



Historical Review

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Note: This report will be updated as additional information is requested, edits are required, and content is added. The date stamp (under the title) will signal the most current version.

HISTORICAL REVIEW OF REGIONALIZATION AND COLLABORATION EFFORTS OF ASHFIELD, BUCKLAND, CHARLEMONT, COLRAIN, HAWLEY, HEATH, PLAINFIELD, AND SHELBURNE TO IMPROVE EDUCATION AND ACHIEVE GREATER EFFICIENCY

“The more you know about the past, the better prepared you are for the future.”
Theodore Roosevelt

The purpose of this report is to review documents, newspaper articles, research, and studies pertaining to consolidation, regionalization, and shared services among the towns comprising the Mohawk Trail Regional School District (MTRSD) and the Hawlemont Regional School District from the time of formation to the present. The aim is to provide historical context for the work of the current 2District8Towns initiative in the belief that there are lessons to be learned from previous efforts. Additionally, we will provide a high level summary of findings and recommendations of state officials, state working groups, and national best practices as related to rural school districts.

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ABSTRACT

Nearly seventy years ago, the towns of Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield, Rowe, and Shelburne began a discussion on regionalization and collaboration that continues to this day. Over the past 17 years the towns have repeatedly formed study groups and/or hired consultants to conduct research on the topics of enrollment, facilities, finance, regionalization, and collaboration in their attempts to provide the highest quality education and to contain costs. The research has resulted in recommendations that are listed in [Appendix A](#).

This report examines the seven major initiatives on regionalization and long range planning that took place between 1956 and 2017. This report also presents a summary of state sponsored studies and reports that have looked at rural Massachusetts districts from the perspective of regionalization and formal collaboration. The report also reviews the promising practices in rural education and available resources. Finally, the paper presents some common themes found in the seven initiatives that might inform the current efforts of the 2District8Towns initiative.

The paper argues that historical concerns in regard to educational quality, vocational opportunities, declining enrollment, building needs, and fiscal efficiency continue to be the driving factors (both incentives and disincentives) motivating those discussions, and that solutions to these concerns can be crafted, but will require engagement of and support from a broad set of stakeholders.

I. INTRODUCTION:

The formation of the 2District8Towns initiative is the latest in a series of efforts between and among the towns of Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield, and Shelburne to provide a quality education to the children of those communities. Rowe has been included in this report as it was a founding member of the MTRSD and has a long history of collaboration with the 2District8Towns members.

The earliest initiatives occurred during the 1950s and 1960s when the towns engaged in the formal process created in the 1949 [Massachusetts General Law Ch. 71, Section 14](#) to form regional school districts.

This report is based on a review of studies commissioned as a part of these initiatives, district documents related to the initiatives, newspaper articles that reported on meetings and town votes related to the initiatives, archival materials from local libraries, and limited interviews with individuals who participated in one or more of the initiatives.

II. HISTORICAL REVIEW OF MOHAWK TRAIL REGIONALIZATION AND COLLABORATION EFFORTS:

A BRIEF HISTORY OF THE ORGANIZATION OF PUBLIC EDUCATION IN THE UNITED STATES

"What's past is prologue"

The Tempest, Act 2, Scene I, Shakespeare

Origins of Public Education in MA.

The origins of compulsory public education in Massachusetts and throughout the United States can be traced to the passage of the Old Deluder Satan Act in 1647 by the Massachusetts Bay Colony. This law required, 1. "every Township in this Jurisdiction, after the Lord hath increased them to the number of fifty Householdors, shall then forthwith appoint one within their town to teach all such children as shall resort to him to write and read, whose wages shall be paid either by the Parents or Masters of such children, or by the Inhabitants in general, by way of supply, as the major part of those that order the prudentials of the Town shall appoint. Provided that those which send their children be not oppressed by paying much more than they can have them taught for in other towns. 2 "And it is further ordered, that where any town shall increase to the number of one hundred Families or House holders, they shall set up a Grammar-School, the Masters thereof being able to instruct youth so far as they may be fitted for the Universitie."

This law is recognized as foundational in the establishment of a template for all public education in the United States. The act established several principles (Carelton, Lynch, O'Donnell, 2009) upon which public primary and secondary education continues to rest today: 1) that basic education is a public or community responsibility; 2) that the state can require communities to raise and expend local funds for schools; 3) that day-to-day responsibility for the operation of schools rests at the local level; and 4) that schools are to be organized in levels separating elementary from secondary education.

The principles are responsible for both the success of public education in the United States and the problems which continue to plague our education system. Principle 1 resulted in the public commitment to educate all children in our country. Principle 4 established a structure that has been copied by countries around the world.

The 2nd and 3rd principles are more problematic. Principle 2, which charged local communities with the financial responsibility for public education, has resulted in vast disparities in education spending across the nation, disparities which correlate to the quality of education. Principle 3 has resulted in parochialism, resistance to change, and endless duplication of effort justified by the illusion of local control (Pearlman, 2016). One might imagine that local control would result in diversity and yet, across the nation, school organization and pedagogy look pretty much identical in form.

By 1930 there were 130,000 school districts spread across the country with an average population of just 150 students. The vast majority were rural primary (ages 5-9) and grammar schools (ages 10-14). This proliferation of small rural districts became unnecessary and unsustainable as the population shifted from rural to urban. Then as now, reorganization of public school funding and organization was required in those communities that experienced population shifts and economic changes. The 130,000 United States districts that existed in 1930 were eventually winnowed down to 13,588 by 2010 according to the US census. Most small school districts ceased to exist or consolidated as the population left the countryside to move to towns and cities, but geography and demographics guaranteed the

persistence of some small rural school districts. The school districts in Franklin County, Massachusetts fall into this category.

The Organization of Schools in the Nine Towns, Origins.

The nine towns of Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield, Rowe, and Shelburne had funded their own schools in accordance with the state law since the time of their incorporation. For example, Ashfield, incorporated in 1765, has town meeting records that record the following, "March 31, 1766, By Varto of a warrant from the selectmen of sd town it was voted for the uk of the Scool 4 pounds." Each of the towns maintained schools and hired teachers to educate students between the ages of 5-14. Given the limitations of early transportation infrastructure, multiple schools were located so that students could access them. Consolidation of schools began as populations grew and transportation infrastructure improved. Using Ashfield as an example, in 1910, there were nine district schools which were consolidated into a single district school in 1939.

While all of the nine towns provided schools for the education of students between the ages of 5-14 in the form of Grammar Schools, secondary education was not commonplace prior to 1900 and even then secondary schools were established in three of the nine towns. Ashfield was the first of the towns to provide secondary education. Sanderson Academy, was established in Ashfield in 1816 to provide education beyond the Grammar School level. It was attended by students from Ashfield and surrounding towns. The Trustees of the school were active until 1866 but then there was an interruption and they did not convene again until 1877. The Sanderson Academy reopened in a new location in 1879. Shelburne opened a private Secondary School, Arms Academy, in 1880 and it became a public secondary school in 1894. Arms Academy served the students of Shelburne Falls and surrounding towns. We discovered a 1908 picture of Charlemont High School but are unsure of the exact date it opened. Like the other high schools it served the students of its town and accepted students from neighboring towns.

The goal of secondary education for all students began in the late 19th century and was codified in 1892 by a working group of educators, known as the "Committee of Ten " which was established by the National Education Association. The period from 1910 to 1940 is sometimes described as the High School Movement because an increasing percentage of students began to attend secondary schools. In 1910 only 18% of students 15-18 attended a high school. That percentage rose to 73% by 1940. This increase coincided with compulsory school attendance. The increase in demand for a high school education strained the existing institutions as more students were required to attend high school.

The nine towns of Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield, Rowe, and Shelburne were faced with the obligation to educate high school aged students, but without the legal frameworks in place for the towns to collaborate and share costs. The passage of [MGL Chapter 71 14B](#), the Regional Schools Act, in 1949, provided all small towns and rural communities in Massachusetts with a legal framework in which to form regional school districts that could better manage the costs and quality of public education. Charlemont and Hawley were among the early adopters when they formed a Regional District Planning Board (RSDPB) in the early 1950s, which resulted in the formation of the Hawlemont Regional School District in 1953. Buckland, Charlemont, Colrain, Hawley, Heath, and Shelburne also formed a RSDPB to explore the possibility of regionalization.

First MTRSD Formation 1956

The impetus for regionalization efforts among the nine towns was the need for a comprehensive high school to educate the students from all of the towns. Arms Academy, Charlemont High School, and Sanderson Academy (and Whitingham

High School in Vermont which accepted students from the northern part of Heath), were the only options available in the nearby vicinity. Increases in student population and the advanced age of existing school buildings led to the decision to create the RSDPB to explore collaborative approaches. The RSDPB resulted in the creation of the 7-12 Mohawk Trail Regional School District (MTRSD) on April 30, 1956.

The Mohawk Trail Regional School District was formed to build a 7-12 high school for the towns. Although all of the towns were committed to building a regional 7-12 high school, the process was slowed over disagreements during the planning process. Disagreements among the towns could be seen in the Shelburne Special Town Meeting in February 1957 in which a bond authorization was rejected. Plainfield, Cummington, and Ashfield expressed interest in joining the MTRSD in late 1957, but the district planning problems were growing. Shelburne and Buckland voted to leave the district in February 1958. While it was reported that the four remaining towns wanted to continue plans for a 7-12 regional high school, petitions to end the district were circulated through the four towns in the spring of 1958 and accrued signatures from more than 10% of the registered voters. Over the course of the next two years, all of the remaining towns eventually voted to amend the Regional Agreement to dissolve the district. Building a 7-12 regional high school was the goal of this first iteration of the MTRSD, but disagreements between the towns prevented progress toward that goal. As a result, the first MTRSD was officially dissolved in February of 1961.

The population of school aged children continued to expand in the early 1960s creating overcrowding in most of the small towns in Franklin County (Ashfield School History). The Commonwealth of Massachusetts, in an attempt to address the burgeoning school population in a systematic way and take advantage of economies of scale, issued mandates promoting regionalization and a goal of districts having high schools with 400 students and elementary school districts of 1,200. Most of the Hilltowns were looking for options and the Hilltown Regional Committee was formed around 1963.

Second MTRSD 1964.

Ashfield, Plainfield, and Rowe joined the original six towns to form a new 7-12 MTRSD in 1964 with the goal of collaborating on the construction of a 7-12 high school. The school committee appropriated \$175,000 for architectural plans, land purchase, legal fees, and land preparation in February of 1965. Original projections for the MTRHS estimated an enrollment of 876 students in grades 7-12. The Mohawk Trail Regional High School opened its doors on September 12, 1967 with an enrollment of 917 students.

While the MTRS satisfied state mandates for grades 7-12, the organization of the elementary schools required further regionalization. After the formation of the MTRSD, the 9 towns formed several elementary districts in an attempt to comply with state mandates. The Buckland-Colrain-Shelburne (BCS) Regional School District was formed in the 1960s to provide grades 1-6 education. The Ashfield-Plainfield Regional School District was dissolved and the towns joined Heath and Rowe to form Union 65 in 1970 and the Hawlemont Regional School District continued to serve the students of Hawey and Charlemont. The elementary districts resisted the Commonwealth's encouragement to form a larger district and instead insisted on maintaining separate school committees. In his 1970 report to the town, Superintendent Arthur Silvester said, "The educational structure in our nine towns is probably the most complicated school organization in the Commonwealth. It physically reaches into two counties, with rugged terrain and complex transportation problems."

Information on the MTRSD from newspapers and other sources from the 1970s and 1980s has not been digitized and can only be accessed using microfiche. Therefore this history includes only a few references to that period. The formation of a grades 5-8 Middle School model was reported in 1979. The model featured a new approach to the teaching of that age group and was intended to facilitate communication and program consistency between MTRS and the feeder schools.

The 1980s articles featured some realignment within the district. Rowe withdrew from the Mohawk Trail Regional School District in 1982. Rowe voluntarily withdrew because of changes to the town's property assessments which would have adversely affected state aid to the MTRSD. Rowe withdrew with the understanding that MTRSD would accept grades 7-12 students. Ashfield and Plainfield exited Union 65 in June of 1986 when the Commonwealth approved the formation of the Ashfield-Plainfield Regional School District.

Long-Range Planning, 1986.

Overcrowding was reported as an issue for the district in the mid 1980s. In 1986, Bruce Willard, the superintendent since 1978, formed a long-range planning committee with representatives from all of the districts involved with the MTRSD. The [1986 Ashfield Annual Report](#) recorded the priorities of the committee:

1. Should each school district attempt to resolve space needs by initiating building programs, or should consideration be given to a building project on a regional basis? A building project at Mohawk Trail Regional High School could be expanded to include grades five and six in the middle school. This could alleviate some of the space needs in all elementary schools.
2. How many building projects will the state fund?
3. The concept of kindergarten through twelve regionalization needs to be seriously examined. The Department of Education has recommended that in view of the various space and building needs facing the nine towns, consideration be given to the creation of a single school district for the eight towns included in the high school district. Rowe would likely continue the current practice of operating as a separate K-12 school district. The advantages and disadvantages of a fully regionalized school district have to be studied carefully to assess the educational and financial impact of such a move. Any changes in the existing regional school agreements would require the approval of all communities.

The planning committee embraced K-12 Regionalization as a major focus for the district, and elementary school building projects were chosen as the way to alleviate overcrowding.

