even more dramatic cuts in services will likely follow. Managing future enrollment decline is estimated to save up to 4.8% of current spending.

The modeling makes clear that there are four financial “levers” that account for most of the potential savings. In order of magnitude of savings, they are:

- Managing cohort and class size to roughly match the state average, which requires, on average, adding about 2 students per class ($12,000,000 - $15,000,000)
- Managing future declining enrollment by reducing those positions most closely correlated with enrollment at a rate comparable to projected enrollment decline ($9,300,000 - $12,000,000)
- Achieving economies of scale in central office staff and services, not including transportation (up to $5,200,000)
- Securing reimbursement for transportation costs under new regional agreements (up to $3,300,000)

Overall Berkshire County school district spending is roughly $250,000,000; therefore, saving $8,500,000 in central office and transportation costs due to economies of scale represents about 3.5% of total spending. Savings from managing cohort and class size or managing future declining enrollment represent proportionately greater savings: taken together, on-going savings from managing cohort/class size and future enrollment decline could total an additional $21,300,000 to $27,000,000 annually for Scenarios #4 and #5. Total savings in all three areas – central office (including transportation), managing class and cohort size, and managing future enrollment decline - can be projected to represent between 11% and 14% of current spending.
Implementation and Operational Ease

Dimensions of ease of implementation and operation are assessed separately to reflect that they can be inversely related: scenarios that are most challenging to implement (#4 and #5) are, in a number of ways, the easiest to operate.

Managing debt (4a) and maintaining school choice (4b) are straightforward and relatively easy to determine in modified supervisory unions where the “status quo” prevails. They are only moderately difficult for regions (scenarios #4 and #5) because they can be negotiated among the parties at the outset. On the other hand, negotiating with stakeholders to establish the entity (4c) is considerably more difficult for regional districts and a county-wide district: whereas school committees alone can decide to establish a supervisory union, forming a regional district requires the assent of many more parties. Addressing contractual, legal and regulatory requirements at the outset (4d) when establish regional districts or a single county-wide district is considerably more complex than it would be to establish supervisory unions.
The challenges of operation differ from those of implementation in some significant ways. Little effort will be required to maintain local control and ownership (5a, 5b and 5c) under scenarios #1, #2 and #3 because none of these necessarily change the fundamental role of the existing school committees. Local control of school closing and configuration (5b) and local ownership and engagement (5c) are only moderately difficult to implement under the regionalization scenarios (scenarios #4 and #5) because regionalization agreements give existing districts the opportunity to establish criteria and limits on what can happen to local schools.

On the other hand, the number of stakeholder entities involved in governance, management and finance (5d) affect how challenging it is to actually operate the entity envisioned in each scenario. On this dimension, the single modified supervisory union earns the worst score because of the many separate entities with a role in governance and financial decision-making. Scenarios #1 and #5 earn the best scores on this dimension, the former because the decision-making entities do not change and the latter because a single school committee can bring a unified message to each city and town. Similarly, the requirements of operation (5e) become relatively easy for regional districts or a countywide district, unlike the situation for modified supervisory unions, where the complexity of day-to-day operation is significant, even with the improvements that can be anticipated through special legislation to modify supervisory unions.
It should be noted, too, that implementing the status quo (Scenario #1) will be increasingly challenging for more and more districts: the budget limitations, declining enrollment and limited resources many districts face can be expected to intensify.
Overall Observations:

When the three components of the model are taken together, the colors, numbers and words reveal a clear picture: moving from Scenario #1 to Scenario #5 yields more and more of the benefits the Task Force seeks, yet getting there is harder and harder. On the “Ease/Impact” Decision Framework the scenarios might be displayed this way:

A note on Scenario #1

This modeling likely obscures the negative impact on education that maintaining the status quo is likely to have. As enrollment continues to shrink and financial resources tighten even more without any of the economies of scale achieved through the other scenarios, there can be little question that the quality of education in Berkshire County will deteriorate. For example, cohort size in a number of Berkshire County high schools is likely to become unsustainable. Berkshire County South, for example, faces a double-digit drop in enrollment between now and 2025. Its four high schools are already tiny with freshman classes at three of the schools below 70: Lee (64), Lenox (68) and Southern Berkshire (55). Many see roughly 125 students as a minimum grade level cohort size needed to sustain an adequate range and quality of offerings. Only Monument Mountain, with 121 ninth grade students this year, approaches that minimum. And that is before the enrollment decline projected for the next decade. Berkshire County North faces a similar predicament with 238 entering ninth grade students in three high schools this past year. With McCann unlikely to see its enrollment dip because of the specialized vocational training it offers, Drury and Hoosac Valley are likely to see their freshman classes drop below 60. And Mt. Greylock will fall further below the sustainable size of approximately 125.
A note on implementation

To ease challenges involved in implementation, scenarios #2, #3, #4 and #5 can be implemented in stages. That is, they can be phased-in, beginning with the most interested districts. The scenarios need not be seen as mutually exclusive either. That is, Berkshire County Central might want to pursue becoming a single regional school district from the outset, while the districts in Berkshire County North pursue a regional supervisory union. No single district is forced to join the effort; at the same time, no single district can block the efforts of others. The result may be quick progress in some places and lessons learned from the “early adopters” that can be applied by others.
Looking Ahead to Phase 3

Guided by its deliberations and the findings in this report, the Task Force will make a recommendation and identify next steps. The next steps will include, at a minimum:

- Outreach to legislators, school committees and boards of selectman in September to explain the scenarios identified, the modeling completed, the Task Force recommendation(s), and opportunities for continued input and engagement.
- Identification of next steps for the Task Force and others.
- Support for the “willing”, i.e., those districts and municipalities most interested in exploring ways to move forward.
Appendices
We believe that a high quality education is the right of every child in Berkshire County. We are exploring and seeking options that will provide the best opportunities and outcomes from and for our schools and school districts at a time of declining population and resources.

