

## **Regional Planning Study Results**

For over sixty years, the Massachusetts Board of Elementary and Secondary Education (ESE) has endorsed guidelines and framed policies to encourage the formation of regional school districts. In lean times, the state and often local educational leaders have promoted regionalization as a means to provide more cost efficient educational programs and services. During other more prosperous periods, local control has prevailed. ESE's recently issued "School district consolidation in Massachusetts: Opportunities and obstacles" ("School district consolidation" brief) outlines the reasons behind the state's support of regionalization, provides the historic context for this support and summarizes the long standing opportunities and obstacles. The following report summarizes the individual results of recent planning studies in the context of the district's existing affiliations and compares the current findings with concerns and benefits that have been identified in the past.

### ***Planning Initiatives:***

Regionalization is once again a topic of intense discussion and Governor Deval Patrick's Readiness Project highlighted it among efforts to strengthen district capacity to meet rising academic performance expectations. Over the last year 58 towns across the state have undertaken studies to explore the formation of new or expanded academic regions; another 47 towns are involved in vocational regional expansions. Many of these studies were supported through state planning grants awarded in FY09. Other districts were motivated by declining enrollments, streamlining governance, school construction incentives and/or broadening educational opportunities. The district studies provide current information on the advantages that a regional district may offer, but also outline the issues and challenges that still must be resolved if the Commonwealth would like regionalization to become a more viable option.

### ***Planning Study Process:***

Planning studies were initiated locally and focused on areas of most concern to school and municipal officials in each locality. Districts had different starting points as some had been in discussion for some time, others already had some management and governance connections and some started from scratch. Some studies provided a more in depth review, while others covered broader topics typical of an initial review of issues. Districts choose their own consultants to assist them in this process. Consequently, the studies are not consistent in form and substance, yet they detail certain consistent issues.

### ***Historic State Policy Initiatives***

Since the Regional School District law was first enacted in 1949, fifty six regional academic districts have been established. Of this number, fifty-five continue to operate. Over this same period, many other regionalization efforts failed. State financial incentives provided the impetus for many of the successful efforts; however, many efforts failed despite the availability of significant amounts of state funds. Regionalization efforts have succeeded and failed in the past for reasons that have been well documented. (Appendix A) Merging independent districts with

different goals, objectives, school committees, personnel, school buildings and economic ability can be a daunting challenge. Maintaining an alliance once made is also a challenge but one that has been met successfully by the fifty-five regional districts that have remained in operation for over sixty years.

Some challenges to regionalization derive from the state's tradition of local control, while others derive from long term district affiliations shaped by state policy efforts after World War II. A study commissioned in the late 1940's highlighted the fact that more than two thirds of the towns in the state provided no high school facilities or maintained a high school with fewer than 200 students in facilities totally inadequate to modern educational standards. In response, the General Court enacted the School Building Assistance Act to provide state reimbursement to defray the cost of school construction and the Regional School District Law to allow multiple towns to form a school district and construct a joint school building. In implementing these laws, early policy makers made two important decisions. The first was to eliminate small, inefficient secondary schools and the second was to encourage regionalization through financial incentives rather than by state mandate. Coupled with the fact that towns picked their own alliances, these policies allowed many towns to regionalize only at the secondary level and incidentally created pockets of small independent school districts across the state that remained autonomous. When their neighbors regionalized, these districts now have more limited options for partnering.

The emphasis on secondary regional districts has meant that many students attend two different school districts over their K-12 education governed by different school committees with their own priorities and educational goals. Sometimes little or no curriculum articulation exists between the elementary and secondary level and duplication of effort distracts administrators from a primary focus on educational policy and instruction.

In addition, 30 regional vocational school districts exist, governed, administered and funded separately from the academic districts. Close to 300 cities and towns are members of vocational regional districts. The regional vocational structure creates options for students but also another layer of management and governance.

Affiliations developed between and among towns were formed based on geographic considerations as well as on policies and legislation enacted over the last sixty years. Existing local affiliations, past rejections of regional partnerships and community perceptions of their neighbors' willingness and ability to support education drive local decision making and influence current attempts to promote regionalization.

### ***Current Configuration of Districts in Massachusetts:***

Much of the effort devoted to regionalization in recent years has encouraged regionalization of small independent districts and promoted full K-12 regionalization among towns that participate in regional secondary districts. Over one third of the 299 academic districts have fewer than 1,500 students. The majority of these districts are those that serve only partial grade ranges – regional secondary districts and municipal districts serving only elementary students.

