

FINAL REPORT AND RECOMMENDATIONS
Amherst-Leverett-Pelham-Shutesbury
FOUR-TOWN K-12 REGIONALIZATION STUDY COMMITTEE
June 26, 2010

COMMITTEE CHARGE

The work of this committee began in response to pressure from the Commonwealth for smaller districts to consider consolidation as means of achieving improved educational capacity and financial savings through economies of scale. It is important to note that the impetus for this work was based on financial, not educational, considerations. The Commonwealth was asking districts that it defined as “smaller” to consider forming comprehensive regions to provide both primary and secondary education. Franklin County, which includes two of the four towns in the Amherst-Pelham Regional District, was deeply involved in these discussions. Under the leadership of Senator Stan Rosenberg, a commission to examine various options including county-wide regionalization was created. At that point, there was talk of enforcing a minimum standard of 5000 students per district. Senator Rosenberg encouraged Franklin County communities to be proactive in studying new partnerships and collaborations, and not wait for directives to come down from the state level. Representatives from Leverett and Shutesbury were concerned about that process and felt that if regionalization was going to be forced, it made sense to consider whether to build on the existing partnership with Amherst and Pelham. Our region had missed the opportunity to apply to the Department of Education to support a formal process to consider regionalization, but that did not preclude the formation of a committee that could function without a grant.

Close on the heels of this state pressure, Alberto Rodriguez, the newly hired superintendent, commissioned a management study of the Amherst-Pelham schools. The “Hamer report” was completed in the summer of 2009. It stated that the schools in the Amherst, Pelham, and Region districts were not closely articulated with regard to curriculum, assessment, reporting, operational efficiencies, and programmatic priorities. The report further suggested that the location of grade six in each of the elementary schools contributed to overcrowding in some of the Amherst elementary buildings while the regional middle school building was underutilized. The proposal of moving the sixth grades to the Middle School posed complications for other towns in the region. For example, Shutesbury’s elementary school population declined from 225 to 154 in recent years and the school is not overcrowded. The suggestion to send sixth grade students to the region was not well received in Shutesbury and Leverett.

The Regional School Committee formed this Regionalization Study Committee in December 2008 to examine the educational and efficiency benefits of various regional and collaboration options.¹ It was understood from the outset that the “Regionalization” in the title of the Committee was shorthand for "Reconfiguration" allowing for examination of options other than forming a single K-12 Regional School District for the four towns. Since the towns are already

¹ The memorandum from the Regional School Committee is provided in Appendix A

regionalized in grades 7-12, the committee concentrated its focus primarily on various combinations of schools at the K-6 level and their impact on fiscal and educational effectiveness. It was also evident that governance issues would be another key criterion. Amherst is larger than the other towns and supplies over 75% of the Region's students, so issues of each town's "local control" over its elementary school(s) and representation in multi-town decision-making bodies were challenging.

COMMITTEE MEMBERS

The Regional School Committee invited each town's select board, finance committee, and school committee to designate representatives to the regionalization committee. The towns were represented as follows:

Amherst

Alisa Brewer—Select Board
Andy Churchill—School Committee
Andy Steinberg—Finance Committee

Leverett

Don Gibavic—Finance Committee
Farshid Hajir—School Committee
Tom Powers—Finance Committee

Pelham

Jim Huber—Select Board
Michael Hussin/Kathy Weilerstein—School Committee
John Trickey—Finance Committee

Shutesbury

Al Springer/Rebecca Torres—Select Board
Marianne Jorgensen/Michael DeChiara—School Committee
Elaine Puleo/Eric Stocker—Finance Committee

The committee was supported by significant staff work by Rob Detweiler, Maria Geryk, Alberto Rodriguez, and Debbie Westmoreland.

CURRENT SITUATION

Amherst, Leverett, Pelham and Shutesbury participate in a regional district to provide educations for grades 7-12 and maintain separate districts to provide elementary education at grades K-6. Our Towns share more than our secondary schools. The university and the colleges create a community that is committed to quality education and wants our children to have unlimited opportunities for success, including access to the best colleges and opportunities for success after their public education is completed. We therefore strive to support the regional schools and have elementary schools that prepare students to succeed in the Middle and High School. The regional schools need all incoming students to be equally prepared to succeed in grades 7-12.