The Berkshire County Education Task Force is launching Phase II of its effort to maintain or enhance the quality of PreK-12 education in a period of declining population and resources as school districts in Berkshire County face educational and financial crisis.

We begin Phase II seeking to understand more fully the aspirations that families, educators, students, and community members have for K-12 education in Berkshire County. This is a critical moment in this study, as the results will inform the exploration of options.

Over the next six months, community conversations will lead to a careful review of aspirations and options to achieve them. We will be studying other relevant communities, locally and nationally, to understand the decisions they have made facing circumstances similar to ours, and the outcomes they achieved. This research, combined with community-defined goals and aspirations and the initial efforts by the Berkshire County Education Task Force, will inform our discussions and our recommendations.

The intent of the Berkshire County Education Task Force is to develop and recommend solutions that:

- Enhance access, diversity, breadth and quality of educational programs for children countywide so they are fully prepared for college, career and a life here in the Berkshires;
- Create economies of scale (financial savings) through new collaborations, technologies, partnerships, and regional agreements between and among towns/cities and districts;
- Advance new investments in collaborative solutions (e.g. expanded pre-K programming or special education services) that enhance educational services and opportunities for children countywide;
- Maintain and honor the unique identity of each Berkshire community, ensuring citizens remain fully connected and engaged with their schools; and
- Are sensitive to age appropriate social and learning practices, in matters such as transportation/travel time and the number of school/grade transitions.

In March you’ll be hearing from us about opportunities to come together in regional sharing sessions so that we can learn more about your hopes for enhancing quality education for every child in Berkshire County. We hope you will engage with us as we move forward.
### B. Summary of Community Feedback from Aspirations Outreach Meetings

#### I. The feedback summary comes from the following community meetings held as well as the online survey open to the public:

<table>
<thead>
<tr>
<th>Date &amp; Time</th>
<th>Meeting/Location</th>
<th># Of attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, April 10, 5:00 P.M.</td>
<td>Educator's Union Presidents' Meeting, Crowne Plaza</td>
<td>16</td>
</tr>
<tr>
<td>Tuesday, April 11, 6:00 P.M.</td>
<td>MCLA Church Street Center, North Adams</td>
<td>36</td>
</tr>
<tr>
<td>Monday, April 24, 7:00 P.M.</td>
<td>Berkshire South Regional Community Center, Great Barrington</td>
<td>36</td>
</tr>
<tr>
<td>Tuesday, April 25, 6:00 P.M.</td>
<td>Wahconah Country Club, Dalton</td>
<td>38</td>
</tr>
<tr>
<td>Tuesday, April 25, 12:15 P.M.</td>
<td>Berkshire Community College, Pittsfield</td>
<td>25</td>
</tr>
<tr>
<td>Tuesday, April 25, 6:00 P.M.</td>
<td>Berkshire Community College, Pittsfield</td>
<td>19</td>
</tr>
<tr>
<td>Wednesday, April 26</td>
<td>Berkshire Community College, Education Leadership Program</td>
<td>27</td>
</tr>
<tr>
<td>Virtual</td>
<td>Online Survey Respondents</td>
<td>45</td>
</tr>
</tbody>
</table>

#### Month of April

Student Focus Groups at:
- Drury High School
- Hoosac Valley Regional High School
- Lenox Memorial Middle & High School
- Mount Everett High School
- Mount Greylock Regional School
- Pittsfield High School
- Taconic High School

Total # of Community Participants ~455
II. The top priority areas that emerged from community meeting, online survey and student focus groups includes the following:

<table>
<thead>
<tr>
<th>#</th>
<th>Priority Areas</th>
<th>Number of Mentions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ensure <strong>access to high quality/rigorous education</strong> for all (including course rigor and availability and teacher expertise)</td>
<td>96</td>
</tr>
<tr>
<td>2</td>
<td>Increase <strong>arts, electives, AP, extracurricular</strong> offerings (including foreign languages)</td>
<td>13</td>
</tr>
<tr>
<td>3</td>
<td>Provide better access to more <strong>career pathways (vocational programs/technical skills)</strong> – HS</td>
<td>18</td>
</tr>
<tr>
<td>4</td>
<td>Build strong support services (<strong>special education, ELL and social-emotional</strong>)</td>
<td>45</td>
</tr>
<tr>
<td>5</td>
<td>Increase <strong>collaboration (and/or consolidate some services)</strong> between districts within Berkshire County system</td>
<td>19</td>
</tr>
<tr>
<td>6</td>
<td>Value, support, and compensate all <strong>educators</strong></td>
<td>119</td>
</tr>
<tr>
<td>7</td>
<td>Collaborate as a community to improve <strong>family outreach programs</strong> (i.e. libraries, food security programs, parent education etc.)</td>
<td>80</td>
</tr>
<tr>
<td>8</td>
<td>Increase <strong>individualized</strong> attention and cultivating <strong>student autonomy</strong></td>
<td>27</td>
</tr>
<tr>
<td>9</td>
<td>Maintain and promote a strong sense of pride and ownership for the <strong>community</strong></td>
<td>50</td>
</tr>
<tr>
<td>10</td>
<td>Increase access to <strong>technology</strong> that is integrated with learning to prepare kids for 21st century and beyond</td>
<td>65</td>
</tr>
<tr>
<td></td>
<td><strong>Total Number of Mentions for Top 10 Priority Areas</strong></td>
<td><strong>676</strong></td>
</tr>
</tbody>
</table>
C. A Compilation of Shared Services in Berkshire County (2016)

1. TRANSPORTATION

- **Special Education Transportation** – Districts share the cost of out of district transportation when they have students placed within the same, or nearby, programs out of district.
- **Field Trip Transportation** – Districts share the cost of field trips when two or more districts and buses are shared.
- **Vocational Transportation** – Lee, Lenox, and Richmond sharing transportation to Taconic and Pittsfield – Lee and Town of Becket sharing rides to Smith Vocational.