<b>No of Districts</b>	<b>Type of Academic District</b>	<b>Less than 1,500 students</b>	<b>Participating Towns</b>
177	Municipal School Districts - operate K-12	24	177
31	K-12 Regional School Districts	8	92
19	Partial Regional Districts (5-12, 6-12, 7-12, 9-12)	10	53*
72	Elementary Districts	67	78
	Non Operating District – tuition out K-12	4	4
<b>299</b>		<b>113</b>	<b>404</b>

\*These 53 towns are duplicated in the count since they maintain their own elementary district as well as being members of a secondary regional district.

Various studies and reports have advanced arguments about the ideal number of students for an efficient school district. This paper does not argue the merits of a specific enrollment number but rather identifies districts of 1,500 students or less to be consistent with other recent analyses and because most districts actually involved in voluntary regional planning efforts are in this enrollment range.

Districts participating in recent planning studies fall into five broad categories of affiliation described in the “School district consolidation” brief. Common issues arise in each affiliation category and the planning study results have been grouped accordingly. Some issues impact all groupings, but many opportunities, benefits and challenges vary depending on a district’s current administrative and governance status. This table lists the studies by category and includes the number of towns, districts and school committees involved in each grouping. If these regional plans were to come to fruition, approximately 30 districts and 40 school committees would be eliminated.

*Planning Districts by Category*

<b>K-12 Unions</b>	<b>Tuition</b>	<b>K-12 Groups</b>	<b>K-12 Districts</b>	<b>Vocational</b>
24 Towns	5 Towns	11 Towns	18 towns	47 Towns
21 Districts	5 Districts	14 Districts	10 Districts	4 Districts
26 Committees	5 Committees	17 Committees	11 Committees	4 Committees
<b>Frontier*</b>	<b>Ayer-Lunenburg-Shirley*</b>	<b>Boxford Middleton Topsfield*</b>	<b>Hadley-Hatfield*</b>	Essex Aggie/ N. Shore/ Peabody
<b>Holland-Wales - Tantasqua*</b>	Berkley-Somerset	<b>Ralph C Mahar*</b>	<b>Berkshire - S. Berkshire- Lee-Tyringham*</b>	<b>Westfield*</b>
<b>Mohawk – Hawlemont Rowe*</b>		Amherst-Pelham	<b>Chatham-Harwich*</b>	
<b>Nauset*</b>			<b>Greenfield-Gill-Montague*</b>	
Freetown-Lakeville			Provincetown	

\* *Planning grant recipients*

**K-12 Superintendency Unions (Union):** Twelve regional school districts share the same central office staff with thirty seven elementary districts through unions. Individual school committees serve the 12 unions, 12 regions, 34 towns and 3 elementary regions.

Towns in this grouping maintain their own elementary districts, are members of a secondary regional district and share K-12 administrative services through the union. Over time, some towns in unions recognized the benefits of shared services and subsequently formed or expanded a regional district. Other towns remain satisfied that the union allows them to share costly administrative services while maintaining local autonomy. Final reports filed by some of the K-12 Unions found that districts perceive that there is less advantage to a K-12 regional district when there is already a shared administration. The administrative leadership works hard to coordinate curriculum, professional development and other educational services among the member districts. The members receive the cost benefit of shared services while maintaining local identity and pride and control over elementary grades, school buildings and budgets. Union leadership must respond and react to all of the needs and desires of the participating school committees, maintain separate budgets, prepare multiple reports and attend multiple meetings with school committees, parents, town leaders and others, but town residents do not consider the increased demand on administrative time as a sufficient reason to approve expanded regionalization. Elementary schools in small towns are a center of community activities and vital to the identity of the towns. Residents view abdicating control to a centralized regional district where decisions on funding, staffing, favorite programs or activities or even the continued operation of the school building are made by a school committee on which they have a limited voice as a tremendous hurdle.

The opportunity for increased capacity and streamlined services is outweighed in instances where equalizing teacher salaries and benefits would substantially increase annual operating budgets. New collective bargaining negotiations that often result in salaries being raised to the highest level among the member districts is a major barrier to regionalization efforts but particularly troublesome for those districts that are already regionalized at the secondary level where salaries have already been raised to the members' highest level.