As a region, our schools are one enterprise. At the same time, we have a history that values the uniqueness of each town and gives them stronger identities, more power, and more responsibility than neighborhoods have within cities. That uniqueness is effectuated through the elementary schools that are also community centers and expressions of each town as a community. Our challenge is to meld these apparently conflicting values – the common commitment to education of four towns that need to work together to succeed and the local identity of each town as expressed through its elementary school(s).

All four towns participate in a Region for grades 7-12.

- 1,661 students from four towns come together in one middle school (grades 7-8) and one high school (grades 9-12)
- Single superintendent/central office
- Single budget voted on by all town meetings
- Single 9-member school committee with representatives from all towns. Representation on the Amherst Pelham Regional School Committee is Amherst – 5, Pelham -2, Leverett- 1 and Shutesbury -1.

Amherst and Pelham participate in Union 26 for grades K-6

- Amherst has 4 elementary schools (3 in 2010-11) serving 1,321 students
- Amherst is larger and has more diversity than the other towns under many measures
- Pelham has one elementary school serving 125 students (47 from other towns through school choice)
- Superintendent/central office costs shared with Region
- Two elementary school committees – one for each town
- Two elementary school budgets, each voted by town meeting
- 6-member Union 26 school committee (3 members from each town’s school committee) jointly hires superintendent with Region school committee

Leverett and Shutesbury participate in Union 28 for grades K-6 with Erving, New Salem, and Wendell

- Leverett has one elementary school serving 165 students (28 from other towns through school choice)
- Shutesbury has one elementary school serving 154 students (no school choice students)
- Separate superintendent/central office – costs shared among the five towns
- Four elementary school committees (New Salem and Wendell are unified, a district within a union)
- Four elementary school budgets, each voted by town meeting(s)
- 15-member Union 28 school committee hires superintendent; 3 members from each town’s school committee

METHODOLOGY

In analyzing the potential savings and costs for a different organization of elementary education in the four towns, the committee considered four practical cases.

- I. Expand Union 26 to include Shutesbury and Leverett
- II. Expand the region to include Kindergarten through high school (K-12)

- III. Expand the region to K-12 with closure of the Pelham Elementary School
- IV. Take other actions within the current structure to improve articulation and achieve operational efficiencies

Case I - Expand Union 26 to include Shutesbury and Leverett

In a four-town union, each town would continue to have a school committee and elementary school(s). Each School Committee would provide policy direction to the Superintendent, maintain its own school budget; separate reports would be provided as required to the Department of Elementary and Secondary Education (DESE) by each elementary and Region district.

Cost effectiveness. Because the present situation consists of two superintendency unions (Unions 26 and 28), it is not surprising that the cost savings from this Union-based approach are minimal. The Union 26 Superintendent and central office staff would work with two additional School Committees, Finance Committees, and Town Meetings. This would require additional central staff, possibly a new Deputy Superintendent, but funds currently spent by Leverett and Shutesbury to support the Union 28 central office would come to Union 26 in this new configuration. A subcommittee, working with Rob Detweiler, Director of Finance and Operations, estimated the additional cost to Union 26 administration to be \$204,000. Leverett and Shutesbury presently expend \$213,000 to participate in Union 28. An expanded Union 26 may create Special Education cost efficiencies for Leverett and Shutesbury that don't exist now.