2. PURCHASING

- **Comm-buys** – Comm-Buys is Massachusetts’ state bid program. When planning larger purchases, districts evaluate prices both through this program as well through an independent process. In some circumstances, if a product or service is not listed on the CommBuys system, but a vendor has been approved to provide this product or service, a district will take advantage of the opportunity to use the vendor and get the desired product or service from the approved vendor at the lowest possible price. Example; the new phone system at Wahconah Regional School District was recently purchased utilizing this.
- **Connecticut’s Collaborative Purchasing Group (CREC)** – copy paper and many other supplies
- **Hampshire Council of Governments** – Pittsfield purchases school art and office supplies through the annual HCOG bid, along with numerous.
- **Bulk purchasing within each district, as appropriate** – For example, the Central Office purchases all printer paper to receive a bulk discount either from another group or through individual vendor. When individual schools need paper supplies, the cost is transferred from the Central Office account to the school account, to accurately reflect costs.
- **Lower Pioneer Valley Educational Collaborative (LPVEC)** – Electricity and gas bidding – office supplies at discounted rates
- **Berkshire region Food Service bids** – Pittsfield bids bread, milk and food service paper and related products annually on a bid that is open and used by many Berkshire County districts.
- **403(b) Bid** – A 403(b) is a retirement plan for employees of public schools, to which employees can contribute annually. Changing IRS regulations and requirements have made the management of these plans more involved and fairly cost prohibitive for any district to manage this on their own, given most staffing models. Therefore, districts have engaged the services of a Third Party Administrator (TPA) specializing in these programs. Pittsfield participates in the group bid for TPA services for many western Massachusetts districts, which is organized through LPVEC.
• **Health Insurance** – The Berkshire Health Group (BHG) is a self-insured insurance association of Berkshire region schools and towns. By participating in this group, Berkshire Hills Regional, Lenox (town & school), and Southern Berkshire Regional get the benefits of reduced insurance rates and claims management. MIIA – Farmington River Regional, Lee, Richmond.

• **Health Insurance** – MIIA – The Massachusetts Municipal Association formed the (MIIA) to service the insurance needs of municipal entities. Through this program, the towns/districts save on all non-health insurance, including automobile, general liability, property and casualty, employee liability and umbrella insurance coverages. Most municipalities/districts also receive a dividend payback, which reduces costs even further due to length of participation.

• **Massachusetts Higher Education Collaborative (MHEC)** – New England purchasing consortium.

• **OT/PT services** – LPVEC hired former Southern Berkshire Educational Collaborative employees allowing districts to share these services.

• **GASB 45** – Many municipalities and school districts have collaboratively engaged the services if an actuarial firm to calculate the OPEB unfunded liabilities, per the federal GASB guideline. This collaboration saved time and money.

3. **SPECIAL EDUCATION SERVICES AND VOCATIONAL EDUCATION**

• **School Year** – Tuition enrollment between districts enables students to access appropriate educational programs and services for special education programs and vocational education, without each district needing to establish their own similar program, thereby eliminating the need to duplicate existing programs. Pittsfield accepts tuition students for school year programming.

• **Summer** – Each district can enroll age-appropriate students in a shared summer special education program held on the Berkshire Hills Regional School District campus.

4. **MEDICAID REIMBURSEMENTS**

• The requirements for Medicaid reimbursements make it fairly cost prohibitive for any district to manage this on their own, given most staffing models. Pittsfield utilizes expertise from Lower Pioneer Valley Educational Collaborative in processing its Medicaid reimbursements. Two processors (LPVEC and UMASS Medical School) are used by south Berkshire districts, both of which charge a fee, with UMASS being slightly lower. UMMS is also the state’s official Medicaid processor.

5. **E-RATE**

• Reimbursement from the federal government through a communications tax for schools and libraries programs. Some districts process on their own; others use a processor at a small fee.
6. VIRTUAL HIGH SCHOOL (VHS)

• Currently overseen by Berkshire Hills Regional School District for 5-district participation.

7. COOPERATIVE SPORTS PROGRAMS (within the MIAA parameters)

• Pittsfield Public Schools has several cooperative sports teams including wrestling (with Wahconah), ice hockey (with St. Joseph’s High School) and track and field at Taconic High School (with St. Joseph’s High School). In south Berkshire, crew, hockey, lacrosse, Lee/Lenox football, swimming

8. PROFESSIONAL DEVELOPMENT

• Examples of shared professional development in south Berkshire are: cross-district literacy and math professional development; creation of common professional development days throughout the school year, in order for educators from districts to participate in programs across the six districts; sheltered English Immersion (SEI) training.
• Pittsfield Public Schools serves as a host district to the Berkshires and surrounding regions for both teacher and administrator RETELL courses. Rethinking Equity and Teaching for English Language Learners (RETELL) is a DESE initiative that offers a systematic approach to Sheltered English Immersion (SEI) professional development designed to raise the achievement of Massachusetts’ English language learners by enhancing teachers’ knowledge and transforming instructional practices.
• Training on new DESE evaluation system conducted by Pittsfield Public Schools Deputy Superintendent – included other staff from Berkshire County.

