

**PRÉCIS of**  
***Berkshire County Education Task Force Planning Study,***  
***Phase One Final Report, October 2016***

**Submitted by**  
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**1. Introduction**

On October 2016, pursuant to an agreement made in Spring 2016 with the University of Massachusetts Donahue Institute (UMDI), the Berkshire County Education Task Force (BCETF or “Task Force”), received a report from UMDI entitled, *Berkshire County Education Task Force Planning Study, Phase One Final Report, October 2016*. Receipt of this document constitutes completion of the first of a two-phase effort. The Phase One study was intended to review and confirm evidence that decreased enrollment, rising costs, and declining or flat revenues pose challenges to the quality of the education provided by Berkshire County’s public schools. Phase Two of the Task Force’s work will consist of developing workable and sustainable recommendations for addressing the problems identified in Phase One. After being vetted by the Task Force, those recommendations will be presented for consideration and possible action to Berkshire County’s school committees, boards of selectmen, city councils, and community at large.

The *Phase One Final Report* concludes that “the evidence reviewed and presented to UMDI clearly indicates that the quality of education in Berkshire County is being threatened by these factors [i.e., decreased enrollment, rising costs, and declining or flat revenues], with program impacts already being experienced in some districts and signs of potential program impacts over time in most districts” [*emphasis added*] (*Report*, p. 52).

**2. Literature Review**

As part of the Phase One work, UMDI undertook a review of the large and varied literature dealing with remodeled educational organizations, including studies of varieties of shared services and experiences with consolidated districts. Shared services are already in place in areas of Berkshire County, and sometimes prove effective programmatically and financially. Studies done of districts’ consolidation are inconclusive in identifying effective and easily replicated models.

**3. Evidence**

UMDI’s Phase One study examined three areas of evidence -- enrollment trends; cost and revenue trends; and educational program trends -- that could substantiate the existence of serious problems for Berkshire County’s current public education system. Sources of such evidence include: reports filed by school districts with the Massachusetts Department of Elementary & Secondary Education (DESE); populations and fiscal studies conducted by the Berkshire Regional Planning Commission; the Commonwealth of Massachusetts Department of Revenue; data projection models based on state-wide information available to UMDI researchers; and two rounds of interviews with school district administrators, one exclusively of past or current administrators with at least 15 years of experience in Berkshire County education. Evidence of major problems, both extant and projected, can be found in each evidentiary area examined.

### A. Enrollment Trends.

Past, current, and projected student enrollment vary from district to district throughout Berkshire County. Nevertheless, with the exception of the Berkshire Arts & Technology Charter School (BaRT) and Northern Berkshire Regional Vocational-Technical High School (McCann) -- each of which admits students selectively, either by a lottery of those seeking admission or on satisfaction of admission criteria, and each of which draws its students from the populations of other districts -- all jurisdictions' enrollments have declined appreciably from the 1999-2000 school year to the 2014-2015 school year. Overall, Berkshire County's public school enrollment declined 22.3% in that 15-year period. By way of contrast, student enrollment in the Commonwealth of Massachusetts declined overall by only 1.7% in the same period.

Using four different enrollment projection models (*see Report*, p. 10), the Phase One study concludes that from 2015 to 2025 the County will experience a further enrollment loss of 10.8%; and from 2025 to 2035, the anticipated loss will be an additional 6.5%. Of students enrolled in Berkshire County, the percentage of those who were low income in 2015 (34.0%) exceeded the Commonwealth's percentage overall (26.3%). Similarly, a difference was found in the County's 2015 percentage of special education students (17.7%) *vis-à-vis* the percentage of such students in Massachusetts overall (17.1%). Of note is that in each case, with both low income and special needs students, Berkshire County's percentages had been lower than the state percentages in 2005.