Educational effectiveness. This option would provide a single administration for all of the schools in the four towns, creating the potential for a mechanism to smooth efforts toward greater articulation, cohesiveness, and coordination. Professional development for elementary school faculty and staff would be shared, increasing coordination, providing some additional efficiency, and increasing collegiality of faculty and staff at the elementary schools. Having one Superintendent for elementary schools and the region in all four towns would enhance communications among the School Committees. An additional advantage over the present structure is that there could be a coordinated approach to Special Education among the elementary and secondary schools, achieving desired results at a lower cost

Having one Superintendent administer all elementary schools in the region in place of the present structure with two superintendents, each administering the elementary education in two of the four towns, could lead to less variety in the approaches taken. This may be the other side to the advantages of increased articulation recommended in the Hamer report. One Superintendent working with five districts could be less responsive to the particular needs of each district. While Amherst and Pelham currently have one central office and Superintendent, this structure by itself has not guaranteed alignment and coordination between Amherst and Pelham elementary schools or among the elementary schools in Amherst. Having the elementary schools of the four town supported by one central office will not assure alignment; it will create the potential for implementing alignment in a coordinated way.

Governance. There are transition and legal issues with the implementation of this option, if it is pursued. Assuming that current law and the DESE would support this reorganization, the School Committees would need to agree on the role of the Union 26 school committee. One town is

much larger than the other three but all towns will continue to be committed to the unique needs of their respective communities and will expect to participate in the selection and evaluation of the Superintendent who will assist them to develop policies to meet those unique needs and implement those policies. State law (M.G.L. Chapter 71, Section 63) specifies that a school union committee includes the chair and two other school committee members from each town with a school committee of three or more members.

Case II - Expand the region to include Kindergarten through high school (K-12)

A unified regional district for elementary and secondary schools (K-12) would terminate the four separate Town School Committees, dissolve Union 26, and require Leverett and Shutesbury to withdraw from Union 28. When the committee commenced its work, it appeared that the state Department of Education was encouraging and might require this form of full integration of elementary and secondary education. The committee endeavored to consider the economic, educational governance, and legal costs and benefits.

Cost effectiveness. The subcommittee that considered the financial implications to the various cases estimated that the additional regional administrative expense would be the same as estimated for Case I (the expansion of Union 26): \$204,000. When the full committee received the subcommittee report, there were questions about whether potential efficiencies were not considered, including: (1) the reduction in the expense to support four town, one region, and two School Union committees, (2) the efficiency of operating a schools from a single budget and set of policies, and (3) being able to prepare and provide one batch of reports to the state instead of five.

State law, Chapter 71, Section 42b, requires that when a region is formed, “All such school personnel employed by regional school districts shall initially be placed on the salary schedule of the district so that compensation to be paid to such school personnel shall not be less than the compensation received by such school personnel while previously employed with the same status.” The legislature is presently considering further legislation that would regulate the process of adjusting from multiple labor contracts in separate districts to employment practices of a single district. If we presume that the eventual outcome would be to adopt the highest salary scale of any district participating in the consolidation, the additional salary expense was estimated to be \$159,000. The additional cost for a single K-12 district estimated by the subcommittee was \$363,000. This would be partially offset by the amount that Shutesbury and Leverett now pay to participate in Union 28 (\$213,000), as well as a reduced workload for Town Treasurers who now handle the school payroll, health insurance, and other employee benefits. The most significant unknown financial benefit is the amount of additional regional transportation reimbursement that would be available to the new K-12 region. The estimate was a range from \$130,000 to \$380,000. Therefore the additional funds that would be available (funds now supporting Union 28 plus additional regional transportation reimbursement) range from \$343, 000 to \$593,000. The subcommittee determined that the change in Special Education costs would be minimal. Depending upon the amount of transportation reimbursement provided by the state, the net result is that the subcommittee estimated that this option might cost an additional \$20,000 or save as much as \$230,000, plus any additional potential efficiencies that were not quantified by the subcommittee. It is important to note that the estimate for regional transportation reimbursement is based on recent historical data, but since the level of support for

this fund has fluctuated wildly depending on political considerations in Boston, the lack of certainty in this calculation poses a large question mark for any estimation of the financial impact of regionalization. As with much other supplementary funding for schools, the regional transportation fund has never been fully funded. In the fall of 2009, a significant cut to regional transportation was made by the Governor and reversed only through very heavy lobbying by local school committees and legislators. Thanks to the efforts of Senator Rosenberg and others, new legislation ensures that the regional transportation reimbursement cannot be cut by any percentage exceeding the percentage cut to Chapter 70 funding in a given year. The more favorable estimate of \$380,000 is based on the fund being supported at 85%. By contrast, the state is currently supporting the fund at only 52%.