9. ADDITIONAL COLLABORATION ACTIVITIES

• Sharing of bid document templates, mandated federal grant policy templates to maximize efficiencies and reduce redundancies. Membership in state-wide listservs for Superintendents and Business Administrators, providing access to a wide range of best practices.
• A consortium for ELL (Central Berkshire Regional, Adams-Cheshire Regional, Berkshire Hills Regional) – for Title III grant.
D. Sample Regional Boundaries Map

**Berkshire North (3748 students)**
- Adams
- Cheshire
- Clarksburg
- Florida
- Hancock
- Lanesborough
- + Monroe (Franklin County)
- New Ashford
- North Adams
- + Rowe (Franklin County)
- Savoy
- Williamstown

**Berkshire Central (7107 students)**
- Becket
- Dalton
- Hinsdale
- Peru
- Pittsfield
- Washington
- Windsor

**Berkshire South (4410 students)**
- Alford
- + Cummington (Hampshire County)
- Egremont
- Great Barrington
- Lee
- Lenox
- Monterey
- Mount Washington
- New Marlborough
- Otis
- Richmond
- Sandisfield
- Sheffield
- Stockbridge
- Tyringham
- West Stockbridge
## E. School Choice Analysis

<table>
<thead>
<tr>
<th>District</th>
<th>FY17 Receiving FTE</th>
<th>FY17 Receiving Tuition</th>
<th>FY17 Sending FTE</th>
<th>FY17 Sending Tuition</th>
<th>Choice FTE +/-</th>
<th>Choice Net Receiving Tuition FY17</th>
<th>Choice Net Sending Tuition FY17</th>
<th>Choice Net +/-</th>
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</thead>
<tbody>
<tr>
<td>CLARKSBURG</td>
<td>46.0</td>
<td>$269,598</td>
<td>26.0</td>
<td>$198,637</td>
<td>20.0</td>
<td>$269,598</td>
<td>$198,637</td>
<td>$70,961</td>
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<td>FLORIDA</td>
<td>3.0</td>
<td>$15,000</td>
<td>6.0</td>
<td>$32,247</td>
<td>-3.0</td>
<td>$15,000</td>
<td>$32,247</td>
<td>$17,247</td>
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<tr>
<td>HANCOCK</td>
<td>6.0</td>
<td>$30,000</td>
<td>5.0</td>
<td>$25,000</td>
<td>1.0</td>
<td>$30,000</td>
<td>$25,000</td>
<td>$5,000</td>
</tr>
<tr>
<td>LANCESBOROUGH</td>
<td>14.0</td>
<td>$76,421</td>
<td>20.0</td>
<td>$111,000</td>
<td>-6.0</td>
<td>$76,421</td>
<td>$111,000</td>
<td>$34,579</td>
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<tr>
<td>LEE</td>
<td>129.0</td>
<td>$744,908</td>
<td>106.0</td>
<td>$588,830</td>
<td>23.0</td>
<td>$744,908</td>
<td>$588,830</td>
<td>$156,078</td>
</tr>
<tr>
<td>LENOX</td>
<td>280.0</td>
<td>$1,463,904</td>
<td>40.0</td>
<td>$224,420</td>
<td>240.0</td>
<td>$1,463,904</td>
<td>$224,420</td>
<td>$1,239,484</td>
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<tr>
<td>NORTH ADAMS</td>
<td>36.0</td>
<td>$287,213</td>
<td>116.0</td>
<td>$681,682</td>
<td>-80.0</td>
<td>$287,213</td>
<td>$681,682</td>
<td>$394,469</td>
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<tr>
<td>PITTSFIELD</td>
<td>101.0</td>
<td>$593,343</td>
<td>506.0</td>
<td>$2,874,255</td>
<td>-405.0</td>
<td>$593,343</td>
<td>$2,874,255</td>
<td>$2,280,912</td>
</tr>
<tr>
<td>RICHMOND</td>
<td>85.0</td>
<td>$432,270</td>
<td>14.0</td>
<td>$75,815</td>
<td>71.0</td>
<td>$432,270</td>
<td>$75,815</td>
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<tr>
<td>SAVOY</td>
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<td>$79,305</td>
<td>14.0</td>
<td>$74,000</td>
<td>-1.0</td>
<td>$79,305</td>
<td>$74,000</td>
<td>$5,305</td>
</tr>
<tr>
<td>WILLIAMSTOWN</td>
<td>37.0</td>
<td>$264,540</td>
<td>4.0</td>
<td>$24,000</td>
<td>-33.0</td>
<td>$264,540</td>
<td>$24,000</td>
<td>$179,539</td>
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<tr>
<td>ADAMS CHESHIRE</td>
<td>45.0</td>
<td>$264,540</td>
<td>69.0</td>
<td>$434,079</td>
<td>-24.0</td>
<td>$264,540</td>
<td>$434,079</td>
<td>$169,539</td>
</tr>
<tr>
<td>BERKSHIRE HILLS</td>
<td>211.0</td>
<td>$1,206,292</td>
<td>113.0</td>
<td>$670,848</td>
<td>98.0</td>
<td>$1,206,292</td>
<td>$670,848</td>
<td>$535,444</td>
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<tr>
<td>CENTRAL BERKSHIRE</td>
<td>167.0</td>
<td>$1,041,406</td>
<td>178.0</td>
<td>$1,048,139</td>
<td>-11.0</td>
<td>$1,041,406</td>
<td>$1,048,139</td>
<td>$6,733</td>
</tr>
<tr>
<td>FARMINGTON RIVER</td>
<td>18.0</td>
<td>$105,080</td>
<td>50.0</td>
<td>$289,325</td>
<td>-32.0</td>
<td>$105,080</td>
<td>$289,325</td>
<td>$184,245</td>
</tr>
<tr>
<td>MOUNT GREYLOCK</td>
<td>62.0</td>
<td>$356,625</td>
<td>31.0</td>
<td>$172,556</td>
<td>31.0</td>
<td>$356,625</td>
<td>$172,556</td>
<td>$184,069</td>
</tr>
<tr>
<td>SOUTHERN BERKSHIRE</td>
<td>120.0</td>
<td>$700,052</td>
<td>101.0</td>
<td>$559,761</td>
<td>25.0</td>
<td>$700,052</td>
<td>$559,761</td>
<td>$200,291</td>
</tr>
<tr>
<td>BERKSHIRE COUNTY TOTAL</td>
<td>1,379.0</td>
<td>$7,938,658</td>
<td>1,399.0</td>
<td>$8,084,594</td>
<td>-20.0</td>
<td>$7,938,658</td>
<td>$8,084,594</td>
<td></td>
</tr>
<tr>
<td>STATE TOTAL</td>
<td>16,016.0</td>
<td>$97,927,768</td>
<td>16,016.0</td>
<td>$97,927,768</td>
<td></td>
<td>$97,950,517</td>
<td>$97,950,517</td>
<td></td>
</tr>
</tbody>
</table>