The Commonwealth also encouraged K-12 regionalization because of the building needs throughout the nine towns. The superintendent, too, tried to encourage regionalization. In his 1991 report, Bruce Willard described the situation, "At the present time there are six separate school committees with 44 school committee members... There are separate budgets, teacher contracts, and methods of operation for all school committees. The present methods of operation cause considerable duplication of effort on the part of the school committees, the superintendent, and other members of the Central Office staff."

The process of K-12 Regionalization in the MTRSD was the topic of Bruce Willard's 1993 Doctoral Dissertation, [School Regionalization In Massachusetts : An Assessment Of Voter Attitudes In Eight Western Massachusetts Rural Communities Concerning School Regionalization](#). The dissertation examined some of the questions surrounding the decision making process involved in forming a K-12 regional school district including the attitudes of voters in communities considering the question of regionalization in areas such as curriculum, management, financial impact, and local control of the educational process. His conclusions were:

- Financial considerations, and especially the level of state aid to a K-12 region, would play a major role in any decision by voters to form a K-12 region.
- Concerns about the loss of local control play an important role.

- Curriculum coordination and the development of a common curriculum among the elementary schools was important for the successful integration of all students into the high school.
- District management would reduce duplication and allow the superintendent to spend more time on educational policy matters.

The K-12 regionalization initiative required an amended regional agreement but this became a sticking point between the towns; voters in member towns rejected it four times and it was only when the state legislature passed [Chapter 371 of the acts of 1993](#) that all of the towns voted in favor of the amendment. The amendment contained a requirement that any change in the Regional Agreement must be supported by a unanimous vote of all member towns, each town having one vote. This requirement was necessary for the passage, but it became an impediment to change when the enrollment started to decline precipitously after 2000.

The eight towns supported the K-12 regionalization effort after the Regional Agreement was amended in July of 1993. Special legislation was required to complete the process due to the novel configuration of the regional district which enabled the Hawlemont Regional School District to be a member of the Mohawk Trail Regional School district for grades 7-12, while maintaining their grades K-6 regional district. Chapter 371 of the Acts of 1993 codified this configuration. The legislation also dissolved the Ashfield-Plainfield Elementary Regional School District, the Buckland-Colrain-Shelburne Regional School District and Union 65, and codified the rights of the town of Rowe as per the Mohawk Trail regional school district agreement in effect prior to this act.

With the K-12 regionalization effort completed the district embarked on building projects. Two new buildings and three renovations were completed during the 1990s according to the [Massachusetts School Building Authority](#) (MSBA). The district's two new building projects were Heath Elementary School, which opened in 1996, and a new Sanderson Academy, which opened in 1997. The renovation projects were Colrain Central School in 1996, Buckland-Shelburne Elementary School in 1998, and Mohawk Trail Regional High School in 1998.

The preceding history of the MTRSD details the efforts of the member towns to provide a high-quality education. Throughout the 1990s the towns invested in capital projects and supported complex reorganization efforts designed to increase the efficiency of the education system. These significant investments in money and time put the district in an excellent position to provide education for an expanding population. Unfortunately, a demographic change became evident in the 2000s.

Interim Planning, 2006

The enrollment data on the Massachusetts Department of Education School Profiles show an increase in the K-12 enrollment of Hawlemont RSD and Mohawk Trail RSD enrollment between 1995 (1,772) until 1997 (1,971) when the enrollment reached its highest point. Thereafter the enrollment steadily declined. The decline in enrollment became a focus of the district in 2006 because state aid stopped growing while expenses did not. From 2004 to 2005 the amount "above minimum" that Mohawk towns were asked to fund grew from \$195,692 to \$1,191,854. . The MTRSD School Committee authorized an Interim Planning Process in July of 2006. The process was coordinated by Superintendent Michael A. Buoniconti.

The Interim Planning Process was charged with developing a focused plan to best meet the educational needs of the financially strapped school district, maintaining as much programming as possible while reducing operating expenses . The effort was organized as follows:

- Interim Planning Committee – Comprised of three representatives from each subcommittee
- Four Subcommittees
 - Education
 - Budget
 - Transportation
 - Building Use
- Steering Committee
 - Facilitated process
 - Included two community members and Superintendent

The five month process began with a brainstorming session on July 26, 2006. Thereafter, each subcommittee met between 5-10 times. Preliminary reports were made in September and final reports were submitted to the Steering Committee in December. The full Interim Planning Committee met seven times during the process. Final deliberations were completed on December 11, 2006 and a final report was delivered to the superintendent on December 28, 2006. A [public presentation](#) was made to the School Committee on January 3, 2007.

The presentation began by making the following points about the status of the district:

- The district had a capacity of 2,050 students including 140 at Heath, 210 at Colrain, 240 at Sanderson, 460 at Buckland Shelburne, and 1,000 at Mohawk.
- Enrollment declines from 2002 to 2007 were 355 students or -22%.
- Projected decline of additional 201 bringing the total enrollment to 1,046 by 2012.
- The District Budget was projected to increase 1 million dollars per year while state aid was projected to increase by only \$250,000 per year- thereby shifting the financial burden from state to town to approximately \$750,000 per year.
- Financial unsustainability was projected to continue.

The facts presented by the Interim Planning Committee were not contested, but there was a division on how to address those facts that resulted in two reports; a [Majority Report](#) and a Minority Report. The Majority Report represented the opinions of 11 of the 12 members of the Interim Planning Committee members. The Minority Report represented the views of one member.

The January 3, 2007 presentation listed three key recommendations from the Majority Report and four key assertions from the Minority Report.

The Majority Report presented three key recommendations:

- Create a regional elementary school by combining four elementaries into one at BSE over three years.
- Simultaneously pursue lobbying efforts to increase state funding and thus more permanent solutions.
- Focus on shaping the new regional elementary into a highly desirable school.

The Minority Report made four key assertions

- Consolidation will not provide the hoped for savings to improve elementary education in our district and will instead result in deterioration of its quality.
- Consolidation will not solve our financial crisis and offers only temporary postponement.

- This temporary postponement requires radical and permanent changes to our regional agreement and the structure of our district.
- Pursuing this plan is a distraction and waste of precious and limited human resources needed to address the real source of our financial problems, the state's failure to fairly fund public education.

The January 3, 2007 Interim Planning Presentation continued to be a school committee topic for the rest of the school year in the form of Superintendent updates, but in terms of school committee votes there were only three directly related to the recommendations. At the January 24, 2007 meeting the school committee voted to form a Consolidation Task Force and voted to form a Legislative-Lobbying Task Force. The May 16, 2007 agenda showed a vote on Reauthorization of Consolidation, but the Consolidation Task Force did not enjoy the same level of support as the Legislative-Lobbying Task Force; there were no subcommittee reports listed in any subsequent agendas. There was mention in the Superintendent updates, which continued until August after which consolidation ceased to be a topic.

The Legislative-Lobbying Task Force, a recommendation of both the Majority and Minority reports, took root in the school committee. A Subcommittee Report on Long Range Planning/Legislative Updates was a feature of every agenda from 2007 through 2009; but it too ceased being an item on School Committee agendas in January 2010. After that, the priorities of the Interim Planning Process were no longer a topic of school committee reports or votes, but the issues that had prompted the formation of the Interim Planning Committee had not gone away. The student enrollment continued to decrease, there continued to be budget shortfalls which resulted in difficult staffing decisions, and school budget increases were an increasing burden on the towns.

Examining the School Facilities, Potomac, 2012.

The regular maintenance of the existing school buildings prompted the School Committee to solicit Requests for Proposals for District Building Condition Assessment for all buildings at the September 2012 meeting. This information, a practice of due diligence, was considered necessary for budget preparation. Potomac Capital Advisors was awarded the contract at the November 14, 2012 meeting and they proceeded to perform assessments of Colrain Central Elementary School, Buckland Shelburne Elementary School, Mohawk Trail Middle and High School, and Sanderson Academy; Heath Elementary was not included in the assessment.

The reports were distributed and discussed at the June 12, 2013 meeting. Each report included a section titled: Opinion of Probable Cost. The section listed recommended repairs to address observed physical deficiencies, along with general scope and preliminary budget cost estimates for these repairs. The estimates addressed components or systems exhibiting patent or significant deferred maintenance requiring major repairs or replacement. The reports broke out the estimated costs for each building based on the following categories: Site Features at Grade, Roofing, Exterior Walls, Structural Systems, Interior Finishes, Specialties, HVAC, Plumbing, Fire Protection, Electrical, Telephone & Security, Lighting, and Fire Alarm. The total estimate for Sanderson was \$690,125. Estimate for Mohawk Trail \$2,000,127. The total estimate for Colrain was \$498,070. The total estimate for Buckland Shelburne was \$1,528,960. These reports were used by the Budget Subcommittee to inform their work.

Potomac Report Links:

- [Sanderson Academy](#)
- [Mohawk Trail](#)
- [Colrain Central](#)

- [Buckland Shelburne](#)

Long-Range Planning, 2013.

The issues of declining enrollment and rising costs combined with the estimated costs of building maintenance complicated the 2014 budget process. The School Committee decided to initiate the formation of a second study group to find a sustainable path forward. The committee recognized the need for ownership among the towns so they asked the Select Boards from each member town and the Town of Rowe to appoint representatives to this committee. These appointed stakeholders were charged with studying the issues at hand, determining sustainable solutions, and making recommendations to the District's School Committee that best represent the interests of their respective towns. On March 13, 2013 the MTRSD School Committee voted to ask the member towns to form a Long Range Planning Committee (LRPC).

All of the member towns identified participants and the first meeting was held on June 6, 2013. During subsequent meetings the LRPC developed a mission statement: *Mohawk District member towns partnering to explore and communicate to stakeholders the options for a financially sustainable, quality public education for the next 20 years.* The LRPC met regularly over the next 18 months and provided the School Committee with minutes of their meetings. The committee carefully reviewed the 2007 report and then focused their research on transportation, enrollment, educational performance, demographics, unfunded mandates, building design, operational issues, expense evaluation, and debt. They collected data about MTRSD and other schools in the Commonwealth from the Massachusetts Department of Elementary and Secondary Education (DESE) and the Massachusetts Department of Revenue, Division of Local Sustainable Schools. They considered the findings of a 2009 report from the New England School Development Council entitled "[Franklin County Schools: A 2020 Vision.](#)" They also compiled demographic data from the United States Census, Town Clerks in the eight MTRSD member towns, and the Donahue Institute at the University of Massachusetts Amherst. The Superintendent's office also provided data sets on request.

The work of the committee resulted in a white paper entitled [Sustainable Schools: Recommendations for the Mohawk Trail Regional School District](#) which was [presented](#) at the January 21, 2015 School Committee meeting. The meeting was attended by selectboard and finance committee members from member towns as well as Stephen Kulik, 1st Franklin State Representative and Paul Mark 2nd Berkshire State Representative indicating the importance of the event.

The paper started with a nuanced definition of sustainability, one that took into account the social, economic, and educational. Social components included the place of a school within a community, the demographics of the area, enrollment and school choice out of the district, community support, and the 1993 Regional Agreement that defines the relationship between the member towns. The economic components included the school buildings, financial support from the towns, financial support from the state, and transportation. The educational components included the need to hire and retain qualified teachers, mentor them, and ensure their ongoing professional and intellectual development, as well as develop a culture that promotes inquiry, mutual respect, and success among students and staff.

The White Paper presented eight categories of recommendations:

1. Share School Buildings
2. Produce Alternative Energy for Heating, Electricity, and Revenue Generation (Potential 30-year Savings for Mohawk, Buckland-Shelburne, and Colrain schools alone is \$5.3 Million)
3. Pursue Full Reimbursement of Regional Transportation Costs from the State

4. Conduct Student Exit Surveys
5. Advocate for Incorporating a “Rurality” Factor in Chapter 70 State Aid Formula
6. Enhance On-The-Ground Familiarity of School Committee Members with the District’s Operations
7. Support the Drive for High-Speed Internet Access
8. Proposed Changes to the Regional Agreement
 - a. Section XIV – Amendments: Allow amendments to be made by majority vote, with two exceptions: 1. No school could be closed without the consent of the town or towns served by that school. 2. No students could be sent to an elementary school other than the one currently serving their town without the consent of the town.
 - b. Section IIIB - Pupils Entitled to Attend the Regional Elementary Schools: Allow towns, if they so choose, to send some or all of their elementary students to a school in another town or to enter into other agreements for sharing students, teachers, and administrators with a neighboring town or towns that may or may not involve closing a school completely.
 - c. Section IIIE - Vocational and Trade School Pupils: Clarify the vocational education responsibilities of the MTRSD Central Office and School Committee.
 - d. Section II – Type of Regional District: Pre-K District-Wide Uniformity: Provide PreK for all three and four year olds in a consistent manner across the district.
 - e. Section X – Local Education Councils: Each school to be more visible with the activities of their respective Local Education Councils.

The LRPC White Paper presented the opinion that there is a strong sense of place attached to the local schools. It described the schools as follows: “In addition to being institutions where our children learn, these facilities serve other vital functions in our communities. They are gathering places where community members attend meetings, concerts, plays, and sporting events. They also are places where local residents go to work each day, making the District a significant employer in the region.” Nevertheless, school closure also became a topic of discussion at the February 23, 2015 school committee meeting.