The identified costs that can be estimated, the additional revenue that we can project – with a range for additional regional transportation reimbursement, and the net cost or savings are therefore as follows:

	Minum regional transporation est.	Maximum regional transporation est.
Additional administrative expense	\$204,000	\$204,000
Additional salary expense	<u>159,000</u>	<u>159,000</u>
Total additional cost	363,000	363,000
Current Union 28 cost	213,000	213,000
Additional transportation reimbursement	<u>130,000</u>	<u>380,000</u>
Total savings and new revenue	343,000	593,000
Estimated (cost) or savings	(\$20,000)	\$230,000

The committee concluded that potential financial consequences are significant but not sufficiently large to solely justify the regionalization option. As detailed below, in FY 2010, the four communities expended \$52,808,860 to educate children, elementary and secondary. Recognizing that the administrative savings might be underestimated for the reasons explained, if we assume the highest amount for additional regional transportation reimbursement we might save \$230,000, which is 0.4% of the FY 10 expenditure.

Amherst	\$20,381,768
Leverett	1,696,648
Pelham	1,320,687
Shutesbury	1,633,405
Amherst Pelham Regional Schools	<u>27,776,352</u>
Total	\$52,808,860

Educational effectiveness. This option would create a single administration and School Committee and facilitate cohesiveness and coordination among the elementary and secondary schools within the four towns now participating in the current grades 7-12 region. As with the first option, a four-town elementary region to coincide with the 7-12 region, this could provide more cost effective and shared professional development using more internal trainers and

increase faculty and staff collegiality. With a single school committee, this approach could provide a more efficient Special education program by creating the larger community of SPED students in a single district. A single K-12 region could enhance the coordination of curriculum and the sharing of information with the Middle School. It could decrease the administrative burden for school building staff and standardize administrative processes. There would be a common human resources policy and increased flexibility for the use of personnel resources. A single region would also provide opportunities to adopt different boundary lines for elementary schools, more efficient transportation, and more efficient use of these facilities.

As with the first option considered, a combined K-12 region would likely decrease the variety of approaches taken in elementary education. There was some concern that the combined administration, while being more efficient, would be less responsive. The potential addition of a deputy superintendent could increase responsiveness.

Governance. The greatest concern was the loss of local control that communities now have for the education of the youngest students in the system. Each town currently has an elected School Committee that oversees the education provided in from one to three elementary schools. The schools are significant assets to the community, both to provide cohesion and as community centers. The Regional Agreement could include a provision that would assure notice or require town approval to close an elementary school, though such agreements make district financial and education planning more difficult. To create a single K-12 region, there would be a significant challenge to determine how the School Committee is elected, by town or region-wide, with a need to consider fairness and not leave any community to feel disenfranchised. As with the current 7-12 region, the budget would have to be reviewed by four Finance Committees and approved by at least three of four Town Meetings. The nexus of trust between the School Committee and the Select Boards, Finance Committees, and voters would therefore become more important. Additional items requiring careful negotiation would be the ownership of the buildings as well as building debt obligations, and distribution of pension liabilities.

Case III - Expand the region to K-12 with closure of the Pelham Elementary School

A decision to close an elementary school is not necessarily a part of a decision to create a single K-12 region and the committee is not making such a recommendation. However, as Amherst recognized when it decided to close the Marks Meadow School after the 2009-10 school year, this is a means to significantly reduce costs if there is more capacity within a district than needed for the number of students. Therefore, we looked at an option to create a K-12 region with closing the smallest school, Pelham. As noted in the Case II description, regionalization could result in range of a modest \$20,000 increase in expenses to a decrease of \$230,000. The annual Pelham operating cost for the school building is \$220,000. As Amherst experienced, closing a school reduces salaries by eliminating some building-level administration and some teaching positions, by creating more efficiency in classroom assignments. The subcommittee estimate is that salaries and benefits would be reduced by \$186,000 resulting in a saving of from \$386,000 to \$638,000 per year. However, debt payments associated with the Pelham building complicate this picture.