% state total of choice enrollment = 8.6%
Berkshire’s % of state enrollment = 1.6%
Berkshire County participates at a rate 5.375 times greater than statewide use of choice

Source: DESE
### F. Assessing Five Scenarios against 34 Educational, Financial and Implementation/Operational Criteria

#### GOAL #1: All students will have improved and more equitable access to - and opportunity for success in - high quality career pathways, enrichment and elective courses, and co-curricular activities.

<table>
<thead>
<tr>
<th>DIMENSIONS</th>
<th>SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td>17 Districts (Status Quo)</td>
<td>Three Regional Modified Supervisory Unions</td>
</tr>
<tr>
<td>GOAL #1: All students will have improved and more equitable access to - and opportunity for success in - high quality career pathways, enrichment and elective courses, and co-curricular activities.</td>
<td>1a</td>
</tr>
<tr>
<td>1b</td>
<td>Aligned curriculum across districts: curriculum is aligned vertically, horizontally and to state standards to facilitate within-district student transitions and cross-district school choice</td>
</tr>
<tr>
<td>1c</td>
<td>Aligned school schedules: to support shared staffing and distance learning</td>
</tr>
<tr>
<td>1d</td>
<td>Easier access to partnerships with third parties, e.g., colleges &amp; universities, non-profits, collaboratives, vocational-technical schools</td>
</tr>
<tr>
<td>1e</td>
<td>More shared staff for electives and career pathways to increase breadth</td>
</tr>
<tr>
<td>1f</td>
<td>More shared resources for co-curricular activities to increase breadth of offerings</td>
</tr>
<tr>
<td>1g</td>
<td>More supervision, professional development and coaching that is also more cost-effective</td>
</tr>
<tr>
<td>1h</td>
<td>Increased job-alike collaboration</td>
</tr>
<tr>
<td>1i</td>
<td>Increased cohort size to expand offerings</td>
</tr>
<tr>
<td>1j</td>
<td>More student and educator access to effective technology tools and distance learning through a shared technology platform and support</td>
</tr>
<tr>
<td>1k</td>
<td>More equitable access to offerings</td>
</tr>
</tbody>
</table>

#### GOAL #2: All students will have enhanced safety nets to support their academic and life success, e.g., guidance counseling, reading services, curriculum for social-emotional learning, special education services.

<table>
<thead>
<tr>
<th>DIMENSIONS</th>
<th>SCENARIOS</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>#2</td>
</tr>
<tr>
<td>17 Districts (Status Quo)</td>
<td>Three Regional Modified Supervisory Unions</td>
</tr>
<tr>
<td>GOAL #2: All students will have enhanced safety nets to support their academic and life success, e.g., guidance counseling, reading services, curriculum for social-emotional learning, special education services.</td>
<td>2a</td>
</tr>
<tr>
<td>2b</td>
<td>Aligned curriculum across districts: curriculum is aligned vertically, horizontally and to state standards to facilitate within-district student transitions and cross-district school choice</td>
</tr>
<tr>
<td>2c</td>
<td>Aligned school schedules: to support shared staffing</td>
</tr>
<tr>
<td>2d</td>
<td>Easier access to partnerships with third parties, e.g., colleges &amp; universities, community health agencies, collaboratives</td>
</tr>
<tr>
<td>2e</td>
<td>Shared highly specialized staff to provide more effective student supports, e.g., ESL teacher, behavior interventionist, autism specialist</td>
</tr>
<tr>
<td>2f</td>
<td>More supervision, professional development and coaching for support staff that is also more cost-effective</td>
</tr>
<tr>
<td>2g</td>
<td>Increased job-alike collaboration for support staff &amp; specialists</td>
</tr>
<tr>
<td>2h</td>
<td>Increased cohort size to increase size of intervention and remediation groups with similar needs</td>
</tr>
<tr>
<td>2i</td>
<td>More equitable access to safety net and supports</td>
</tr>
</tbody>
</table>
**GOAL 3:**
Taxpayers will have a more equitable and fiscally sustainable way of funding education and other municipal services.