Changes to the Regional Agreement remained an important topic because many of the LRPC recommendations required changes in the language, and the [10-26-15 meeting](#) included a compilation of proposed changes: The included a compilation of proposed changes:

1. Elimination of outdated language which also includes the language changes required by DESE, and the addition of Pre-K to the District.
2. Language to allow for approval of amendments to the Agreement by a 2/3 supermajority of District towns, rather than requiring unanimous consent, except in the case of closing of a school.
3. Addition of a separate Article specifically outlining the procedure for school closing that would require approval of the town(s) whose school would be closed.
4. Re-admit the Town of Rowe to the District at the 7-12 grades level. There also was discussion about whether approval of Rowe’s re-admission should be made contingent upon passage of number 2, above.

The January 21, 2015 LRPC presentation provided the school committee with concrete examples of ways to support the long-term sustainability of the district. The school committee met five times in February to work on implementing some of the recommendations of the LPRC. The implementation of recommendations over the subsequent years met varying degrees of success.

1. Sharing space in school buildings did not work out as hoped. District buildings were eventually used by a few community groups such as the Mary Lyon Foundation and the Greenfield YMCA at no cost. The concept of having multi-use school buildings which served schooling and other purposes did not come to fruition.
2. Switching to alternative energy sources for heating and electricity was eventually completed. Sanderson Academy and Hawlemont have converted to wood pellets at a substantial annual savings over oil heat. In 2022-23, MTRSD negotiated an agreement to install solar panels on the roof of MTRS which would generate enough electricity to meet about 75% of MTRS' needs at a significantly reduced cost per kilowatt hour, with installation at no cost to the District. The system was completed in August 2023, but not activated by the utility until April 2024.
3. Pursuing full state reimbursement of regional transportation costs is an ongoing initiative for MTRSD and all other regional districts in Massachusetts.
4. Conducting, analyzing, and developing student retention action plans based on student exit surveys is an ongoing process which has helped to increase understanding of why some MTRSD families exercise the school choice option to leave the district schools. As part of the current Phase II study, this will be a focus of community outreach efforts.
5. Advocating for incorporation of a "Rurality" Factor in the Chapter 70 state aid formula has been an ongoing process. The district has been proactive in regard to advocacy, but limited growth in Chapter 70 funding for rural school districts continues to be a significant challenge faced by all rural districts in Massachusetts despite the 2022 Special Commission on Rural School Districts report.
6. Enhance On-The-Ground Familiarity of School Committee Members with the District's Operations – The suggested actions have from time to time been pursued but, for a variety of reasons, a sustained effort to have SC members regularly in schools has not been made.
7. Support the drive for High-Speed Internet Access – MTRSD was and remains an active partner in this effort. With the advent of COVID, the District and its IT contractor took multiple steps to identify families without internet access and provide some sort of access (e.g., creating "hot spots"; boosting the capabilities of school-based internet). During COVID, all students were provided access to Chromebooks for use in remote learning; today, all grade 8-12 students are provided with their own Chromebooks, while Chromebook carts provide in-class access for grades K-7.
8. Revising the Regional Agreement – Suggested revisions included:
 - a. Section XI – Amendments was included on town warrants in 2016 and failed.
 - b. Adding Pre-K was eventually approved by the towns in 2016.
 - c. Clarifying the District's role in working with towns that are not part of any vocational district was clarified in a 2018 amendment.

The BEST Committee, 2016.

The need for a sustainable path for the district continued. The [February 10, 2016](#) school committee meeting minutes contain the first reference to a Strategic Planning Steering Committee. The group was envisioned as a 14 member group charged with developing a sustainable model for the district. The Strategic Planning Steering Committee became the Building, Education, Sustainability and Trust (BEST) committee at the 3-9-16 meeting. The BEST committee started meeting regularly and shared minutes with the school committee. The BEST committee formed subcommittees focused on communication, curriculum, and facilities and finance, transportation, and fundraising as first described at the [4-13-16 SC](#) meeting and later at the [6-8-16 meeting](#). The Communications Subcommittee was focused on informing the

towns of the strategic plan. They planned to use school flyers, the Shelburne Falls & West County Independent newspaper, school Facebook pages, public forums, and surveys to establish two-way communications with town residents.

The BEST committee continued to work throughout the rest of 2016. It announced that it was considering six consolidation options at the [6-8-16 meeting](#). The BEST recommendations were previewed at the [11-28-16 meeting](#) with a planned formal report to take place in January 2017. The [formal \(BEST\) report](#) was presented at the 1-18-17 meeting with a plan to have the school committee vote to accept the report. There was discussion about whether or not the vote would be on approval and it was resolved that the report would be accepted with gratitude. The final report presented the following recommendations:

- Phase 1 (to be accomplished in time for September 2017) – Work cooperatively with the Heath Education Task Force to implement a strategy for the education of all Heath students (PK - 6) that allows for the closing of Heath Elementary School and the return of that facility to the Town of Heath for re-use.
- Phase 2 (to be accomplished in time for September 2018) – Expand the Mohawk Middle School to include all 6th grade students on the Mohawk campus.
- Phase 3 (to be accomplished in time for September 2019) – Collaborate with member towns to redistrict and consolidate elementary students (grades PK to 5) into two schools, creating two new learning communities at the current Buckland Shelburne Elementary and Sanderson Academy sites.
- No later than December 31, 2017 – Complete an in-depth analysis of the financial feasibility of constructing a new elementary school (or addition) on the Mohawk campus to maximize the operational efficiencies and educational advantages inherent in having all resources in a single location.

The implementation of Phase 1 of the BEST became a topic of meetings. The School Committee appointed a subcommittee to negotiate with the Town of Heath (a Heath Ad Hoc Committee) regarding a potential closure. The two groups met weekly from January through April 2017 and, ultimately, agreed to propose Regional Agreement amendments that would:

1. Close the Heath School as of the end of the 2016-2017 school year.
2. Provide the Town of Heath with payments totalling \$240,000 over three years to offset the costs of minimal operation of the school building (owned by Heath) as the town decided its ultimate disposition.
3. Accommodate Heath's interest in becoming a member of the Hawlemont Regional District for grades PK-6 by executing a tuition agreement with the Hawlemont District that would allow Heath elementary students to attend Hawlemont as negotiations between Heath and Hawlemont proceeded. (The tuition agreement had an initial term of three years and was twice extended for additional one-year terms.)

These amendments were approved by the MTRSD school committee in April of 2017 and ratified by the towns at 2017 annual town meetings. The children of Heath attended Hawlemont starting in September 2017. The Heath Regionalization Study Team (HRST) met regularly. However, these discussions broke down and on September 9, 2021 the Heath Regionalization Study Team voted to suspend most aspects of the study and end the effort of Heath to join Hawlemont. In 2022, amendments to the regional agreement assigning Heath students to Colrain Central School were passed by all towns. Many Heath students continued to attend Hawlemont as “choice” students, while others “chose” to attend Rowe Elementary and others attended Colrain Central.

Phase 2 and Phase 3 of the BEST recommendations were discussed at the August 21, 2017 meeting. It was agreed that the first part (Phase 2 of the BEST plan) would focus on the steps necessary for moving the 6th grade students to Mohawk. Because of the time needed to have a Regional Agreement amendment ready to come before the towns, the time necessary for the District to communicate the rationale and plans for implementation to students, parents, and community members, and the time needed for all the schools to fully prepare for this change, this process would take at least two years. Thus a decision by December, 2017 would be necessary to implement the change by September, 2019. Phase 3 was also deferred until at least 2019 because of two reasons. First, the committee wanted a careful study of enrollment data, feasibility, and financial savings. Second, the agreement with Heath provided a three-year trial with Hawlemont, with Colrain school as a potential fallback option in the event the arrangement with

The proposal to move the 6th grade students to MTRS was presented to the voters at the 2018 annual town meetings; however the first town to review the amendments voted not to approve, thus making other votes unnecessary. The 6th Grade move to MTRS amendment did not pass in any of the towns. The last mention of the BEST Report in school committee minutes was at the May 21, 2018 meeting:

“While the proposed plan, based on BEST recommendations to fully integrate the 6th grade into MTRS Middle School by Fall of 2019, did not meet with the approval of town voters, the overall process was sound and thorough.”

Phase I Study, 2022.

Superintendent Stanton, who assumed the role on July 1, 2020, wrote a Community Compact Grant for \$100,000 in February 2022 to study the current MTRSD model and offer suggestions of sustainability. As the district waited to hear about the Community Compact Grant, in June the school committee accepted the sustainability Committee’s vote to approve an anonymous \$100,000 donation (via Mary Lyon Foundation) for an MTRSD Sustainability Study. On August 10th, the study was awarded to the Massachusetts Association of Regional School Districts (MARS). The MARS team was composed of former superintendents and educators. The MARS representatives gave a progress report at the October 12, 2022 school committee meetings and described their process as including an analysis of educational programming, enrollment, financials, and a survey of the community. A final report was projected for April of 2023 and was to include recommendations for further actions. The various MARS reports as part of Phase I can be found on the 2districts8towns.org website under RESOURCES, link directly [HERE](#).

The MARS report reported the following conclusions in regard to the following components:

- **Enrollment:** New England School Development Council (NESDEC) completed an enrollment study for the Mohawk Trail District and noted the 7-9% population decreases in the member towns over the past 30 years. The report broke the projected enrollments for each school over the next 10 years. The report projects that the Buckland Shelburne Elementary School enrollment will decrease by 63 students, the Colrain Center Elementary School will decrease by 4 students, the Sanderson Academy will decrease by 12 students, and the Mohawk Trail Regional High School will increase by 9 students. The report concludes, “While the District has experienced drastic declines in enrollment in previous years, the NESDEC reports indicate that Mohawk Trail will remain a small district with only minor changes in enrollment going forward.”
- **Facilities:** All of the schools were described as clean and well maintained and at one point or another, have been updated through projects completed with the help of state grants. The report qualified that statement with the observation that the Buckland-Shelburne School is the oldest facility in the District and that if the District

chooses to maintain this school for the children of Buckland and Shelburne, there may be a need within the next decade to update and modernize this building. The report went on to recommend the consideration of three facilities options: 1) Move the 6th grades to MTRS (consistent with BEST report), 2) Consider the closure of Colrain Central, 3A) Consider the closure or rebuilding of BSE or 3B) Closure of Colrain and BSE and consolidation of PreK-5 students at the MTRS (consistent with the BEST report).

- The Abrahams Group conducted an analysis and concluded that Local Required Contributions were projected to increase four years into the future ranging from 17% to 10%. Hawley and Charlemont Required Contributions will change minimally. Given enrollment patterns, the District will remain a Minimum Aid District through the projection period. If District expenditures remain constant (as the model has assumed), increases in “Above Minimum” contributions will be necessary, leading to challenges for member towns approaching their levy limits.
- **Educational Programs:** MARS consultants interviewed multiple staff members and surveyed the community to obtain input and perspectives on current educational programs in order to gain a sense of how these programs blend with the concept of district sustainability. Interviewees reported that the district has been proactive in implementing initiatives to improve student opportunity. They also reported that student performances on standardized assessments, while comparable to some neighboring districts, were not what they would like to see. Results over time are fair to average. Most of those interviewed feel that the District needs to push for higher expectations for all students. Another key finding was about the loss of students at the Grade 6 to 7 and Grade 8 to 9 transitions. The following solutions emerged from the interviews:
 - Addressing the attitude that other schools are better places for students.
 - Building relationships between the Middle/High School and K – 6 students and families is at the heart of retaining students.
 - Reconsideration of moving Grade 6 to the middle school.
 - More and continued focus on creative programs (advisory, internships, dual college credit coursework and relationships with the community college).
 - Getting the Middle and High School on the same schedule was seen as important.
 - Consideration could be given to do fewer things with excellence as opposed to trying to “do it all” at the High School. Can a high school of fewer than 200 students really be “comprehensive”?
- **Special Education Programming:** The conclusions of this study were:
 - Geographically, the distance between schools within Mohawk Regional varies to a point where staff travel can result in a considerable amount of time between sites. Consolidation of elementary school sites should be discussed as an option moving forward. Travel between schools displaces service hours and limits some of the group work that can be done with students that have like abilities.
 - Build internal capacity to avoid the over usage of paraprofessionals. A district of approximately 800 students that relies on more than 60 paraprofessionals is relying on the least qualified staff to work with the students with the highest needs. An option would be to consider increasing special education teachers in the inclusion model by collapsing some of the paraprofessional positions.
 - Scheduling and grouping should be done at this time for the following year. This should be a yearly practice to group students together who have similar disabilities and to balance placement in inclusion supported general education classrooms with special education teacher support.
 - Are there options to work with neighboring districts to combine high level support services? An option to regionalize some efforts by combining significantly separate classrooms between districts may be a way to share financial support and work with larger numbers of students.
 - Another primary option of this report would be to focus on the adoption of an expanded K-12 SEL program. The five tenets of CASEL have been formally recognized in schools since the early 1990s, but

the research into SEL as a formal focus started back in the late 1960s. Investing in a student model that promotes responsible decision-making, social awareness, relationship skills, self-awareness and self-management will aid students to self-regulate their behaviors and interact more effectively within the curriculum.

Summary, Section II.

The preceding history of the MTRSD can be divided into two periods. The first period, 1956-2006, was a time of growth in enrollment, building projects and new construction, and the development of a PreK-12 regional district. The towns met the challenges posed by these changes. The second period, 2007 to the present, is a period of significant contraction of enrollment and unsustainable increases in the cost of maintaining the PreK-12 district. School committee members, school employees, and town residents have devoted a great deal of time and effort to studying and documenting the issues, proposing solutions, and working to build consensus among the taxpayers on how to proceed.