Deciding to close an elementary school, either within a region or by a town's School Committee is difficult and emotional. All of the governance issues, the desire to feel represented,

community identity, and the need for continued community support are most apparent with the consideration of closing a school.

Case IV - Take other actions with current structure to improve articulation and achieve operational efficiencies

The fourth option, implementing no structural change, was evident to the committee but not considered during the process. We began in response to possible pressure from the state and recommendations from an external evaluation. The default was always obvious and the advantages and disadvantages were the opposites of the plus/minus factors for regionalization or expansion of Union 26.

Some improvements could be made to the current structure that would enhance coordination and communication, achieve some new efficiency, and enhance educational effectiveness by assuring that all students reach the Middle School with equivalent preparation and readiness to achieve in that setting. In other words, much of the coherence and alignment that are listed as potential advantages of the other three models could be attempted to be implemented by increasing the ties between the two Unions and especially the two Central Offices. Since one of the major initiatives within Amherst, Pelham and the Regional School Districts has been and continues to be Alignment of Curriculum, if this alignment effort encompasses conversations with Leverett and Shutesbury elementary administration and staff through coordination between the two central offices, there is great potential for achieving K-12 coordination of curricula, even within the current governance structure.

A recent successful example is illustrative. In 2008, the Middle School adopted Volumes 2 and 3 of the Impact Mathematics textbook for grades 7 and 8 respectively. Through a process organized by then-Curriculum Director Mike Hayes, all sixth grade teachers from the four towns came together to discuss the pros and cons of adopting the first volume of the series for grade six. When the decision to adopt Impact 1 was taken by the Amherst and Pelham Superintendent, an opportunity for complete alignment across all four towns' elementary schools was created because the principals, teachers, and Superintendent for Leverett and Shutesbury elementary schools were included in the process. All four towns have now adopted Impact 1 as their sixth grade mathematics textbook.

Whether or not any governance changes are pursued, this committee recommends that the Union 26/Region Superintendent and the Union 28 Superintendent explore establishing regular processes for alignment of curriculum and other collaborative efforts among faculty and administration of their districts.

All four towns recognize that fluctuating enrollment numbers may point to a change in the organization of our elementary schools in the future. The most obvious reasons are discussed in the section of this report below on Enrollment Trends and Budget Projections. If the structure remains with four School Committees that are not tied by a common administration, other mechanisms will be needed for planning at the elementary level to assure the continued availability of sufficient resources for strong regional secondary schools. Any result that

diminishes the ability of all towns to support the regional budget and prepare students to succeed at grades 7-12 is contrary to the needs of the children in all of our communities.²

TRANSITION CONSIDERATIONS

Cases I, II, and III introduce considerable issues of transition, which the committee did not explore in depth. However, we can at least outline some of them here. There would be considerable costs in restructuring at the central office in any of the three cases, as well as legal costs for deconstructing the agreements currently in place and creating new ones; the committee did not make an effort to estimate these. From this optic, the expansion of Union 26 is vastly easier than the regionalization models, however. This is so because unlike expanding the Union, regionalization would require intense negotiations of the financial assets and liabilities, including teacher and administration contracts, bus fleets, building ownership and debt obligation, pension liabilities, etc. These are not insurmountable issues, but the public should be aware that they would require significant movement of funds between the towns. To take the issue of building debt, for example, Shutesbury will no longer carry a school building debt after FY 2011, whereas Leverett and Pelham will each be paying approximately \$110,000 per year for a number of years and Amherst still owes approximately \$315,000 per year.³ The point is that the per pupil building debt of the towns varies significantly among the four towns and these considerations would be the subject of careful negotiations among the four towns.

ENROLLMENT TRENDS AND BUDGET PROJECTIONS

The committee recognized that the demographics of our communities and the financial resources available from taxation and state support for education and local government will affect the options for providing education in the region.