<p>| | | | | | |</p>
<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td><strong>3a</strong></td>
<td>More specialized, focused and efficient operations leadership e.g., human resources, transportation, finance</td>
<td>Little</td>
<td>Some</td>
<td>Moderate</td>
<td>A lot</td>
</tr>
<tr>
<td><strong>3b</strong></td>
<td>Managing operational costs</td>
<td>Savings:</td>
<td>None</td>
<td>Some</td>
<td>Some</td>
</tr>
<tr>
<td></td>
<td>Ease:</td>
<td>Hard</td>
<td>Moderate</td>
<td>Moderate</td>
<td>Easy</td>
</tr>
<tr>
<td><strong>3c</strong></td>
<td>Managing cohort and class size costs</td>
<td>Savings:</td>
<td>Little</td>
<td>Little</td>
<td>Little</td>
</tr>
<tr>
<td></td>
<td>Ease:</td>
<td>Hard</td>
<td>Hard</td>
<td>Hard</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>3d</strong></td>
<td>Managing future declining enrollment</td>
<td>Savings:</td>
<td>None</td>
<td>Little</td>
<td>Little</td>
</tr>
<tr>
<td></td>
<td>Ease:</td>
<td>Hard</td>
<td>Hard</td>
<td>Hard</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>3e</strong></td>
<td>“Bang for the Buck” (chances for improved quality of operational services)</td>
<td>Little</td>
<td>Moderate</td>
<td>Moderate</td>
<td>A lot</td>
</tr>
</tbody>
</table>

**EASE OF IMPLEMENTATION**

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
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<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>4a</strong></td>
<td>Managing debt</td>
<td>Easy</td>
<td>Easy</td>
<td>Easy</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>4b</strong></td>
<td>Maintaining school choice</td>
<td>Easy</td>
<td>Easy</td>
<td>Easy</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>4c</strong></td>
<td>Stakeholders required to implement, e.g., Town Meetings, Finance Committees, School Committees, Select Boards</td>
<td>Few</td>
<td>Some</td>
<td>Many</td>
<td>Many</td>
</tr>
<tr>
<td><strong>4d</strong></td>
<td>Dealing with contractual, legal and regulatory requirements for implementation</td>
<td>Easy</td>
<td>Moderate</td>
<td>Challenging</td>
<td>Hard</td>
</tr>
</tbody>
</table>

**EASE OF OPERATION**

<p>| | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>5a</strong></td>
<td>Maintaining local control over budget, curriculum, policy</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Low</td>
</tr>
<tr>
<td><strong>5b</strong></td>
<td>Maintaining local control over school closing and configuration</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>5c</strong></td>
<td>Sustaining local ownership and engagement</td>
<td>High</td>
<td>High</td>
<td>High</td>
<td>Moderate</td>
</tr>
<tr>
<td><strong>5d</strong></td>
<td>Managing stakeholder entities to operate: number of stakeholders required (Town Meetings, Finance Committees, School Committees, Select Boards)</td>
<td>Few</td>
<td>Some</td>
<td>Many</td>
<td>Many</td>
</tr>
<tr>
<td><strong>5e</strong></td>
<td>Managing the district, e.g., budgeting and reporting, collective bargaining, school committee meetings, business and personnel operations</td>
<td>Easy</td>
<td>Hard</td>
<td>Very Hard</td>
<td>Easy</td>
</tr>
</tbody>
</table>
G. Financial Modeling – Details on Assumptions Made

I. Area 1: Central Office: Superintendent & Assistant Superintendents

a. Roles included:
   i. Superintendent
   ii. Assistant Superintendent (including Deputy Superintendents)
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed 1 Superintendent per entity
   ii. Assumed 1 Assistant Superintendent per entity
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed 1 Superintendent per entity
   ii. Assumed 1 Assistant Superintendent for North, Central, and South regions
e. For Scenario #4: Regional Districts
   i. Assumed 1 Superintendent per entity
   ii. Assumed 1 Assistant Superintendent per entity
f. For Scenario #5: Countywide District
   i. Assumed 1 Superintendent per entity
   ii. Assumed 1 Assistant Superintendent for business focus and 1 for academic focus

II. Area 2: Central Office: Non-Academic

a. Roles included:
   i. Business Administrator (including Business Managers)
   ii. Operations Director
   iii. Human Resources Director (including Central Office Support Specialist)
   v. Clerical Staff (including Secretary and Administrative Assistant)
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed 1 Business Administrator per entity
   ii. Assumed 0.5 FTE Operations Director per entity
   iii. Assumed 1 Human Resources Director per entity
   iv. Assumed 33% reduction in Business, Payroll, & Purchasing staff
   v. Assumed 33% reduction in Clerical Staff
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed 1 Business Administrator per entity
   ii. Assumed 1 Operations Director per entity
iii. Assumed 1 Human Resources Director for North, Central, and South regions
iv. Assumed 33% reduction in Business, Payroll, & Purchasing staff
v. Assumed 33% reduction in Clerical Staff
e. For Scenario #4: Regional Districts
   i. Assumed 1 Business Administrator per entity
   ii. Assumed 0.5 FTE Operations Director per entity
   iii. Assumed 0 Human Resources Directors – responsibilities covered by Assistant Superintendent
   iv. Assumed 50% reduction in Business, Payroll, & Purchasing staff
   v. Assumed 50% reduction in Clerical Staff
f. For Scenario #5: Countywide District
   i. Assumed 1 Business Administrator per entity
   ii. Assumed 1 Operations Director per entity
   iii. Assumed 1 Human Resources Director per entity
   iv. Assumed 50% reduction in Business, Payroll, & Purchasing staff
   v. Assumed 50% reduction in Clerical Staff