### B. Cost & Revenue Trends.

UMDI found that from 2005 to 2015 total public school expenditures in Berkshire County grew 27%, with increases attributable in large part to negotiated compensation rates for school employees (which nevertheless has risen at a slower rate than teacher salaries have risen state-wide), employee health insurance, and special education services. The Commonwealth's Chapter 70 general aid to school districts and towns increased by 23% during that time, whereas tax levies in the County's various towns and cities rose by 49%.

Though there is wide variation among of towns and cities, and therefore among school districts, of municipalities' statutory taxing capacity, the overall tax levy as a percentage of assessed value changed from 1.31% in the period 2000-2005, to 1.19% in 2006-2010, to 1.52% in 2016. This suggests that many municipalities are utilizing a portion of their remaining taxing capacity to support their educational expenditures. Proposition 2½ override capacity likewise varies widely from town to town, with some municipalities, including those educating large percentages of County students, at or near their levy ceilings. Unused building capacity, which increases districts' per pupil costs, is extensive throughout Berkshire County.

### C. Educational Program Trends.

Berkshire County's enrollment decline between the 2004-2005 and 2014-2015 school years has been accompanied by a reduction in full-time equivalent (FTE) teachers, from 1,684 to 1,429. This is consistent with reported program losses in that period in foreign languages, instructional technology, curriculum development, and librarian services. Reductions or eliminations reported have also included staff, and therefore programming, be it sections or actual subjects, in graphic arts, performing arts, music, and physical education, as well as in those noted above. Districts have reduced Advanced Placement (AP) sections, and certain

vocational offerings in comprehensive high schools (e.g., house building, culinary arts, automotive repair, and drafting) have been eliminated or reduced, as well.

What is more, school and district administrators reported that it has grown increasingly common for multiple levels of courses to be taught by one teacher in the same classroom at the same time. This cost saving measure adversely affects the quality of subject matter coverage and time for teachers to attend to the needs and abilities of individual students. Academic support services for students in need of additional or specialized subject matter assistance have also been reduced, as have guidance and school adjustment counseling services. In addition, athletics and other extra-curricular activities have been cut or reduced, as has late transportation for students wishing to participate in extra-curricular programs. This has as a consequence reduction of the opportunities for some students in large, rural districts to participate at all. The perception among those interviewed by UMDI is that the cumulative effect of these reductions and cuts has been to diminish the quality of the educational opportunities available to students in their districts.

#### **4. Past & Future Strategies for Improving Financial Sustainability**

Many Berkshire County districts currently share services with one another, or with the government of the community or communities in which they operates, or both. The needs being addressed through these arrangements include special education, health care services, personnel matters, professional development, athletics, and administrative leadership. Regional efforts, led by the Southern Berkshire Shared Services Project, as well as by a more recent, comparable effort in northern Berkshire County, are also underway.

Among cost saving steps taken by districts have been the closing of schools, coöperative purchasing for energy and supplies, and elimination of positions within districts or schools through consolidation of functions. There are currently no plans for, nor are there on-going discussions about, consolidating school districts. UMDI's Phase One study reports that "[i]ssues of educational quality are clearly paramount to many stakeholders and must be prioritized alongside financial considerations when exploring potential regionalization processes" (*Report*, p. 48).

#### **5. Conclusions & Recommendations**

UMDI's *Phase One Final Report* states that if recent economic trends in Berkshire County continue, then "there will be substantial strain on school district finances . . . [M]any districts will likely need to make changes in the services they provide . . . [including] reduc[ing] academic, extracurricular, and/or support services . . . increasing class sizes, reducing the number of sections of certain courses, offering multiple courses or course levels in a single classroom, increasing the use of on-line courses and other technology-assisted academic work, combining extracurricular activities across schools or districts, and instituting or increasing participation fees . . . [as well as taking] steps toward regionalization efforts" (*Report*, p. 53).

The *Phase One Final Report* advises moving on to Phase Two by looking closely at, and with due consideration given to the consequences of, further sharing of services and greater regionalization. ". . . [G]iven the complexity of achieving agreement regarding regionalization among even two or three districts, feasibility of super regions is a key question" (*Report*, p. 56).