- In smaller communities, a small variation in the number of students has a substantial impact on the demands on our schools and the options.
- The Department of Elementary and Secondary Education projects state-wide decreases in enrollment of 2.7% for K-3, 4.4% for grades 3-6, 5.1% for grades 7-9, and 5.1% for grades 10-12 from 2010 to 2019. Of course state-wide projections do not necessarily reflect what will happen in any community. The four towns in our region are neither areas of significant growth nor communities with significant exodus and decline. Based upon the experience of the last decade, when enrollments declined in all four towns, and the aging population, there is no reason to believe that we can expect growth, and a decline in enrollment is more likely. When school choice students are excluded from the calculation of a declining student enrollment, this trend applies to all five current districts. Between 2003 and 2007, enrollment declined in Amherst by 203, in Shutesbury by 29, and in the region by 379. Leverett enrollment increased by 25 but has 28 school choice students. Without those

² The considerations for all four cases are summarized in Appendix B

³ See Appendix C

students, its enrollment would have declined. Similarly, Pelham enrollment increased by 14 but takes 47 choice students.⁴

- It is even more difficult to project Chapter 70 assistance than it is to anticipate enrollment. The state's ability to assist towns to provide K-12 education depends upon its resources, which have been affected by the economy and increasing resistance of taxpayers to support all public needs, including education. Health care obligations have commanded a growing portion of state revenues, a trend that is unlikely to diminish. Once they determine how much is available at the state level to support education, the legislature and Governor must consider the state formula to allocate the funds. To the extent that community wealth continues to be a factor, two of the smaller towns in the district are relatively disadvantaged.
- It is also difficult to project the capacity and willingness of voters in the four towns to support education with property taxation. Historically, voters have valued education and supported our schools. As taxes and the number of retirees increase, there could be a diminution of that support.
- While these revenue projections are clearly speculative, it is possible that we will reach a point when towns will not be able to support both their elementary schools and the regional secondary schools to provide the quality education that we desire. Towns will then be forced to make choices between supporting their elementary and the regional school budgets. Schools now are from 56% to 66% of the total town budgets in our communities.

As the economic crisis becomes long-term it is critical that the four towns continue to search for solutions. The regional educational program offerings have been cut significantly over the last six years. Lack of structural financial sustainability at the Region 7-12 is evident. Our elementary schools are struggling with declining budgets, declining enrollments, and increased competition from charter schools, school choice, private schools and home schooling. If one of the cases presented here is not embraced, it is critical that other scenarios be explored.

SUMMARY OF CONCLUSIONS FROM FOUR CASES

Four cases have been identified and studied from fiscal, educational, and governance perspectives. Though there are still some adjustments that could be made to the financial estimates, even generous interpretations of the savings would not constitute, on their own, an imperative for pursuing a change in governance structure at this time. The study of educational pros and cons was based on one subcommittee meeting of principals and administrators meeting with the chair of the committee. The committee acknowledges that an extensive study of the effect on delivery of education was not within the scope of this work, and a more detailed study of the pros and cons of the different models from the educational viewpoint would be useful. The Governance issues are clearly complex and numerous, and differing perspectives abound, even within individual towns. Transition costs for cases I, II, and III would be significant, but were not studied in detail here, with case I presenting the fewest obstacles. Leaving aside any political pressures internal or external, the economic and demographic conditions are such that the Towns, recognizing the strong ties that bind them educationally, should continue to converse

⁴ An analysis of enrollment history is presented in Appendix D. The Massachusetts School Building Authority provides enrollment projections. This committee did not have the opportunity to analyze those reports to determine whether they provide data that is useful for this process.

with each other to find strategies that will ensure the delivery of a high quality education at an affordable cost.

OBSERVATIONS

As we continue this process, we need to better define the economic and educational costs and benefits to expansion of Union 26 to include all towns in the current region, expansion of the region to include grades K-6, or other alternatives that might be suggested. The four towns must be prepared to plan and implement changes that will best meet the education needs of all students in the region as resources and needs change and assure the long-term financial viability of the current region and the elementary schools. Any option that is considered should be assessed for its capacity to adapt as circumstances require. All such discussions will require building trust and an environment of mutual respect if they are to be productive.