Legislative lobbying has repeatedly emerged as a recommendation to deal with the contraction facing the MTRSD. Legislative lobbying is a low-cost option accepted by all parties since the 2007 study. The recurring initiatives have been effective in increasing the awareness of the problems facing the MTRSD at the state level. Unfortunately, the state has been slow to act. The Student Opportunity Act of 2019 failed to address the specific needs of rural districts and subsequent legislation has not gained traction in the legislature. Rural Schools Advocacy in Massachusetts is working diligently to encourage the legislature to address the deep inequities and challenges faced by rural schools, but the website observes that a long term plan is yet to form.

Over the years, the study groups have proposed district-based options to deal with the contraction but they have run into opposition. As far back as 1986 there was a proposal to move grades 5 and 6 to the high school to free up more space in the elementary schools, but this proposal was abandoned in favor of the formation of a PreK-12 district. The 2007 Interim Planning Committee Majority Report proposed a grades PreK-5 regional elementary school but the proposal was rejected by Minority Report and the concept of consolidation ceased to be a topic of school committee consideration in less than 6 months. The 2015 LRPC did not propose a consolidation but the successor BEST report proposed moving the 6th grade to the MTRS, which was rejected by all of the towns at the 2016 town meetings. Thereafter, the BEST recommendations were abandoned with the exception of the closure of Heath Elementary. The 2023 MARS study has again recommended the relocation of 6th grade to the MTRS and has encouraged the consideration of the closure of Colrain and BSE and the consolidation of PreK-5 students at the MTRS.

It is doubtful that legislative lobbying will yield substantive results that will address the issues facing the MTRSD over the next 5 years. Multiple studies have recommended reconfiguration of the district. It is time to give careful consideration of those proposals and to develop a strategy that will build support for the changes throughout the towns.

SECTION III: TAKING STOCK AND THE STATEWIDE CONTEXT OF REGIONALIZATION AND COLLABORATION

Regional Districts in Massachusetts, a Summary of Historical/Recent Efforts

The passage of Chapter 71 14B in 1949 was followed by the formation of 39 regional school districts during the 1950s, but then the pace slowed. The 1960s saw the formation of 11 new regional school districts and only 7 new districts have been formed since 1970. The most recent listing of Academic Regional School Districts (2020) on the Department of Elementary and Secondary Education website shows, of the 58 extant regional school districts, six revisited their regionalization agreement to modify their districts after the initial formation:

- Dighton-Rehoboth, established in 1957, modified the regional agreement between the two towns in 1987.
- Freetown-Lakeville, also established in 1957, modified the regional agreement between the two towns in 2011.
- Southwick-Tolland, established in 1988, added the town of Granville in 2012.
- Berlin-Boylston, established in 1959, modified the district between the two towns in 2013.
- Mount Greylock, established in 1958, modified the regional agreement between Lanesborough and Williamstown in 2018.
- Warwick withdrew from the Pioneer Regional School District in 2024.

While several studies are ongoing, new regional district formation has all but ceased despite the state and local interest in consolidation. Despite all of the state funds, studies, and reports made available to towns and districts in Massachusetts, only three new districts have been formed over the past fifteen years: Ayer-Shirley (2011), Somerset-Berkley (2011), and Monomoy (2012).

Massachusetts General Laws also allow school committees of two or more towns to join together to form a union school committee. The organization of the union school committee is governed by statute, as are its powers, which are limited to the authority to employ a superintendent of schools, school physicians, school nurses, clerical and secretarial personnel, special teachers, and supervisors. There are currently 15 superintendency unions in Massachusetts, comprising 48 member towns, including the Northern Berkshire School Union, of which Rowe is a member

Another legal framework for collaboration between districts was passed into law in 1974. The Massachusetts legislature passed MGL Chapter 40, Section 4e in 1974 which enabled the formation of educational collaboratives. Massachusetts collaboratives are educational services agencies (ESA) that bring school districts together to form partnerships to create regional educational capacity and resources. Collaboratives are designed to benefit school districts, students, families, educators and taxpayers by maximizing efficiency through shared costs and expertise. There are currently 25 education collaboratives in Massachusetts, most of which are located in the eastern part of the state. There are only two collaboratives west of Worcester, one is the Collaborative for Educational Services (CES) located in Northampton and the other is the Lower Pioneer Valley Educational Collaborative (LPVEC) located in West Springfield. There are no collaboratives currently operating in Berkshire County.

The dearth of successful regionalization efforts has prompted numerous studies across the commonwealth to identify ways for districts to collaborate. Those studies will be reviewed in the following paragraphs, and links to the full reports are embedded or noted in each summary.

Creating a Sustainable and Quality Education System in Franklin County Public Schools (Public Management Associates, 2008)

The MTRSD Interim Planning Process that began in 2006 did not take place in a vacuum. Greenfield Community College, on behalf of Franklin County school districts, put out an RFP in November of 2007 to study potential areas where school districts could cooperate to create a more cost effective delivery of present and future educational programs and services. This was intended to be Phase I of a 2007-2009 research initiative. This initiative was prompted by a variety of factors including loss of students to out of district placements, high costs of school transportation, high cost of special programs, declining enrollment, and a long list of efficiencies unavailable to the small districts in the county.

The study began with an argument for the benefits of small learning communities. It then proceeded to explain how a comprehensive education collaborative could provide economies of scale that would enable the small learning communities to flourish. The study provided a detailed roadmap toward the realization of a new county-wide Franklin County Education Collaborative (FCEC) under the umbrella of the Franklin Regional Council of Governments (FRCOG).

The essential recommendations were:

1. Establish a new county-wide Franklin County Educational Collaborative (FCEC)
2. Organize the FCEC under the umbrella of the Franklin Regional Council of Governments (FRCOG)

These were 4 other recommendations that consisted of guidance on how to accomplish the essential recommendations. While the recommendations of this study were not implemented the research provided the basis for the next Phase of the initiative.

Link to study, [HERE](#).

The Effectiveness, Value, and Importance of Small School Districts (Driscoll Et al. 2008)

Driscoll collaborated with the Massachusetts Association of School Superintendents' Small and Rural School District Task Force to write this study. It was composed, in part, as a counterpoint to the political current, presented in the contemporaneous studies, to consolidate small school districts as a means of addressing fiscal constraints in educational spending in Massachusetts. The paper focused on economic efficiency as well as student learning outcomes in small school districts (2000 students or less) in Massachusetts.

This paper reviewed a range of research studies in Massachusetts and across the United States came to several conclusions. First, an analysis of small school district data (student enrollments of 2000 total or less) in Massachusetts indicated that small districts are successful in the education of their students across many domains such as graduation rate, attendance rate, and enrollment in college after graduation. Second, consolidation, particularly legislatively mandated consolidation, does not appear to be supported by the literature reviewed and can be at cross purposes with what we have learned about the effectiveness of small districts. Third, the paper cited several studies conducted over the last 50 years, as documented by the Rural School and Community Trust (Rural School and Community Trust, 2003), that there has been no indication that consolidation results in any significant savings over time.

Recommendations of this paper included increasing participation in education collaboratives, voluntary inter-local compacts, and increased use of technology to facilitate teaching and learning and collaboration. The paper also argued that the state needs to revise the Chapter 70 formula to create an updated foundation formula to adequately support school districts of all sizes.

Link to study, [HERE](#).

Franklin County Schools: A 2020 Vision (NESDEC, 2009)

In 2008, the Greenfield Community College once again invited Phase II proposals to assist Franklin County educational and community leaders identify strategies that might lead to more effective planning that could lead to, “synergies, efficiencies, and cost saving such as: technology, distance learning, collaborative and cooperative arrangements, public school/higher education partnerships and possible regional education models.”

The contract was awarded to New England School Development Council (NESDEC). The NESDEC team was led by Joseph M. Cronin who had been the first Massachusetts Secretary of Education. The team used the earlier work conducted by Public Management Associates as a foundation. They then conducted further analysis of demographic, financial, and education data across Franklin County. The NESDEC study utilized surveys and interviews to garner citizen and educator input.

The NESDEC study recommended the careful consideration of three options for improving and sustaining the education infrastructure of Franklin County:

- **Option 1:** A Franklin County Unified School District which would replace the nine superintendents and 20 school committees with a single Franklin County School Committee, one superintendent, one deputy for teaching and learning, and one business and finance manager.
- **Option 2:** One County with Three School Districts, Each with a School Committee. Two of the districts would have 4,200 - 4,700 K-12 pupils and a third would be the Franklin County Technical School.
- **Option 3:** Six Regional School Districts (Five K-12 Academic Districts Plus Franklin County Voc-Tech); Each with a superintendent and business manager.

The study describes each of the options in detail and also suggests ways the Greenfield Community College could play a greater role in helping Franklin County students to be ready for college and career. The study argues that the Governor and legislators need to play a greater role in Franklin County education by taking the following actions:

- Restore Chapter 70 state aid foundation to 2002 levels (the highest) and adjust for inflation each year.
- Appropriate 100% of Chapter 71 state transportation funds.
- Restore multi-year incentives for regional districts, continue allocation of state funds for regionalization studies, allow the transfer of state financed school buildings for other town purposes or the forgiveness of debt on closed buildings if needed.
- Restore state funding of MCAS summer and after school remediation programs for schools with unsatisfactory passage rates and less than adequate yearly progress status.

The study also makes arguments for the following strategies for promoting collaboration and improved readiness for college and careers:

- Appropriate funds to help all Education Collaboratives maintain and improve their usefulness to schools by appropriating at least 10% of staff costs as done in Connecticut and New York.
- Require all schools and districts to join the state Group Insurance Commission (GIC) unless they can provide similar economic efficiencies.
- Place a cap on school choice.
- Cushion the impact of Charter Schools on local budgets.

- Extend broadband to rural communities and implement 1:1 for students and teachers.
- Assist the county high schools willing to expand Dual Enrollment/Early College with Greenfield Community College.
- Finance a Readiness Center in Franklin County with the help of UMASS Amherst, the state colleges, GCC, and existing teacher centers in Western Massachusetts.
- Set a target of reducing state reporting requirements.

The study goes on to make a number of other recommendations and ends with a reference to the Daniel Shays Rebellion and suggests, “The next rebellion, perhaps of taxpayers joined by teachers, might be for the reallocation of funds, the reorganization of districts, and the readiness of pupils for colleges and careers.”

The problems identified in this study have not been solved. And while their recommendations are beyond the scope of this Phase II Sustainability Study, the notion of a broader regional vision and solutions, with associated recommendations, perhaps should be reconsidered.

Link to study, [HERE](#).

School District Consolidation in Massachusetts: Opportunities and Obstacles (Carleton, Lynch, O’Donnell, 2009)

The public discourse on regionalization was furthered in 2009 with the publication of [School District Consolidation in Massachusetts: Opportunities and Obstacles](#) (Carleton, Lynch, O’Donnell, 2009). This Massachusetts DESE Education Research Brief provided a data and policy perspective of regionalization. It provided a brief history of regionalization; explained the complex web of relationships that already exist among districts; looked at some demographic, fiscal, and programmatic factors that might motivate districts to regionalize; and uncovered some lessons from a recent series of regionalization studies.

The brief was part of the DESE regional study grants initiative. The Department took this step because, as of 2009, small districts were not moving toward regionalization, despite the motivating factors of regionalizing fully detailed in the brief. This grant initiative was started as a way of incentivizing small districts to seriously study and consider regionalization. Thirty-four districts, comprising 12 regional study groups, received regional planning grants from DESE in fiscal year 2009. Almost all of the regional studies identified major obstacles to regionalization. These obstacles have generally been identified in previous studies mentioned above but are systematically categorized and fully explained and predictable in the brief, such as loss of local control; fear of elementary school closures; Chapter 70 formulas that require some members to pay more than others in per pupil terms because of the town’s income and property wealth; equalizing salary schedules in merged districts which usually means the highest salary schedule among the districts would likely dictate the regional district’s salary schedule; transition costs associated with the creation of the regional district; regional transportation and the consistent underfunding of regional transportation aid from the state; and educational programming differences.

The study noted that,

for many districts the benefits of consolidation simply do not outweigh the costs. The longstanding legal and financial relationships may also act as a disincentive by providing districts some of the benefits of fully regionalizing without giving up local control. Adding to matters further is the array of district

configurations that exist in the state, which means that there can never be a one-size-fits-all solution to issues that arise in the course of regional planning.

The study noted that the state will have to provide additional resources, such as help with transition costs and issues related to the Chapter 70 formula and other areas of municipal finance, that may currently be practical disincentives to regionalization.

Regional Planning Study Results (Lynch, 2010)

An even clearer understanding of regionalization emerged from the publication of the [Regional Planning Study Results](#) (Lynch, 2010). This study reviewed all of the reports generated by the communities and districts that had participated in the DESE competitive grant program. All participants were required to submit a report which summarized the individual results of the individual planning studies in the context of the district's existing affiliations and compared the findings with concerns and benefits that have been identified in the past. The summary presented three categories of findings: Common Benefits and Common Problems with the latter further divided into Financial Challenges and Misconceptions.

Why, or Why Not, Consolidate?

Common Benefits

- Construction efficiencies provide an enticement to districts experiencing declining enrollments.
- More efficient use of school buildings under a regional structure may eliminate overcrowding.
- A larger student base often provides greater opportunity to broaden educational programming and a larger district may provide more economies of scale.
- Articulation of curriculum and streamlined governance likewise support K-12 regionalization.
- Envisioned educational improvements in a regionalized situation.