III. Area 3: Central Office: Academic

a. Roles included:
   i. Curriculum & Instruction Director (including Curriculum Director, Director of Learning and Teaching, District Curriculum Coordinator, and Director of Curriculum, Instruction, & Assessment)
   ii. Student Services / Special Education Director (including Director of Student Services, Student Services Coordinator, and Student Services Facilitator)
   iii. Technology Director (including Technology Coordinator, IT Coordinator, Tech Supervisor, and District Instructional Tech Coordinator)
   iv. Content Area Director (including District Digital Learning Leader, Co-Curricular Director, Director of Fine Arts, ELL Coordinator, District Drama Coordinator, Social Studies Coordinator, K-12 Coordinator, K-12 Science Coordinator, and Director of PD)
   v. Grants/Title I Director (including Director of Title I)

b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed 0 Curriculum & Instruction Directors – responsibilities covered by Assistant Superintendent
   ii. Assumed 2 Student Services / Special Education Directors (1 SPED and 1 Student Services) per entity
   iii. Assumed 1 Technology Director per entity
   iv. Assumed 0.5 FTE Content Area Directors per entity
   v. Assumed 1 Grants/Title I Director per entity
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed 1 Curriculum & Instruction Director per entity
ii. Assumed 1 Student Services / Special Education Director per entity
iii. Assumed 1 Technology Director per entity with an assistant
iv. Assumed 1 Content Area Director per entity
v. Assumed 1 Grants/Title I Director with an assistant
e. For Scenario #4: Regional Districts
   i. Assumed 0 Curriculum & Instruction Directors – responsibilities covered by Assistant Superintendent
   ii. Assumed 0 Student Services / Special Education Directors – responsibilities covered by Assistant Superintendent
   iii. Assumed 1 Technology Director per entity
   iv. Assumed 1 Content Area Director with an assistant
   v. Assumed 1 Grants/Title I Director per entity
f. For Scenario #5: Countywide District
   i. Assumed 1 Curriculum & Instruction Director per entity
   ii. Assumed 1 Student Services / Special Education Director with an assistant
   iii. Assumed 1 Technology Director per entity with an assistant
   iv. Assumed 1 Content Area Director with an assistant
   v. Assumed 1 Grants/Title I Director per entity

IV. Area 4: Transportation

a. Sub-areas included:
   i. Professional Staff
   ii. Clerical Staff
   iii. General Education Students
   iv. School Choice Transportation
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed 10% efficiency in cost of transporting General Education students.
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed 10% efficiency in cost of transporting General Education students.
e. For Scenario #4: Regional Districts
   i. Assumed 15% efficiency in cost of transporting General Education students.
   ii. Assumed reimbursement for 75% of General Education students currently not in regionalized districts & assumed 20% of General Education students ineligible for reimbursement due to 1.5 miles radius restriction.
   iii. Assumed added cost of transporting School Choice students with reimbursement.
f. For Scenario #5: Countywide District
   i. Assumed 15% efficiency in cost of transporting General Education students.
   ii. Assumed reimbursement for 75% of General Education students currently not in regionalized districts & assumed 20% of General Education students ineligible for reimbursement due to 1.5 miles radius restriction.
   iii. Assumed added cost of transporting School Choice students with reimbursement.
V. **Area 5: School Choice**  
  
  a. Sub-areas included:  
     i. Revenue generated by School Choice students  
     ii. Costs generated by School Choice students  
  
  b. For Scenario #1: No Change  
     i. Assumed 2016-2017 budget data.  
  
  c. For Scenario #2: Regional Modified Supervisory Unions  
     i. Assumed no change to 2016-2017 budget data  
  
  d. For Scenario #3: Countywide Modified Supervisory Union  
     i. Assumed no change to 2016-2017 budget data  
  
  e. For Scenario #4: Regional Districts  
     i. Assumed no change to 2016-2017 budget data  
  
  f. For Scenario #5: Countywide District  
     i. Assumed no change to 2016-2017 budget data  

VI. **Area 6: Food Services**  
  
  a. Sub-areas included:  
     i. Director of Food Service  
     ii. Support Staff  
  
  b. For Scenario #1: No Change  
     i. Assumed 2016-2017 budget data.  
  
  c. For Scenario #2: Regional Modified Supervisory Unions  
     i. Assumed 1 Director of Food Service per entity  
     ii. Assumed no change to Support Staff  
  
  d. For Scenario #3: Countywide Modified Supervisory Union  
     i. Assumed 1 Director of Food Service with an assistant  
     ii. Assumed no change to Support Staff  
  
  e. For Scenario #4: Regional Districts  
     i. Assumed 1 Director of Food Service per entity  
     ii. Assumed no change to Support Staff  
  
  f. For Scenario #5: Countywide District  
     i. Assumed 1 Director of Food Service with an assistant  
     ii. Assumed no change to Support Staff  