In order to formulate next steps, it is important to identify the different sources of impetus for any further work in examining governance structures of the schools of Amherst, Leverett, Pelham, and Shutesbury.

On a larger scale, there is definite pressure from the Executive Office of Education, Department of Elementary and Secondary Education, and Legislature for a reduction in the number of school districts in the Commonwealth. Even though these pressures wax and wane, they are not likely to vanish entirely anytime soon. At the Municipal Conference in Northampton in March, Secretary Reville said that he is not interested in pushing the Regionalization agenda, but Commissioner Chester continued to question the wisdom and fiscal efficiency of Franklin County school districts and contrasted them to city districts with only one Superintendent but having the same number of students. At the same event, however, House Education Committee chair Marty Walz said that in collaboration with Representative Chris Donelan, she was going ahead with the development of a Regionalization bill, which she has now filed (redraft of HB3874).⁵ Certain provisions of this bill were already included in the Municipal Relief Bill, currently in conference committee. Thus, the pressures from the state are considerable, and real, especially for districts that participate in a Superintendency Union, are “split” (i.e., not K-12), or are small (fewer than 1000 students). All of our districts, therefore, have two strikes against them under these criteria, and most have three.

On a more regional level, there are pressures for the breakup of Union 28, both external and internal. Internally, some public officials in Shutesbury, though they are generally happy with the operations of their school and consider it well-run, have expressed the desire to be in a situation where they have more direct oversight and control over the Superintendent of their elementary school. In the Spring of 2010, the Shutesbury School Committee and Select Board jointly created an Education Study Committee to study the past, current, and future educational experiences of their K-12 students, with the goal of preserving excellence of education provided in the face of increasing fiscal constraints, changing demographics, and technological innovation. With community input, the committee seeks to develop a document that will be used to guide future decisions with respect to organizational configuration with a clear mechanism for ongoing

⁵ A copy of this proposed legislation is included as Appendix E. Relevant sections of current law is included as Appendix F.

reflection and evaluation. Leverett officials have expressed much less enthusiasm for switching to a different central office or a different governance structure. The Leverett School Committee is largely happy with the current governance structure, considering its school very well-run, with good outcomes, but recognizes the importance of participating in the conversation and thinking creatively about possible reconfigurations. In terms of external pressures, one of the schools in Union 28 (Swift River, serving the towns of New Salem and Wendell) sends its students to the Mahar Regional district, which has been actively pursuing an expansion into the elementary level. Thus far, the New Salem-Wendell School Committees are adamantly opposed to joining Mahar. Nonetheless the existence of that pressure that could lead to the exit of two towns from Union 28 is a concern for the other towns, just as the existence of this Regionalization Committee is a source of concern to the officials from Erving, New Salem and Wendell.

The third pressure, and the one that is in some sense the most important and the most real, is the possible decline in enrollment and financial pressures described in the previous section of this report. As experienced by virtually all districts in the Commonwealth, enrollments have been decreasing for a number of years; more recently, decreased funding as a result of the downward economic pressures on state finances have further pushed budgets downwards. The Pelham, and to some extent, Leverett elementary schools have used the School Choice program to boost enrollment, a strategy which has proved quite successful. For both of those schools, the number of school choice students has increased in recent years, dramatically so in the case of Pelham. As discussed elsewhere in this report, this has raised questions about the future viability of the Pelham School. Especially since the Pelham school is considered a “gem” and is demonstrably so using any number of qualitative and quantitative measures, it is imperative not only for the Town of Pelham, but in the interest of all four towns in our Regional district, to consider the future of the Pelham school in our discussions. Additionally we should consider the possibility that if the Pelham School building is no longer used as an elementary school, it might be rented or sold to a charter school. That outcome would further impact the financial and educational stability of our public schools. If the facility were utilized for example as a magnet school to augment the offerings of the four town it might draw back students we are now losing to charter schools, blunting the financial threat we now face.