Common Problems

- The cost of regionalizing would not outweigh the additional financial investment.
- Local control issues continue to hinder efforts to regionalize.
 - Agreement language has been tailored in many existing regional agreements to require that elementary schools will be retained and/or that at least one elementary school building will remain in each member town.
 - Towns concerned that they will be subsumed by a larger town and will have little voice in regional deliberations have proposed electing school committee members by at-large elections.
- Financial challenges were prominent in many district studies.
 - The potential that combined collective bargaining agreements would result in staff salaries being raised to the highest among the member towns is a substantial cost deterrent.
 - The requirement that a town pay an assessment that is based on its financial ability rather than a per pupil amount as had been stipulated in most older regional agreements causes disparities between towns and has stymied most regional activity during the last ten years.
 - State requirements to pay a required minimum local contribution and to forgo state school construction assistance if closing a building are real cost barriers to regionalization.
 - The reduction in state support for transportation and lack of state funds to help with transition costs contribute to districts' lack of faith in state promises.

Misconceptions:

- Regionalization would require school closures and students bused across town lines and larger schools governed by strangers were clarified in many reports.
- Combining school districts does not require combining school buildings and a larger school district is not synonymous with a larger school building.

Special Commission on School District Collaboration & Regionalization Report to the Legislature (2011)

The [*Special Commission on School District Collaboration & Regionalization Report to the Legislature*](#) (2011) was published as the effects of the Great Recession of 2007-2009 were increasingly affecting districts across the Commonwealth. The commission was an outgrowth of the Chapter 188 of the Acts of 2010, An Act Relative to Municipal Relief, and designed as an effort to advance school district collaboration and regionalization throughout the Commonwealth. The commission report formally recognized that a “one-size-fits-all” approach to collaboration and regionalization is impractical due to the complex affiliations and diverse configurations of school districts across the Commonwealth.

The commission developed a definition of the concept, “district capacity.” District capacity was defined as “the overall ability of a school district to achieve one primary goal – to provide all children with a broad array of high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and citizens in a democratic society.”

The commission also provided a self-assessment tool that was designed to help districts assess existing capacities within a school district, which can help district stakeholders identify areas of need and determine the most appropriate improvement strategies. The commission recommended that the tool be used to identify areas of capacity that are strong, as well as those in need of improvement, provide a starting point for future discussions and analyses surrounding potential regionalization, and to inform the district as to how to improve programs and services.

The commission report listed the benefits and challenges of regionalization most of which have been mentioned in all of the literature above.

Supporting Student and Community Success Report: Updating the Structure and Finance of Massachusetts Regional School Districts (Bump, 2017)

In October 2017, Massachusetts State Auditor Suzanne Bump released a study that highlighted challenges faced by regional school districts related to demographics, transportation, state policies, and funding in an attempt to increase understanding of the structural and fiscal disincentives to regionalization. The [*Supporting Student and Community Success Report: Updating the Structure and Finance of Massachusetts Regional School Districts*](#) (Bump, 2017) provided a comprehensive assessment of those disincentives to regionalization that have been identified in multiple regionalization studies in Massachusetts. The report of the auditor identified specific legal and bureaucratic obstacles that impede regionalization and collaboration. The findings included:

- Structural issues in the funding of regional school districts effectively discourage further regionalization.
- Regional agreements require periodic review.
- Enrollment-based assessments cause conflict, inequities, and budget approval delays within regional school districts.
- The Foundation Budget process needs to be updated.
- The current systems for inter-district choice and “tuition-in” stipends contribute to disparities in per-pupil reimbursements for RSDs.

The report made 12 recommendations that, if implemented, would remove many impediments to regionalization. Each, today, is at various states of implementation from full to partial. *Note: The implications of these recommendations will be explored further during the modeling phase of the current 2D8 study.*

| | Recommendation |
|----|--|
| 1. | The Commonwealth must provide regionalization incentives in amounts that allay and overcome the understandable reluctance at the municipal level to share control over schools with RSD member communities. One source for incentives for regionalization has been school building funding plans offered by the Massachusetts School Building Authority (MSBA). Legislative proposals at the state level for “rural school aid” or “sparsity aid” that would complement Chapter 70 aid also offer a pathway to providing incentives that recognize the unique issues that regional districts must face in serving widely distributed rural populations. |
| 2. | The Legislature should fully fund its statutory commitment to reimburse 100% of regional transportation expenses. If the Legislature remains unwilling to meet the 100% reimbursement, then it should consider setting a consistent level of reimbursement that can be used with confidence by RSDs in their budget planning. DESE should consider developing a mechanism to provide earlier and more frequent reimbursement of transportation expenditures. |
| 3. | If the Commonwealth is concerned about the lack of incentives for RSDs to cut costs of transportation, then it should consider offering an efficiency-sharing stipend (that might, in some cases, end up being greater than 100% reimbursement). |
| 4. | To promote greater competition for bus service contracts, the Legislature should consider eliminating G.L. c. 71, § 7C, which prohibits certain uses of regional transportation authorities (RTAs) to provide school district transportation services. |
| 5. | The Commonwealth should consider providing specific planning grants to examine the combination of existing RSDs into larger groupings. |
| 6. | The MSBA should provide guidance on the criteria that it uses to determine whether to seek the recapture of grant monies provided to school districts that close school facilities that have previously received MSBA funding. |
| 7. | RSDs should review their agreements every five years. Agreements that contain provisions that require legislative action should be resolved so the normal process of district-based approval and DESE concurrence can move forward. |
| 8. | For RSDs with three or more member towns, the Legislature should act to simplify the budget adoption process to allow RSDs to approve their budgets based on population rather than on the nominal number of member towns. In two-town districts, budget adoption would continue to require the approval of both member communities. |
| 9. | The Legislature should empower DESE to work with a willing district, and provide necessary funding, to fashion a pilot program (real or virtual) that would result in a single tax rate across all member towns in an RSD, including an examination of providing the RSD with independent taxation authority. |

| | |
|-----|--|
| 10. | Implement the Foundation Budget Review Commission recommendations for changes to the Foundation Budget and accompanying Chapter 70 assistance. Additionally, the Legislature should adopt the language in Senate Bill S 217 to establish a commission on RSD funding. |
| 11. | Consider revision of relevant provisions of state statutes affecting education cost reimbursements. Some of these provisions have been folded into the Foundation Budget / Chapter 70 formula and some are no longer funded in the same manner as in the past. |
| 12. | The legislature should work with DESE on revising the arrangement for inter-district choice reimbursement and tuition-in. As much as possible, tuition-in communities should be encouraged to join regional districts. |

The *Supporting Student and Community Success Report* (2017) is an important document that synthesizes a decade of research on regionalization in the Commonwealth. The report identified key structural and financial issues requiring resolution if towns and school districts are to seriously consider regionalization but also represents a difficult and protracted legislative approach that will take years to realize. It is likely that successful regionalization efforts will be challenging until the recommendations are fully realized. Regionalization studies articulate these impediments and suggest building in state incentives and regulatory changes as part of their overall plans. Only nine districts have successfully completed the process of establishing or modifying an academic regional agreement since 2000 despite DESE’s Regional Planning Grant program and the state Efficiency and Regionalization grant program, both of which have awarded many grants. The impediments to regionalization identified in this report are no doubt a contributing factor to the low number of successful regionalization efforts.

Two reports were released in December 2020 pursuant to the statutory requirement in chapter 132 of the acts of 2019: [Student Opportunity Act Local Contribution Study](#) and [Special Commission on Improving Efficiencies Relative to Student Transportation](#). The reports were prepared for the legislature to help it implement changes that would improve education funding and transportation in the Commonwealth. Some of the recommendations align with the recommendations in the Supporting Student and Community Success report (2017) but the implementation of recommendations will require political will.

[A Sustainable Future for Rural Schools \(Blais and Hinds, 2022\)](#)

This commission study was an outgrowth of the Student Opportunity Act of 2019 and it emphasized the reality that rural school districts in Massachusetts face unique and long-standing fiscal challenges. The study begins with a reiteration of the issues facing rural districts: declining enrollments, increasing costs, insufficient Chapter 70 aid, transportation costs, and reductions in learning opportunities for students. It goes without saying that these issues have figured prominently in every study since 2007.

The commission made the following recommendations:

- **Rural School Aid:** Substantially increase funding for the state’s rural school aid program and explore revising the formula to further close the gap between rural districts’ actual costs and their current level of state funding
- **School Transportation:** Implement recommendations from the Special Commission on Student Transportation Efficiencies targeting student transportation costs and consider transportation reimbursements to rural districts with a demonstrated need.
- **Declining Enrollment:** Provide funding to districts with substantial and sustained enrollment losses and move to a rolling foundation average in the foundation budget formula.

- **Regionalization:** Increase incentives and supports for rural school districts to combine and form more cost-effective regional school districts.
- **Shared Services:** Provide incentives and technical support for rural districts to adopt shared services agreements including but not limited to forming superintendency unions.
- **Special Education:** Address the high costs of special education by making available the use of extraordinary relief funding for rural districts, establishing a Special Education Funding Reform Commission, reimbursing for high-cost students during the same academic year, enhancing workforce incentives, and more.
- **School Choice:** Cap the number of students leaving rural districts through the school choice program and further explore the unique impact of school choice, charter schools and vocational schools on rural school districts.
- **Health Insurance:** Reduce the rising costs of health insurance by providing state technical expertise to evaluate the feasibility of joint purchasing plans and the option of buying into Medicare for certain retirees, ensuring that districts explore all available options before purchasing health insurance on their own and involving the GIC in exploring affordable healthcare options.

The commission report makes an important observation in regard to the way in which other states deal with fiscal challenges faced by rural districts and how Massachusetts deals with the issue:

Nationally, the fiscal challenges faced by rural and low enrollment districts are addressed in some form by 37 states. The identification and classification of these districts varies but the following terms are utilized: rural, remote, isolated, sparsely populated, and small. States generally recognize the higher per-pupil costs of low enrollment districts as a unique and separate cost factor from the additional costs incurred by being a sparse district.^{9,10} As explained below, 21 states have mechanisms to address low enrollment, 7 states have mechanisms to address sparsity, and 18 have mechanisms to address both.

In seven states, including Massachusetts, the funding mechanism is a direct disbursement, and the funds are not built into the state foundation budget. Table 10, page 24 of the report summarizes these categorical grant programs. School districts that are funded in this manner are unable to plan in advance because funding is contingent on annual legislative appropriations. District leaders cannot build budgets which rely on this funding source since the appropriation of these funds often occurs after the completion of the budget approval process.

Ongoing advocacy for legislative and rural regulatory changes has been ongoing. Senator Jo Comberford testified on the future of rural schools, [HERE](#), on October 30, 2023 before the Joint Committee on Education in support of [S. 2388](#) and H. 3567, *An Act to provide a sustainable future for rural schools*, filed in partnership with Representative Natalie Blais. She cites loss of academic programming in rural districts, the fact that the total benefit to rural districts under the Student Opportunity Act was just 0.39% of the state's \$360 million plus budget in additional aid. The bill, based on the Commission's recommendations, takes a comprehensive approach to the needs of our rural schools. The bill includes provisions aimed at:

- transportation costs, a particular hardship in rural areas;
- special education, including special education transportation;
- Rural Schools Aid;
- skyrocketing health care costs;
- the unique challenges of regional districts, including start-up costs for newly regionalized districts or shared services;

- construction and capital costs, including ways MSBA can assist communities with the costs of regionalization when it requires closing, reusing, or retrofitting school buildings

These recommendations formed the basis for House Bill H.3567 which was referred to the House Committee on Education on March 30, 2023. Most of the provisions described in that Bill were not retained when the bill was rewritten by the Joint Committee on Education. The rewritten bill ([H. 4425](#)) fails to address the deep inequities and challenges faced by rural schools. It appears that a legislative solution to the problems outlined in every study referenced in this paper will not be forthcoming.

Based on the fate of House Bill H.3567, it appears that the Massachusetts legislature, despite having the knowledge of successful practices in other states, will continue to ignore the plight of Massachusetts rural districts.

Regional School District Planning Board, 2022, BERK12.

BERK12 partnered with the Berkshire Hills and Southern Berkshire regional school districts 2020 - 2023 to support research towards potential collaboration and regionalization options. Among research questions considered were those of district/school size as well as the challenges and benefits of regionalization. A brief summary follows.

School/District Size.

The study noted that as districts form, considerations for how to configure often include questions of resource allocation, cost, ability to provide educational programming, and size. This last element, size, is often linked to the first three - what is the optimal size that achieves scale, efficiencies, equitable access, and excellence in programming?

A Massachusetts [rural study](#) (2009) defined small as less than 2,000 students. Thus, the literature on small versus large can be considered, but may not be completely applicable to even a combined 8 Town model. Drawing from a Hanover brief, [The Impact of School District Size](#), there are several key findings:

- Research suggests potential benefits of larger school districts for student achievement.
- Multiple studies suggest that a district size of 6,000 to 6,500 students maximizes cost-effectiveness, with diseconomies of scale increasing costs for larger districts.
- Districts, however, may not realize substantial cost savings after redrawing district borders due to transaction costs.
- Redrawing district borders create challenges in ensuring equity and diversity.
- Districts can make opportunities for local stakeholder involvement by transferring additional responsibilities and decision-making to the school level.
- Large education systems can leverage their size to improve student achievement.
- Smaller school districts may face more limited organizational capacity compared to larger districts.
- In general, research finds that operating costs per student are lower in smaller districts, while student achievement is higher in larger districts.