VII. **Area 7: Substitute Teachers and other Staff**  
  
  a. Sub-areas included:  
     i. General Education Substitute Teachers  
     ii. Special Education Substitute Teachers  
     iii. Long-term Substitute Teachers
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data

c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed no change to 2016-2017 budget data

d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed no change to 2016-2017 budget data

e. For Scenario #4: Regional Districts
   i. Assumed no change to 2016-2017 budget data

f. For Scenario #5: Countywide District
   i. Assumed no change to 2016-2017 budget data

VIII. Area 8: Legal

a. For Scenario #1: No Change
   i. Assumed a “bargaining year” (of maximum expenditure) occurred every 3 years and a “representative year” would be 1/3 of maximum expenditure data from previous several years

b. For Scenario #2: Regional Modified Supervisory Unions
   i. No change to representative year

c. For Scenario #3: Countywide Modified Supervisory Union
   i. No change to representative year

d. For Scenario #4: Regional Districts
   i. No change to representative year

e. For Scenario #5: Countywide District
   i. No change to representative year

IX. Area 9: Custodial

a. Sub-areas included:
   i. Custodial Supervisor
   ii. Support Staff

b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.


   c. For Scenario #2: Regional Modified Supervisory Unions
      i. Assumed 1 Custodial Supervisor per entity
      ii. Assumed no change to Support Staff

   d. For Scenario #3: Countywide Modified Supervisory Union
      i. Assumed 1 Custodial Supervisor with an assistant
      ii. Assumed no change to Support Staff

   e. For Scenario #4: Regional Districts
      i. Assumed 1 Custodial Supervisor per entity
      ii. Assumed no change to Support Staff

   f. For Scenario #5: Countywide District
i. Assumed 1 Custodial Supervisor with an assistant  
ii. Assumed no change to Support Staff

X. Area 10: Maintenance

a. Sub-areas included:  
   i. Maintenance Supervisor (including Building & Grounds Manager)  
   ii. Support Staff  
b. For Scenario #1: No Change  
i. Assumed 2016-2017 budget data.  
c. For Scenario #2: Regional Modified Supervisory Unions  
i. Assumed 1 Maintenance Supervisor per entity  
ii. Assumed no change to Support Staff  
d. For Scenario #3: Countywide Modified Supervisory Union  
i. Assumed 1 Maintenance Supervisor with an assistant  
ii. Assumed no change to Support Staff  
e. For Scenario #4: Regional Districts  
i. Assumed 1 Maintenance Supervisor per entity  
ii. Assumed no change to Support Staff  
f. For Scenario #5: Countywide District  
i. Assumed 1 Maintenance Supervisor with an assistant  
ii. Assumed no change to Support Staff

XI. Area 11: Student Support Services: Nursing, Guidance, ELL

a. Sub-areas included:  
   i. Guidance Counselors  
   ii. Adjustment Counselors  
   iii. School Nurses  
   iv. ELL/ESL Teachers  
b. For Scenario #1: No Change  
i. Assumed 2016-2017 budget data.  
c. For Scenario #2: Regional Modified Supervisory Unions  
i. Assumed no change to 2016-2017 budget data  
d. For Scenario #3: Countywide Modified Supervisory Union  
i. Assumed no change to 2016-2017 budget data  
e. For Scenario #4: Regional Districts  
i. Assumed no change to 2016-2017 budget data  
f. For Scenario #5: Countywide District  
i. Assumed no change to 2016-2017 budget data

XII. Area 12: General Education Staffing
a. Sub-areas included:
   i. General Education Teachers
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed no change to 2016-2017 budget data
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed no change to 2016-2017 budget data
e. For Scenario #4: Regional Districts
   i. Assumed no change to 2016-2017 budget data
f. For Scenario #5: Countywide District
   i. Assumed no change to 2016-2017 budget data

XIII. Area 13: Special Education

a. Sub-areas included:
   i. Special Education Staff:
      1. Special Education Teachers
      2. Special Education Paraprofessionals
      3. Occupational Therapists & COTA
      4. Physical Therapists
      5. Speech and Language Pathologist
      6. School Psychologists SPED/NON-SPED
      7. School Social Worker
      8. Other Related Special Education Staff
   ii. Legal Needs/Settlements
   iii. Tuition to Other School Districts
b. For Scenario #1: No Change
   i. Assumed 2016-2017 budget data.
c. For Scenario #2: Regional Modified Supervisory Unions
   i. Assumed no change to Special Education Staff
   ii. Assumed no change to Legal Needs/Settlements
   iii. Assumed 10% of Special Education to be done in house at ½ cost
d. For Scenario #3: Countywide Modified Supervisory Union
   i. Assumed no change to Special Education Staff
   ii. Assumed no change to Legal Needs/Settlements
   iii. Assumed 10% of Special Education to be done in house at ½ cost
e. For Scenario #4: Regional Districts
   i. Assumed no change to Special Education Staff
   ii. Assumed no change to Legal Needs/Settlements
   iii. Assumed 20% of Special Education to be done in house at ½ cost
f. For Scenario #5: Countywide District
   i. Assumed no change to Special Education Staff
   ii. Assumed no change to Legal Needs/Settlements
iii. Assumed 20% of Special Education to be done in house at 1/2 cost

**Additional Financial Modeling Component 1: Managing Class and Cohort Size**
- Assumed 2016-2017 DESE data on class sizes.

**Additional Financial Modeling Component 2: Managing Future Declining Enrollment**
- Assumed declining enrollment per Phase 1 Donahue Report.

**General Financial Modeling Details**

**Fringe Benefits:**
1. Assumed weighted average (by FTE count) of Berkshire County district benefits expenditures from 2016-2017 data
2. Source: DESE