It is important to acknowledge that while all four towns share a common desire to participate in the conversations surrounding governance change, they all have different perspectives and desires (which are by no means homogeneous with the towns or within the committees and boards). For Pelham, preservation of the fiscal health and educational vitality of the Pelham elementary school (the smallest in the four towns) provides ample motivation for participating in 4-town conversations. To some extent, the desire on the part of Leverett and Shutesbury to continue to be involved in future discussions about governance changes stems from: 1) the desire not to be forced into a break of the regional agreement with Amherst-Pelham because of a vast consolidation of Franklin County School Districts enforced by the state; 2) the desire to be prepared for any other pressures brought to bear on small districts to consolidate, including the possible enactment of a law such as proposed in HB3748; 3) the desire to be prepared for a possible breaking-up of Union 28 via the exit of one or more of the Union 28 members using Section 6 of the Achievement Gap Act; 4) the desire to be engaged in thoughtful discussion about the long-term educational and fiscal health of their elementary and secondary schools. Since citizens of the small town are in general happy with the functioning of their elementary schools, they would want to see demonstrated educational and fiscal benefits which are not

merely based on the theory and the possibility of gains in the distant future for any proposed reconfiguration plan.

For Amherst, regionalization discussions began with a desire to build a more streamlined structure that would aid in alignment, cohesion, and cost efficiencies and enhance the financial stability and quality of its elementary and secondary schools. In recent months, the Amherst School Committee has engaged in its own review of the Union 26 agreement, voicing its concern about the voting structure of the Union in appointing and evaluating the Superintendent. The Union 26 committee provides equal votes to each Town, as required by statute, despite a great difference in the sizes of the Towns and the numbers of elementary students. The Amherst school committee obtained a legal opinion to understand its options, including withdrawal from Union 26, and deliberated on a report from its Vice Chair outlining an analysis of pros and cons of continuing to participate in Union 26. These discussions took place in isolation of the work of the Regionalization Study Committee.

Finally, we must also consider the very real possibility that declining enrollments and reduced funding from the state may put the towns in a difficult position of having to choose between underfunding their preK-6 schools or underfunding their 7-12 schools. Sustainable financial support for schools is an essential component in continuing educational effectiveness. Town Select Boards and Finance Committees (representing the Town Meetings), are necessary partners in this discussion. Since all four towns are connected by participation in the 7-12 Regional School District, the fates of our preK-6 schools are inextricably linked as well. We all share the desire to support the Regional School District budget at the level that maintains the high quality we have come to expect.

CONCLUSION

For all of these reasons, this committee recommends that the Select Boards, Finance Committees, and School Committees of all four towns continue to consider how we approach our work together to achieve the following goals:

- Work together as a community committed to quality education
- Assure adequate funding and support for the Regional Middle and High Schools
- Assure that all elementary students are prepared to succeed at the Middle School and High School
- Prepare to adapt to changes required because of any of the factors cited above.

We are four separate towns as well as a region and planning must occur at both levels. We urge each of the four towns to have a process whereby the citizens of that town can discuss among themselves -- on a broad level involving School Committees, Select Boards, and Finance Committees -- what is in the best interest of their town.

While this Committee requests that the Regional School Committee accept this report and consider the charge to our committee as completed, we also recommend that the School Committees, Select Boards and Finance Committees of the four towns create Education Study Committees for the purpose of seeking each town's public input on these matters. We also recommend the creation of a *Four-Town* Education Study Committee with the same type of composition as our committee for promoting dialogue between the towns. The work of the

proposed town-based Education Study Committees will inform the members of the proposed Four-Town Education Study Committee, which will serve to promote increased understanding and enhance the likelihood of broad-based support for its recommendations. The composition of and charge to the Four-Town Education Committee should receive careful consideration by the Regional School Committee as well as by the School Committees, Select Boards, and Finance Committees of the four towns. It is hoped that this report will serve as a useful reference for future work on these issues.