A Berkshire County Education Task Force (2019) report adds, “A common argument in favor of consolidating small, rural districts is that small districts have high per-student costs due to duplication of administrative, operational, infrastructure, and personnel costs. This question has been studied extensively, but the literature does not provide a clear answer with regard to optimal school district size in terms of cost savings and academic achievement.”

A number of studies (Duncombe and Yinger, 2007 & 2010; Cronin et al., 2009; Cooley & Floyd, 2013; Coulson, 2007; and Rooney and Augenblick, 2009) signal that long-term savings are possible but often require financial incentives, savings were possible but often smaller than projected, and savings models were often oversimplified and needed to be approached on a case-by-case basis.

A summary by Stotsky, [HERE](#), summarizes the research regarding optimal high school size, citing an “ideal size” between 600 and 900 students. Academic gains, in several studies, show dropoff in schools below 600 students, and again in schools below 300 students.

Class size, as related indirectly to school size, is another area of attention both within districts, schools, and across communities. The [2017 DESE Policy Brief, Class Size and Resource Allocation](#), summarizes, “Small classes are popular, but evidence of their positive impact on student outcomes is disappointing—and the choices districts make about class size have real, though often hidden, costs.” That said, class size is a significant indicator that many stakeholders (school committees, parents, teachers, administrators) pay close attention to and have strong feelings about.

While small size literature and rural school literature are distinct, they overlap in that they both often address the issues of size. Massachusetts has, currently, an active advocacy effort related to rural schools issues. A 2018 report, [Fiscal Conditions of Rural Districts](#), in Massachusetts found that:

- Rural enrollment is declining.
- Rural districts employ more teachers and paraprofessionals per 100 students.
- Total spending and per student spending is growing more quickly in rural districts.
- Rural districts spend more on transportation.
- Rural districts gain some benefits through state aid such as hold harmless and wage adjustment.
- Rural districts are relying more heavily on school choice as a revenue source.

There are also less visible - but critically important - effects of smaller, rural schools. A study out of the Harvard Graduate School of Education (Re & Friesenhahn) found that rural students:

- Are graduating at the same rates as their suburban counterparts, but going to college at lower rates.
- Once they get to college, they are more likely to drop out.
- Score high or higher on verbal assessments, but lower on math.
- Have access to fewer AP courses, including fewer STEM offerings.

Regionalization, pluses and minuses.

In their final report, BERK12 cites work of the Hanover Research Group ([District Restructuring](#)) that suggest, “case studies indicate that regionalization has both significant challenges, and potential benefits.” Among summarized findings are that:

- School closures (consolidation) are frequently required to achieve true economies of scale.
- Perceived governance imbalances are primary obstacles to district reorganization.
- Reorganization (with limited research in this area) has demonstrated mixed educational outcomes (positive, neutral, negative).
- Community building mechanisms smooth the transition process by bridging perceived sociocultural distinctions.
- Key factors to successful regionalization include: empower stakeholders in shared decision-making, high levels of communication, transparency in governance and decision-making, creative solutions that mitigate against/repurpose closed schools, ensuring a well-organized transition process if consolidation is chosen.

A summary snapshot from the report lays out some of the key pros and cons to regionalization, in broad terms.

| PROS | CONS |
|---|---|
| <ul style="list-style-type: none"> ▪ Reduced school costs; ▪ Reduced taxes for some residents; ▪ Additional state aid; ▪ More efficient use of resources and increased buying power; ▪ Greater academic and programmatic opportunities; ▪ Better instructional materials and equipment; ▪ Expanded extracurricular and sporting programs; ▪ Greater cultural diversity. | <ul style="list-style-type: none"> ▪ Less individualized attention on students and losing benefits of small school environment; ▪ Culture disruption and loss of community identity ▪ Change in teacher and staff pay scale; ▪ Cumbersome process; ▪ Longer bus rides for some students; ▪ Increased taxes for some residents; ▪ One-time costs: signage, uniform, new websites, and other transition costs. |

Key findings relevant to the efficacy of moving from more smaller districts to fewer larger districts included:

- School closures are frequently required to achieve true economies of scale. Often pursued to limit the costs associated with running smaller schools, to better balance/maximize class size, and to ensure a full range of educational programs and services.
- Reorganization has resulted in mixed educational outcomes. Studies suggest some gains in adopting a unified curriculum, expanding academic and enrichment opportunities when going from smaller to larger. In contrast, some reorganization has resulted in continued achievement gaps among at-risk and low income students.
- Research is limited and mixed on the effectiveness of reorganization on cutting costs. While studies signal operational costs decrease, cost savings may be diminished by capital spending. A summary table from the Hanover report, shared below, shows that there are several sources of both economies of scale and diseconomies of scale to consider.

| POTENTIAL SOURCES OF ECONOMIES OF SCALE | POTENTIAL SOURCES OF DISECONOMIES OF SCALE |
|--|--|
| <p>Indivisibilities</p> <ul style="list-style-type: none"> One central administration (e.g., superintendent, school board) or school teacher can serve a broader number of students without a significant drop in the quality of education. | <p>Higher transportation costs:</p> <ul style="list-style-type: none"> Larger districts must account for average transportation distance to increase, as well as student travel time. |
| <p>Increased Dimensions</p> <ul style="list-style-type: none"> Larger schools can achieve a lower average cost of heating, communications, and specialized facilities (e.g., science or computer lab). | <p>Labor Relations Effects</p> <ul style="list-style-type: none"> A more active teachers' union in a larger district may prevent staff layoffs, thereby eliminating a major source of cost savings from consolidation. |
| <p>Specialization</p> <ul style="list-style-type: none"> Larger schools may be able to employ more specialized teachers (e.g., computer science or math teachers), providing a compelling justification for consolidation in an era of rising standards. | <p>Lower Staff Motivation and Effort</p> <ul style="list-style-type: none"> Administrators and teachers may have a more positive attitude towards work in smaller schools, which tend to offer more flexibility and opportunities for input from all school personnel. |
| <p>Price Benefits of Scale</p> <ul style="list-style-type: none"> Large districts may be able to take advantage of the price benefits of scale by negotiating bulk purchases of supplies and equipment or imposing lower wages on employees. | <p>Lower Student Motivation and Effort</p> <ul style="list-style-type: none"> Employees in smaller schools are more likely to know students by name and to identify and assist at-risk students. Students in smaller schools may also have a greater sense of belonging, more positive attitude toward school, and a higher motivation to learn and participate in extracurricular activities. |

BERK12 compiled a list of synthesis of advantages and disadvantages as related to regionalization; it is provided here as an additional reference.

The Advantages of Regionalizing. The benefits associated with regionalizing have been captured in the many planning processes, research papers, and summaries of regionalization processes. A curated list captured through these various experiences and studies is outlined below.

- A single school committee with cohesive educational policy for all K-12 students.
- A single administration with potential for more efficient and economical operation of school departments.
- A coordinated curriculum, kindergarten through grade twelve.
- Expanded curricular offerings due to fiscal efficiencies to serve an increased number of students from combined enrollments, envisioned educational improvements in a regionalized situation.
- Fuller utilization of teachers and other staff and school facilities.
- Opportunity to offer more enrichment within the school curriculum.
- Opportunity to expand athletic programs and extracurricular activities.
- Coordinated program of testing, guidance, health services and support services.
- A single salary schedule and set of bargaining agreements for staff in each bargaining unit.
- A single budget, administered to take advantage of efficient, centralized purchasing techniques and coordinated transportation.
- Expansion of critical mass to gain economies of scale and aggregated purchasing power of goods and services.
- Opportunity for more administrative capacity at the district and school level.
- Opportunity to redirect leadership time and energy to educational programs through a reduction of duplicative effort in business procedures, reporting and negotiations.
- Expanded offerings could lead to fewer students leaving the district under School Choice.
- State regional transportation reimbursement.

- Additional reimbursement points (potentially) granted by MSBA for regional school building projects.
- Construction efficiencies as an enticement to districts experiencing declining enrollments.
- A larger student base often provides greater opportunity to broaden educational programming and a larger district may provide more economies of scale.
- Utilization of sound, long range planning (and fuller utilization of teachers and school facilities for all the pupils affected).
- Greater cultural diversity.

The 2011 Special Commission Report uses the term “district capacity,” a term we have adopted throughout BERK12 work. District capacity is defined as, “the overall ability of a school district to achieve one primary goal –to provide all children with a broad array of high-quality and developmentally appropriate educational opportunities that will enable them to successfully complete postsecondary degrees and/or become productive members of the workforce and citizens in a democratic society.” A highly functioning district, thus, includes the following advantages:

- Design and implementation of challenging, aligned, and coherent instructional programs and services (consistent with state and national standards) that are dedicated to the development of the whole child;
- Evaluation of program effectiveness through analysis, on a regular and ongoing basis, of student growth and achievement data using clearly identified and developmentally appropriate criteria;
- Recruitment, retention, and development of highly qualified staff members, and regular evaluation of their ability to promote high-quality student learning and social/emotional development;
- Effective communication and collaboration with parents, families, local and state officials, and other community members to promote student achievement and development;
- Support and promotion of positive, nurturing, and safe learning environments in all classrooms and schools; and
- Maximization of the allocation and expenditure of district funds, resources, and materials, and accurate monitoring of expenditures over time.

In addition, school districts must operate efficiently to achieve the above mentioned goals, thus a regionalization approach has the capacity to do so. While there are many advantages, there are also challenges and potential obstacles.

The disadvantages associated with regionalizing have been captured in the many planning processes, research papers, and summaries of regionalization processes. A curated list captured through these various experiences and studies is outlined below.

- Feared loss of focus on elementary education.
- Fear that elementary students will be transported across town lines and with longer bus rides.
- Differences in financial support of education in member towns; Objection of wealthy districts to joining with poorer districts for fear of having to pay an undue share of the costs of the new district; Poorer districts fearing increased taxes to meet higher standards.
- Differences in educational goals and objectives.
- Real or perceived social differences.
- Unwillingness to share control with neighboring towns.
- A fear of loss of local pride and control.
- Loss of community voice through reduction of School Committee representation.
- Potential change in administrative leadership and staff.
- Loss of town control of state aid when funds are distributed directly to the regional district; Unwillingness to share budget control over educational spending.

- Loss of direct budget control and control of school buildings.
- Potential for closing town school buildings; the misconception that regionalization always entails the closing of school buildings.
- Concern for job security and impact on teacher salaries, benefits and professional status.
- Short term transition costs.
- Lack of support and guidance for regional planning and transition.
- General resistance to change.
- Operational issues – e.g. reconciling collective bargaining agreements, consolidating central office functions, and resolving debt obligations for school facilities.
- Disparities in per-pupil spending between districts.
- Concern over capital and operational assessment methodologies and costs.
- Real or perceived economic, educational and/or social differences between districts.
- Belief that smaller is better with more individualized attention to students.
- Belief that the town is doing its best for students and the joint district would be too far removed from understanding of town desires and interests.
- Fear there will be more bureaucracy in a larger regional administration.
- Fear there will be larger schools and larger class sizes.
- Fear that regional districts cost more to operate.
- Impact of state aid calculations - Belief that more state aid, or a change in the state aid formula or a reduction of state and/or federal mandates will resolve existing financial challenges and allow the existing towns to remain solvent.
- Potential increased costs due to: Additional costs to coordinate technology, align curriculum and school schedules, negotiate and combine contracts and leases, etc.; Merging collective bargaining agreements; Legal costs to develop the regional agreement and negotiate contracts.
- Credibility of the state - lack of trust in continued state reimbursement for regional transportation.
- Potential loss of state construction aid if closing a school building recently constructed or renovated with state funds.
- Changes in operational assessment methodology under the education reform law requiring towns to pay according to their ability based on state formula and not on a per-pupil basis.

This section of the report presented a summary of state sponsored studies and reports that have looked at rural Massachusetts districts from the perspective of regionalization and formal collaboration. The next section will review the promising practices in rural education and review available resources.

IV: RESOURCES AND PROMISING PRACTICES IN RURAL EDUCATION

According to the National School Boards Association (NSBA), in 2021, 9.8 million students (20% of all public school students) attended public schools in rural areas. There were 27,494 public elementary and secondary schools in rural fringe (41%), rural distant (36%), and rural remote (22%) communities. The pupil/teacher ratio in rural fringe schools was 15.5; in rural distant schools, 13.7; in rural remote schools, 12.2. On average, there were 553 students in a rural fringe school, 282 students in a rural distant school, and 163 in a rural remote school. That being said, there are significant differences in terms of poverty, student and family diversity, educational outcomes, and access to student support for learning and development.

The [National Rural Education Association](#) (NREA) ranks all 50 states across the differences mentioned above.

Massachusetts is described as a low priority state by the organization because of a variety of factors. [The 2023 NREA State Ranking](#) describes Massachusetts as follows:

Although there are few rural schools in Massachusetts, rural schools serve around 74,000 rural students. The state is marked by very low rates of poverty, both on measures of poverty rates in rural school communities as well as on measures of the percentage of the state's school age children who live in homes with incomes below the poverty line. No state has fewer uninsured rural children. NAEP scores for rural fourth and eighth graders are some of the best in the United States. Rural students in the state benefit from the rural graduation advantage and are almost 6 percentage points more likely to graduate from high school than their non-rural peers. This is more than double the rural U.S. average of 2.6 percentage points.