For union districts that can overcome financial and local control issues, the actual dissolution of a union and the expansion of a secondary region to include grades K-12 can be less daunting than the merger of independent districts, since there is already a centralized administration and some coordination of services. The most obvious difference to residents would be the make up of, and charter of, a new school committee.

### **Union Studies:**

The *Freetown-Lakeville* secondary region hired a consulting firm to study the advantages and challenges of consolidating into a single PK-12 Regional District. The study found that the three districts already have a unified PK-12 curriculum and a single teacher pay scale. Since all three districts share the same central office

staff, there would be no significant administrative savings or additional costs. However, if duplicative functions were eliminated, the consultant estimated that the superintendent and three district level administrators would have 30% more time to spend on supervision, evaluation, and planning activities relative to the mission, educational programs, and efficiency of the district. Greater efficiency in the use of school buildings, classrooms, staffing, collective bargaining and transportation could be realized without the present duplicative restrictions of three separate school districts. As an example, the Austin School in Lakeville was renovated within the last five years with the intention of serving students in grades 3-5 from both towns through the region. Currently this building is only serving grade 5 students from Lakeville, while Freetown elementary remains crowded. This building cannot be used as planned since the region only has jurisdiction over grades 5-12.

There would be increased transportation reimbursement and possible additional incentive points through the Massachusetts School Building Authority (MSBA) for a school construction project under a regionalized structure with no substantial increase to teacher salaries because of the unified contract. Despite these benefits, the towns continue to be stymied by local control, finances and long standing issues of trust and credibility with the region.

**Frontier** is a secondary regional district comprised of four towns. The total K-12 enrollment for the five districts is less than 1,500 students. The regional district received a planning grant to explore K-12 regionalization in order to improve operational efficiency. The study results indicate that it would cost the member towns \$444,244 under a K-12 regional system if salaries and benefits were increased to the highest member district level. The planning committee was willing to explore a K-12 Frontier Regional structure but was unwilling to expend additional funds to increase salaries with no appreciable educational benefit and no offsetting costs savings that might be realized if consolidating central office staffing or closing a school building. Although there would be increased transportation aid and streamlined central office activities, these advantages did not compensate for the additional cost and the perceived lack of focus on elementary programs under a K-12 district. Since the districts believe they already operate as a full region with centralized administrative staff, coordinated schedules and similar curriculum objectives, they envision few educational improvements under a K-12 umbrella. As high performing districts, expanded regionalization was not viewed as important to performance. The most significant impact is the likelihood that the central administration would have fewer meetings, less duplication of tasks and more time to focus on instruction and planning.

The committee did succeed in resolving concerns over town representation on the existing regional school committee. Realigning representation on the current Frontier school committee to comply with one person one vote was viewed as a major barrier to expanded regionalization. The committee would be interested in pursuing regionalization further if the financial hurdles could be overcome, however, concluded that the additional costs and the changes in town assessments make full regionalization untenable at this time. The committee voted to dissolve the

“regionalization committee” but to continue to explore other collaborative endeavors in order to improve program coordination among the member districts.

**Holland** received a planning grant to investigate the formation of an elementary region with the town of Wales. Both of these towns along with Brimfield, Brookfield, and Sturbridge are members of the Tantasqua Secondary Regional District and all districts share the same central office staff through Union 61. Holland and Wales each operate its own K-6 school district and each has one school building that is in need of replacement or significant repair. MSBA encouraged the towns to form a region in order to better utilize their existing buildings and take advantage of the increased construction reimbursement available to towns that regionalize. Under a K-6 region, the elementary school in Wales will become an early childhood center and the Holland elementary will serve grades 3-6. The long range plan anticipates one new school building to serve 370 K-6 students from both towns. Additional funds, if needed, to equalize salaries between the two towns, estimated at \$85,000, will be offset by state transportation reimbursement and the savings in town related administrative costs, which will be subsumed by the Tantasqua central office with no appreciable increased costs. All of these advantages prompted the towns of Holland and Wales to recommend the establishment of a two town elementary region to the voters this spring, 2010. They have submitted a regional agreement for ESE review.

**Tantasqua:** The Holland-Wales planning effort was expanded to include all five member towns of Tantasqua Regional. An enrollment decline in four of the member towns has begun to impact the secondary region. The smaller towns’ school buildings have fixed costs that increase per pupil spending when enrollments decline and there is no flexibility to share elementary programs or services. As an example, the cost for secondary special education is currently in the elementary district budgets. The study reported that there is greater opportunity to consolidate these programs and costs under a K-12 consolidation plan.

The challenges stem largely from the variances between teacher salary schedules and the percentage of employer support of health insurance in each of the separate school districts that ranges from 50% to 80% of the premium. Over time six different collective bargaining units and school committees have concluded their agreements tailored to the local needs of staff and the varying resources of each community. The study found that in order to equalize the disparities in these union contracts over \$1.5 million would be needed for licensed staff with a likely increase when other personnel salary and benefits are calculated. Although as a K-12 region, the district would be eligible for increased reimbursement to offset elementary transportation costs, the fluctuation of state transportation reimbursement and its recent decline is another factor.

The elementary districts have captured many of the administrative benefits of regionalization through the union. However, operating six separate school districts, with financial functions in five separate towns, governed by six

separate school committees challenges the resources available to the central office. Based on a review of the FY09 central office calendar, it was found that the district administration attended 600 local meetings. Streamlining this structure would provide administrators with more time to attend to improved coordination and articulation of curriculum, instruction and personnel development.

Since most of the estimated savings are elementary driven, the district also explored the formation of an expanded K-6 five town elementary region. A \$900,000 savings estimated based on a reduction in town administrative charges and increased transportation reimbursement would offset the estimated \$775,000 needed to level salary and health care premiums. The five member towns are continuing to study regionalization options, but to date have found both the decrease in state transportation reimbursement and the required salary and benefit increases to be prohibitive to this endeavor.

***Mohawk Trail*** is a K-12 Regional district serving eight towns and 1,150 students. The Town of Rowe operates a K-6 elementary school for 50 students, tuitions secondary students to Mohawk Trail Jr. Sr. High School and shares central administrative services with the regional district. The member towns of Charlemont and Hawley maintain a K-6 regional school district serving 108 students and are members of Mohawk at the 7-12 level and share central administrative services with the region. The purpose of this grant was to prepare a cost analysis and an amendment to the Mohawk Agreement to include the towns of Rowe, Charlemont and Hawley as full K-12 members. Rowe's elementary per pupil average in FY08 was \$18,826, Hawlemont's elementary per pupil average was \$13,993 and Mohawk's was \$15,772 for K-12. The analysis indicated that it would be disadvantageous to the other members to include Rowe as a member of the district and absorb the costs of operating and maintaining the Rowe elementary school at its current level. Based on the regional formula all towns would share in a portion of the operating costs on a per pupil basis with Rowe having the lowest share based on its enrollment. The analysis did indicate that it would be beneficial for Hawlemont to join Mohawk as a K-12 member and a cost and time benefit to the Mohawk administration to eliminate separate reports and budget preparation. There would be no major administrative or curriculum changes through this merger. It is anticipated that there will be savings in central administration to offset the increased costs needed to bring Hawlemont salaries to Mohawk's level. An amendment to the regional agreement was prepared to include the towns of Hawley and Charlemont as full K-12 members. The amendment was approved by seven member towns, but was defeated by Hawley at its May, 2009 town meeting by four votes.

***Nauset*** is a 5-12 regional district comprised of four towns. Nauset received a planning grant to explore several regionalization possibilities, including a K-12 Nauset district comprised of the four current members; a new K-5 region including as many of the current Nauset towns as wish to join or an expanded Nauset district that includes one or more towns beyond the current four. Nauset currently serves 1,436 students but enrollments are declining within the Nauset towns as well as other towns on the lower Cape. A main component of the study was to convene

workshops for lower Cape districts and towns to examine ways to improve efficiency and stabilize programs through expanded regionalization or collaboration. Three workshops were held to discuss ideas for coordination and/or regionalization of services. These workshops introduced the process and potential benefits of regionalization and prompted some districts to enter into their own planning studies. The neighboring towns of Chatham and Harwich are involved in a planning effort and Provincetown has formed a planning committee to explore regional options. Nauset is continuing to study the issue but is hampered by previous failed attempts and the towns' anxiety that a regional organization will not care for each town's children as well as a locally elected school committee. The superintendents of the lower Cape districts continue to meet bimonthly to share information and initiatives.

**Tuition Districts:** Eighteen towns maintain an independent school committee that tuitions out students to neighboring school districts. Four districts tuition out all of their resident students, while the remaining districts maintain elementary programming and tuition out secondary students.