While Massachusetts may be considered a low priority state by the NREA, the rural school districts in Massachusetts still face challenges not shared by their urban and suburban neighbors. The following is a list of practices that have been effective in rural schools across the country. Some of them will be familiar in that the MTRSD has employed some of them.

1. **Community Engagement:** Rural schools often have strong ties to their communities. Engaging with local community members, parents, and organizations can provide additional support, resources, and opportunities for students.
2. **Personalized Learning:** With smaller class sizes, rural schools can often provide more personalized attention to students. Teachers can tailor instruction to meet individual needs and learning styles.
3. **Technology Integration:** Despite potential limitations, many rural schools are integrating technology into the classroom to enhance learning opportunities. This could include online resources, virtual field trips, and distance learning options.
4. **Multi-grade Classrooms:** Due to smaller student populations, multi-grade classrooms are common in rural schools. Skilled teachers are able to differentiate instruction to meet the needs of students at various grade levels.
5. **Project-Based Learning:** Rural schools often utilize project-based learning approaches, which can be especially effective in engaging students and fostering critical thinking, problem-solving, and collaboration skills.
6. **Partnerships and Collaborations:** Rural schools often partner with local businesses, universities, and organizations to provide additional resources, support, and learning opportunities for students.
7. **Outdoor Education:** Many rural schools take advantage of their natural surroundings by incorporating outdoor education into the curriculum. This can include field trips, environmental education, and outdoor recreational activities.

8. **Flexible Scheduling:** Rural schools may implement flexible scheduling options to accommodate the needs of students, families, and the community. This could include alternative school calendars or blended learning models.
9. **Professional Development:** Providing ongoing professional development opportunities for teachers and staff is essential in rural schools to ensure they have the necessary skills and resources to meet the diverse needs of their students.
10. **Cultural Relevance:** Recognizing and celebrating the cultural diversity within rural communities is important for creating inclusive learning environments where all students feel valued and represented.

Rural Resources, Networks.

The following are provided as additional resources that may be useful as the Phase II Sustainability and options/opportunities are explored.

The [National Rural Education Association](#) (NREA) is a national organization that has existed under one name or another since 1907, and has focused on assisting rural schools. It has affiliates in 37 states (Massachusetts is not an affiliate). The NREA provides resources on a wide variety of topics that are important to rural schools: [NREA Resources](#). It also has a 2022-2027 [Research Agenda](#) which was developed in response to stakeholders across the country who were invited to provide their perspectives on the strengths and needs of rural schools.

The [US Department of Education Rural Education Resource Center](#) is a clearinghouse for grant opportunities and programs focused on improving rural education. The Rural Education Resource Center does not require membership for access to its resources, but it could become a focus for the MTRSD in terms of grant opportunities.

[American Education Research Association \(AERA\) Rural Education Special Interest Group](#) was formed to promote high quality research that increases understanding of rural education, broadly defined, and has potential to benefit rural schools and communities. The SIG regularly publishes [Newsletters](#) which feature best practices in rural education.

[Regional Educational Lab](#) supports rural students, skills, and educators. RELs work in partnership with states and districts to 1) conduct original high quality research, 2) provide training, coaching, and technical support, and 3) disseminate high quality research findings about rural students, teachers, and schools.

[National Center for Rural Education Research Network](#) is a department within the Harvard School of Education that uses a continuous improvement process designed to build the capacity of rural districts, engage district staff as key decision makers throughout the process, and foster collaboration and cross-district learning, while generating evidence about what works in rural education.

[Transcend](#), is organized to *support school communities to create and spread extraordinary, equitable learning environments*. They are currently supporting an innovation in rural education (rural schools design) initiative. The Southern Berkshire Regional Schools are a current member of this initiative. Learn more [HERE](#).

[Rural Schools Collaborative's](#) aim is to build sustainable rural communities through a keen focus on place, teachers, and philanthropy. Their work strengthens the bonds between rural schools and their communities by collaborating on models to address the rural teacher shortage, sustainably fund rural school communities, promote place-based learning, and share a positive national rural narrative.

Rural Resources, Case Examples.

The **Rural School Innovation Zone (RSIZ)** is a partnership made up of five school districts and five institutions of higher education in South Texas. The RSIZ is a nonprofit organization designed as a sustainable collaborative to provide rural students high-quality opportunities for postsecondary success. RSIZ students can attend programs at other RSIZ academies, but will remain accounted for within their home school and district. Transportation is provided to all students to attend RSIZ academies. Athletics are managed and maintained by districts, and districts oversee their schools and manage in select other areas. Specific school or district policies and rules apply to students when they are at that campus, with future consideration of potential modification of rules and policies.

Green Mountain Union High School, Vermont (Project-Based Learning): This innovative school integrates hands-on projects into every subject. Students might design and build a solar-powered car in science, or write and stage a historical play in English. Green Mountain Union consistently ranks high in graduation rates and test scores.

Pine Ridge School District, South Dakota (Community-focused Education): Located on a Lakota reservation, Pine Ridge incorporates Lakota language and culture into its curriculum. The district also has a strong focus on social-emotional learning, helping students navigate the challenges of reservation life. Pine Ridge has seen significant gains in attendance and graduation rates [source needed].

Highland High School, Kansas (Technology Innovation): Despite its rural location, Highland High School boasts a state-of-the-art technology program. Students can take courses in cybersecurity, web design, and even operate their own student-run radio station. Highland graduates are well-prepared for careers in the tech industry [source needed].

Highland School District (Arkansas):

Highland School District in Arkansas has implemented a successful virtual learning program called "Highland High School Online." This program allows students to take online courses for credit recovery, advanced placement, and career readiness, expanding their course offerings beyond what the small rural district can provide locally.

Calhoun County Public Schools (Virginia):

Calhoun County Public Schools in Virginia has developed a comprehensive place-based education program called "Partnership for Place." This program integrates local culture, history, and natural resources into the curriculum, providing students with meaningful learning experiences that connect them to their community.

Talawanda School District (Ohio):

Talawanda School District in Ohio has partnered with local businesses and Miami University to create the "Talawanda Academy of Global Studies." This academy offers students the opportunity to participate in project-based learning experiences, internships, and cultural exchange programs, preparing them for success in a globalized world.

Baldwin Community Schools (Michigan):

Baldwin Community Schools in Michigan has implemented a mobile learning lab called the "Roving Learning Lab." This lab travels to different communities within the district, providing students with access to technology, educational resources, and enrichment activities that they may not have access to otherwise.

Nabugabo Updeal School (Uganda):

Nabugabo Updeal School in Uganda has partnered with local organizations to address healthcare challenges in the community. The school provides health education, vaccinations, and access to healthcare services for students and their families, improving health outcomes and reducing absenteeism.

Molly Stark School (Vermont).

Molly Stark Is a Full Service Community School where health services (physical and mental) is integrated into the school and available to students, parents, and community members. They have historically offered birth to age 5 services, and parents support (such as literacy tutoring).

Strategic Measures for Rural School Districts

Cost-saving measures are often essential for rural schools, which may have limited budgets and resources. Here are some cost-saving measures commonly employed by rural schools:

1. **Energy Efficiency:** Implementing energy-saving measures such as installing energy-efficient lighting, HVAC systems, and appliances can significantly reduce utility costs over time.
2. **Shared Services:** Collaborating with other schools or districts to share resources and services, such as transportation, food services, and special education programs, can lead to cost savings through economies of scale.
3. **Online Learning and Distance Education:** Offering online courses or partnering with virtual learning platforms can expand course offerings without the need for additional physical classrooms or teachers.
4. **Telecommuting for Staff:** Allowing staff members to telecommute for administrative tasks or professional development can reduce overhead costs associated with office space and utilities.
5. **Bulk Purchasing:** Negotiating bulk purchasing agreements for supplies, equipment, and technology can help rural schools secure discounts and lower prices from vendors.
6. **Volunteer Programs:** Leveraging volunteers from the local community or partnering with service organizations can provide additional support for various school activities, reducing the need for paid staff or contractors.
7. **Maintenance Planning:** Implementing proactive maintenance plans for school buildings and facilities can help prevent costly repairs and prolong the lifespan of infrastructure.
8. **Digital Communication:** Utilizing digital communication channels, such as email, websites, and social media, for school announcements, newsletters, and updates can reduce printing and postage costs.
9. **Grant Writing and Fundraising:** Investing in grant writing efforts and fundraising activities can help secure additional funding sources to supplement the school budget and support specific programs or initiatives.
10. **Shared Staff Positions:** Sharing staff positions, such as nurses, counselors, or technology specialists, with other schools or districts can help distribute personnel costs and maximize resources.
11. **Consolidation or Regionalization:** Exploring opportunities for school district consolidation or regionalization can lead to cost savings by streamlining administrative functions and eliminating duplication of services.
12. **Flexible Staffing Models:** Implementing flexible staffing models, such as hiring part-time or temporary staff when needed, can help manage payroll expenses while still meeting the needs of students.
13. **Partnerships with Community Organizations:** Forming partnerships with local community organizations, such as childcare providers, preschools, and youth organizations, to create seamless educational pathways for students from early childhood through high school. These partnerships can help increase enrollment by attracting families with young children and retaining students as they progress through the educational system.

14. **Dual Enrollment and College Credit Programs:** Expanding dual enrollment and college credit programs in partnership with local colleges and universities. By offering students the opportunity to earn college credits while still in high school, rural schools can attract motivated students and demonstrate the value of their educational programs.
15. **Marketing and Outreach:** Actively marketing programs and services to attract students from neighboring communities. This may involve promoting unique academic offerings, extracurricular activities, and specialized programs, such as career and technical education (CTE) pathways or magnet programs.
16. **Online and Blended Learning:** Expanding their online and blended learning options to attract students who may prefer alternative educational formats or who live too far from the school to attend in person. Virtual academies, online courses, and hybrid learning models provide flexibility for students and families while expanding enrollment opportunities for rural schools.
17. **Mobile Learning Labs:** Mobile learning labs equipped with laptops, tablets, and educational software are being used in some rural schools to bring technology and digital resources directly to students. These labs can travel to different communities within the district, providing access to educational opportunities for students who may not have reliable internet access at home.
18. **Place-Based Education:** Place-based education focuses on connecting students to their local environment, culture, and community through hands-on learning experiences. Rural schools are incorporating place-based education into their curriculum to make learning more relevant and meaningful for students while fostering a sense of place and belonging.

V. KEY TAKEAWAYS AND APPLICATIONS FROM HISTORICAL STUDY

The preceding review of the history of regionalization and collaboration efforts between the towns of Ashfield, Buckland, Charlemont, Colrain, Hawley, Heath, Plainfield, Rowe, and Shelburne provides an important backdrop, context, and the potential for applications which may help to inform current 2District8Towns efforts. Below, a number of key takeaways are curated from this literature review. We expect these are not the only lessons learned, and we believe (and encourage) there are others that can be drawn based on unique perspectives, experiences, and context. Each takeaway will be followed by a potential application for consideration by the 2District8Towns as it advances the research and study process:

1. At different points over the last 70 years (or more), the nine towns have recognized a need to consider, plan for, and make substantial changes to their public education system. There has been a general willingness to participate and invest in these studies and efforts as shown by the creation of the MTRSD in 1964, the opening of the MTRS in 1967, the 1993 reorganization into a PreK-12 district, a number of studies in the mid 2000s, and the various amendments to the regional agreement.
 - a. **Application(s):** Affirm the enduring willingness to participate in the talks regarding collaboration/regionalization/reorganization. Frame the current 2District8Towns effort as an essential next step in the process of addressing needs that have yet to be met, and as a contemporary call to action - reinforce that this is not a quick process, rather it requires ongoing iteration and broad engagement.
2. Since 1986 there have been well-conceived and well-executed studies examining the district's enrollment, facilities, and finances which have repeatedly resulted in recommendations for the consolidation of elementary grades into a) grades 5 and 6 into MTRS facility or b) all elementary students into a single facility.
 - a. **Application(s):** The resistance to consolidation of the MTRSD and HRSD elementary students is a topic that requires a frank, dispassionate discussion among all stakeholders. The 2District8Towns can help bring the stakeholders together to better understand the historical context, the challenges facing the districts, and the political will necessary to a successful resolution.
3. While the nine towns have enjoyed many successes over the history of the district (partially listed in #1), a consistent feature of the last 17 years is the failure of recommendations to overcome resistance of one or more of the stakeholder groups.
 - a. **Application(s):** The historical record identified the importance of the following stakeholder groups to the successful outcome of any initiative: families of students, town voters, teachers, teacher unions, school and district administrators, school committees, and town officials and boards. Conduct outreach (surveys, focus groups, interviews, convenings) to accurately assess the fears, biases, interests (non-negotiables), and underlying beliefs of each stakeholder group as a means of honing the information the varying stakeholders will need in order to make a decision. Develop a targeted communication plan that ensures receipt of the information across these identified stakeholder groups.
4. The laws and state funding for efforts by rural districts contain disincentives (and limited incentives) which have limited the emergence of new academic regions to seven since 1970. Similarly, the laws and funding for educational collaboratives have resulted in the establishment of only two (2) extant collaboratives west of Worcester.