Towns that tuition their students to neighboring districts have no voice in the governance or administration of the district where their children are educated. They merely arrange and pay for the tuition. Although joining or forming a regional district would restore a measure of local control, most of these towns would represent only a small voice on a joint school committee and in some cases could be charged a buy in cost to offset the capital costs of the school building(s) that had been paid for by the host district. These towns have generally not paid the same per pupil cost as the host district due to the fact that they have no voice in the educational process. The resulting increase in operating cost to equalize each town's contribution to the joint region and the capital cost charged to join is often cost prohibitive.

Regional or independent districts are often reluctant to accept a town whose enrollment would constitute a small percentage of the total enrollment, whose contribution to sharing costs is likewise minor, but whose representation on the committee cannot be less than one member and whose veto power over bond issues and the annual budget is equal to any other member town of whatever size. Accepting a town that operates its own elementary school with a high per pupil cost would be a financial disadvantage to the receiving district whose members would share in the high cost required to maintain a low enrolled school. A municipal district has little reason to regionalize and share control. As the larger town, they control the educational process, receive the benefit of an increased student population with supporting financial help and perceive little financial gain or educational benefit from formalizing this arrangement in a region.

If these obstacles can be overcome, the merger of towns that already share the same governance structure or teaching staff would not produce the same operational challenges as other groupings that must merge multiple governing and operating structures.



### **Tuition Studies:**

**Ayer** received a grant to support the cost of planning a K-12 regional district with the towns of **Shirley** and **Lunenburg**. Shirley operates a K-8 system and tuitions its high school students to the K-12 districts of Ayer and Lunenburg. This Regional Planning Board has been working for over two years to investigate the formation of a K-12 region. The perceived benefit would be stability of programs in all three towns experiencing declining enrollments, permanent affiliation for Shirley, construction efficiencies and increased offerings for students. With the encouragement of MSBA, the regional plan is designed to remove two older school buildings from use through the merger of the current Ayer and Lunenburg high schools and the current Ayer and Shirley middle schools. There are substantial differences in the fiscal ability and educational programs offered by these towns and understandable concern that regionalization with towns that may not have the same interest and ability to support education will compromise individual district programming. Despite these differences and after arduous work and compromise, the planning board determined that one positive regional model could be developed to the advantage of all members.

The planning board determined that a transition period was critical to the success of this effort in order to continue current school operations uninterrupted while at the same time establishing a new regional structure. When two independent districts merge, a new school committee is elected that must create a centralized administration with an accounting and financial capacity separate from town government. Curriculum plans must be aligned, school schedules and bus routes coordinated and a regional budget prepared. Each district now hires its own central office staff and has limited administrative capacity to continue on going school operations while at the same time to develop a new school district. On September 1, 2009 the Regional Planning Board voted against moving forward with a three town K-12 region due to lack of funding to support the transition period.

**Ayer-Shirley** With the vote by the Ayer, Lunenburg, Shirley Regional Planning Board to suspend further exploration of a three town regional district, the towns of Ayer and Shirley agreed to continue their efforts. The reconstituted planning board has revised the three town regional agreement to reflect a two town K-12 region that would serve 1,900 students. The construction plan envisions a combined middle/senior high school serving both towns with school buildings remaining in each town to serve the elementary population. The Board has submitted an agreement to DESE for review along with a transition plan. The planning board will be recommending town approval of the agreement and plan in March, 2010 and upon approval will use FY11 as a transition year during which time the individual school districts will continue to operate while the regional school committee is elected and begins to develop its administrative team to consolidate programs and operations. The Board is still hoping to secure transition funds, but at a reduced level as part of the plan involves sharing administrative staff currently employed by one of the two districts as the regional administrative transition team.

***Berkley and Somerset*** have formed a regional planning board to explore the formation of a 9-12 regional district. Discretionary funds were awarded to Somerset to support a financial analysis of a merger of these two districts at the high school level. Berkley currently tuitions its high school students to Somerset and is interested in having a voice in the education of its high school students. Somerset high school is in need of major renovation or replacement and is interested in MSBA's offer of increased construction funds available to towns regionalizing and would benefit from Berkley's contribution to the construction costs. The enrollment for a two town 9-12 regional district is expected to be close to 1,000, with Somerset students comprising 75% of the two town high school population. Since Berkley does not operate a high school, there will be no substantial operational changes under a regionalized system and, unlike other mergers; there will be no additional costs from merging collective bargaining agreements. However, the region would need to create a central office with administrative and fiscal capabilities separate from town government. The Board is currently exploring assessment options to mitigate major increases in either town's contribution to the region. Although this planning process is in the early stages, the perceived disparity between the two districts interest in and ability to support educational spending is a major stumbling block.