- a. **Application (s):** 2D8T models should not be shy about including recommendations for the legislative changes outlined in several reports as necessary for successful regionalization/collaboration. This could take the form of specific incentives and/or regulatory relief needed to enact a successful regionalization/collaboration proposal, will require ongoing support and advocacy from the local delegates and groups such as the MASC Rural Advocacy, that could focus on deeply identifying opportunities and advocates for legislative changes that could facilitate increased collaboration. Given any substantial solutions will require state partnership, the advocacy function is of high priority.
5. As an extension of #3, at the point of decision, various constituencies - often different - have objected to the proposed solutions based on (both in HRSD/MTRSD and “like” state efforts), generally:
- a. Questions of representation.
 - b. Questions of (real) fiscal savings and impact (positive and negative) to state aid and school choice funds.
 - c. Questions about benefit to individual districts (often varied) by school administration, school committees, and employee unions.

Specifically, particular disincentives have resonated with unique stakeholder groups, including concerns related to (a short list):

- Local control.
- Potential closing of schools, and what to do with empty buildings.
- Potential for reduction in staff (people losing their jobs).
- Loss of community identity as related to local schools.
- Excessive travel time.
- Impact on extracurriculars (busing distance/times, fewer athletic teams and production slots).
- Capital costs.
- Budget, who pays what? Whether the benefits (financial or otherwise) are equal between districts/towns.
- Questions of whether the savings are significant enough to make regionalization/collaboration worth doing.
- Legislative and regulatory barriers (such as funding formula, transportation reimbursement).
- Concerns about how curriculum and programs can/will be integrated.
- Transitional costs.
- Power structures, one district/town perceived as having more/less voice and control over process.

- a. **Application(s):** Historical and literature documented disincentives should be specifically addressed as part of any options and opportunities. For example, the question of representation will need to be answered in an equitable way, finances understood at both the district/town/and local taxpayer levels, and assurances such as job loss and school closures considered. Engaging various stakeholders, i.e. school administration, school committee, employee union, town officials, regarding the benefits and drawbacks of each of the three options, and using them to inform others, is important in developing solutions that yield fiscal and educational value, and are politically viable. Recognize that self-interest will compete with compromise and emotion with facts.

6. When examined as a collective body of options and opportunities (one featured in #2 above), these provide a foundation for consideration in this Phase II study. These ideas from historical studies, research conducted at the

state level pertaining to collaboration, consolidation, and regionalization efforts, and best practices and case studies from rural districts serve as a set of informed reference points.

- a. **Application (s):** The research team and Steering Committee should carefully curate the complete findings from historical work (a starting list from this report can be found in [Appendix A](#)), state efforts, and rural practices and combine these with information from regional stakeholders and a review of current literature - to build a master list (“universe of possibilities”) for discussion and evaluation by the Steering Committee and local stakeholders.
7. Historical regional conversations in Franklin County have, at times, extended beyond HRSD/MTRSD (the 8 towns) to include surrounding communities and schools.
 - a. **Application (s):** The 2D8T charge is to explore specific possibilities within/between HRSD/MTRSD. Yet, there may be a unique opportunity (and a more lasting solution), as research and modeling occurs, to engage neighboring communities as part of an extended set of options and solutions given these communities face many of the same pressures the Sustainability Study is responding to. In the absence of county government, how that happens is something to be discussed strategically with the Steering Committee.
 8. Leadership is critical to any regionalization/collaboration effort in planning, engaging the public, and implementing solutions - and it must come from both inside and outside the schools. The significant leadership (“champions”) needed must be weighed against the day-to-day responsibilities of district administrators who must focus their attention on the demands associated with their own districts. Similarly, school committees are also charged with ensuring the ongoing operation (and to some extent the existence) of their districts, and must balance significant responsibilities and demands associated with these volunteer roles with the additional energies needed to explore benefits and possibilities of regionalization/collaboration. In light of these considerations, both school administrators and school committees are critical stakeholders and leaders in any regionalization/collaboration effort.
 - a. **Application(s):** The 2D8T should continue to acknowledge that they serve a specific mandate to study, explore, model and consider/recommend potential solutions. As this research is ongoing, 2D8T can also provide ongoing administrative support and mobilize leadership from both within and outside the schools to champion the research/planning effort and preferred solutions. This “call to action” will ensure the leadership necessary to bring communities and constituencies together around shared interests and aspirations, and move beyond town boundaries and towards mutually reinforced (in some cases) compromise solutions. Additionally, those who stand in critique (or opposition) must be heard as early in the process, as possible, to acknowledge and respond.

Closing.

The representatives of the MTRSD and the HRSD and their member towns have been revisiting the topics of regionalization and increased collaboration for the past 70 years. The historical concerns in regard to educational quality, vocational opportunities, declining enrollment, building needs, and fiscal efficiency continue to be the driving factors motivating those discussions. Solutions to these concerns can be crafted, but any solution will require support from all of the stakeholders. Therefore, the task at hand is to craft a worthwhile solution, a solution that will address the needs for decades to come, and a solution that can be generally supported by broad stakeholders’ groups.

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This document was reviewed and edited by a number of individuals from the research team, the 2D8T team, school administrators, and BERK12 members. We are thankful for their time and talent (and critique) invested. We can be reached at jakeeberwein@gmail.com or by dropping a comment on our website at 2Districts8Towns.org.

Thank you!

Appendix A. Summary of Recommendations

Note: This list represents a summary of key recommendations that were generated from the various regional studies. They are not overly detailed, but capture some of the key suggestions these efforts made. Considerations made at the state level (Section 3) or among rural districts/networks (Section 4) are not listed here, but will be included in a master list as the Sustainability Study moves into Stage II.

1986 Long-Range Planning Initiative Recommendations

1. Should each school district attempt to resolve space needs by initiating building programs, or should consideration be given to a building project on a regional basis? A building project at Mohawk Trail Regional High School could be expanded to include grades five and six in the middle school. This could alleviate some of the space needs in all elementary schools.
2. How many building projects will the state fund?
3. The concept of kindergarten through twelve regionalization needs to be seriously examined. The Department of Education has recommended that in view of the various space and building needs facing the nine towns, consideration be given to the creation of a single school district for the eight towns included in the high school district. Rowe would likely continue the current practice of operating as a separate K-12 school district. The advantages and disadvantages of a fully regionalized school district have to be studied carefully to assess the educational and financial impact of such a move. Any changes in the existing regional school agreements would require the approval of all communities.

2007 Interim Planning Recommendations

- Create a regional elementary school by combining four elementaries into one at BSE over three years
- Simultaneously pursue lobbying effort to increase state funding and thus more permanent solution
- Focus on shaping the new regional elementary into a highly desirable school

Other aspirations/comments noted included:

- Provide children with regular and meaningful programs in the related arts" (art, physical\education, music)
- Maintain class sizes at "reasonable" levels (The Education Task Force recommended grades K-1, 15 students per classroom maximum; grades 2-4, 20 maximum; grades 5-8, 24 maximum; grades 9-12, 25 maximum.)
- Avoid disruptive levels of staff turnover
- Have the resources (fiscal and otherwise) to carry out carefully developed research-based learning activities that are consistent with State Curriculum Frameworks. The majority report included some strengths and opportunities such as: consistent education for all children entering middle school
- Full-time in-building principal
- Possibility for accelerated academic track
- Centralization of SPED services
- Core social diversity, greater pool of friends for all kids
- Before-school and after-school programs for all families
- 6th graders at the Middle School get access to content-specialist teachers, foreign language classes, sports teams, drama

2008 Creating a Sustainable and Quality Education System in Franklin County Public Schools (Public Management Associates)

The essential recommendations were:

3. Establish a new county-wide Franklin County Educational Collaborative (FCEC)
4. Organize the FCEC under the umbrella of the Franklin Regional Council of Governments (FRCOG)

These were 4 other recommendations that consisted of guidance on how to accomplish the essential recommendations. While the recommendations of this study were not implemented the research provided the basis for the next Phase of the initiative.

2009 Franklin County Schools: A 2020 Vision (NESDEC)

The NESDEC study recommended the careful consideration of three options for improving and sustaining the education infrastructure of Franklin County:

- **Option 1:** A Franklin County Unified School District which would replace the nine superintendents and 20 school committees with a single Franklin County School Committee, one superintendent, one deputy for teaching and learning, and one business and finance manager.
- **Option 2:** One County with Three School Districts, Each with a School Committee. Two of the districts would have 4,200 - 4,700 K-12 pupils and a third would be the Franklin County Technical School.
- **Option 3:** Six Regional School Districts (Five K-12 Academic Districts Plus Franklin County Voc-Tech); Each with a superintendent and business manager.

The study makes the following recommendations to the Governor and the Legislature

- Restore Chapter 70 state aid foundation to 2002 levels (the highest) and adjust for inflation each year.
- Appropriate 100% of Chapter 71 state transportation funds.
- Restore multi-year incentives for regional districts, continue allocation of state funds for regionalization studies, allow the transfer of state financed school buildings for other town purposes or the forgiveness of debt on closed buildings if needed.
- Restore state funding of MCAS summer and after school remediation programs for schools with unsatisfactory passage rates and less than adequate yearly progress status.

The study also proposes the following strategies for promoting collaboration and improved readiness for college and careers:

- Appropriate funds to help all Education Collaboratives maintain and improve their usefulness to schools by appropriating at least 10% of staff costs as done in Connecticut and New York.
- Require all schools and districts to join the state Group Insurance Commission (GIC) unless they can provide similar economic efficiencies.
- Place a cap on school choice.
- Cushion the impact of Charter Schools on local budgets.
- Extend broadband to rural communities and implement 1:1 for students and teachers.
- Assist the county high schools willing to expand Dual Enrollment/Early College with Greenfield Community College.

- Finance a Readiness Center in Franklin County with the help of UMASS Amherst, the state colleges, GCC, and existing teacher centers in Western Massachusetts.
- Set a target of reducing state reporting requirements.

2015 Long-Range Planning Recommendations

1. Share School Buildings, find alternative uses
2. Produce Alternative Energy for Heating, Electricity, and Revenue Generation (Potential 30-year Savings for Mohawk, Buckland-Shelburne, and Colrain schools alone is \$5.3 Million)
3. Pursue Full Reimbursement of Regional Transportation Costs from the State
4. Conduct Student Exit Surveys, build student retention plans
5. Advocate for Incorporating a “Rurality” Factor in Chapter 70 State Aid Formula
6. Enhance On-The-Ground Familiarity of School Committee Members with the District’s Operations
7. Support the Drive for High-Speed Internet Access
8. Proposed Changes
9. to the Regional Agreement

2016 BEST Committee Recommendations

- Phase 1 (to be accomplished in time for September 2017) – Work cooperatively with the Heath Education Task Force to implement a strategy for the education of all Heath students (PK - 6) that allows for the closing of Heath Elementary School and the return of that facility to the Town of Heath for re-use.
- Phase 2 (to be accomplished in time for September 2018) – Expand the Mohawk Middle School to include all 6th grade students on the Mohawk campus.
- Phase 3 (to be accomplished in time for September 2019) – Collaborate with member towns to redistrict and consolidate elementary students (PK to Grade 5) into two schools, creating two new learning communities at the current Buckland Shelburne Elementary and Sanderson Academy sites.
- No later than December 31, 2017 – Complete an in-depth analysis of the financial feasibility of constructing a new elementary school (or addition) on the Mohawk campus to maximize the operational efficiencies and educational advantages inherent in having all resources in a single location.

While the phases resulted in priorities, we will note that a total of 9 scenarios were explored, with associated price tags:

1. Grade PK-2 remain at existing ES, Grades 3-5 consolidated at BS, Grade 6 to MT (\$530k);
2. Grade PK-2 remain at existing ES, Grades 3-5 consolidated at BS and Sanderson, Grade 6 to MT (\$682k);
3. Heath closes and they send PK-6 students outside district, PK only at Colrain, BS & Sanderson offer PK-5, Grade 6 to MT (573 to 968K);
4. Heath closes and they send PK-6 students outside district, PK-2 only at Colrain and Sanderson, BS offers PK-2 and consolidated 3-5, Grade 6 to MT (\$605 to 1MM);
5. **All Grades pre-K to 5 consolidated into a newly constructed centralized facility (or wing) on the Mohawk campus, all Grades 6 students transition to the Mohawk Middle School (Grades 6-12 at Mohawk), Heath sends kids to district (\$1.23MM);**

6. Grades PK to 5 at BS, Heath, Colrain and Sanderson, BS also becomes a Middle School for all Grades 6 to 8, Mohawk retains Grades 9-12, using former Middle School space for expanded career/vocational programs, Heath sends kids to district (\$250-300k).
7. Heath closes and they send PK-6 students outside district, PK-5 remain at Colrain, Sanderson and BS, Grade 6 to MT (\$292 to 692k); **3A. Heath School closes and Heath elects to send the town's PK-6 students outside the District, Colrain closes, all Grades PK to 5 consolidated at BS and Sanderson, Grades 6 students transition to the Mohawk Middle School (Grades 6-12 at Mohawk) (\$810 -1.2MM);**
8. All Grades PK-5 at renovated/expanded BS, all Grades 6 students transition to the Mohawk Middle School (Grades 6-12 at Mohawk), Heath sends kids to district (1MM);
9. All Grades PK-2 at one Early Learning Center (BSE), all Grades 3-5 consolidated at Sanderson, all Grades 6 students transition to the Mohawk Middle School (Grades 6-12 at Mohawk), Heath sends kids to district (\$1.1MM).

2022 Phase I MARS Report Facilities and Educational Program

- Move the 6th grades to MTRS (consistent with BEST report)
- Consider the closure of Colrain Central
- Consider the closure or rebuilding of BSE
- Consider the closure of Colrain and BSE and consolidation of PreK-5 students at the MTRS campus (consistent with the BEST report).