**K-12 Groups:** Twenty-one districts (20 towns and 1 elementary district) are members of a regional school district at the secondary level but maintain a central administration that is distinct from their member regional district. Some districts maintain their own administration for their elementary district; others have a separate elementary union while still others have a mixed affiliation and participate in an elementary union with districts that have different high school affiliations.

Elementary districts in this grouping have not recognized the benefit of sharing K-12 administration through a union or an expanded regional district. These districts have small enrollments and are reluctant to join K-12 regions for fear of losing the focus on elementary education and being subsumed by a regional entity removed from their geographic area. Some of these towns have partnered with other small towns through a union that has no direct affiliation with the district or region that serves their secondary students. These districts have a long history of cooperation based on geography and other local factors. Determining which affiliation most meets their needs has been an on going process over the years with no resolution.

**K-12 Group Studies:**

***Amherst-Pelham*** is a secondary regional district serving 1,763 students from four member towns. Amherst and Pelham maintain elementary programs, serving 1,405 and 81 students respectively and share central office staff with the region. Leverett and Shutesbury each have one school building serving 120 and 149 students respectively and share central office staff at the elementary level with Erving and the New Salem-Wendell Region. Erving has one school serving 279 students and tuitions its secondary students to the K-12 Gill-Montague Region, while New Salem and Wendell have a regional elementary school serving 125 students and the towns are part of the 7-12 Ralph C. Mahar Region. Eleven school committees serve 5,800 students from these seven towns, including four regional committees and two union committees.

The regional analysis evolved from a management study that was commissioned with the hiring of a new Amherst-Pelham superintendent. The study found that the schools in the district are not articulated with regard to curriculum, student and parent reporting, assessment, organization, operational efficiencies, programmatic priorities and focus. The location of grade six in each of the elementary schools contributes to overcrowding in elementary buildings while the regional junior high school is underused. In addition to detailed programmatic recommendations, the study consultant found that more operational efficiency was needed: citing transportation, custodial services, information systems and purchasing.

A planning committee was formed to examine various regional options. Due to the varying affiliations at the high school level and the inherent complications, the focus was concentrated at the elementary grades. The other member districts are concerned that a four town elementary region would put their children under the control of Amherst which has greater than 75% of the children living in the four towns. Closing a school building was considered one cost savings advantage of a merger. With declining enrollments, Amherst is considering one of its elementary schools. Because of its distance from the center of the geographic area and the size of other elementary buildings in the group, Pelham elementary would be another practical choice for closure with a realignment of other schools to K-5. School choice students now fill empty seats in Pelham but the cost of education continues to rise while school choice rates remains at the level first established in FY93. Although the long term sustainability of these schools is questionable, the amount of potential savings that would accrue under a K-12 region with these schools closing was viewed as minimal.

The committee is also exploring either the expansion of the region to K-12 or the consolidation of all union functions for the four member towns with the Amherst Pelham Region. Cost estimates for these options ranged from a savings of \$9,000 to over \$600,000. These estimates represent less than .5% of the current budget to a possible 1.2% savings if closing Pelham elementary. Additional issues under consideration involve the steps needed for Leverett and Shutesbury to withdraw from the elementary union with Erving and New Salem-Wendell in order to join with Amherst and Pelham and issues surrounding the closure of a school building, including the impact to the town on the potential loss of state construction reimbursement. There is support to reconfigure the system in order to align the curriculum and develop more operational efficiencies as recommended in the management report. However, the committee did not consider the cost savings compelling and the elementary districts worry that in joining a larger K-12 system, the focus on elementary education will be diminished. The district and area towns are continuing to study different options for consolidation, although the reconfiguration of these districts continues to be a challenge because of the current alliances and local control issues.

**Boxford** received a planning grant to investigate the creation of a Tri Town K-6 elementary region that would serve 2,118 students from Boxford, Middleton and Topsfield. Each of the three towns maintains its own K-6 school district and jointly

hires central administrative staff through an elementary union. The three towns are also members of the Masconomet Regional School District for grades 7-12. Masconomet has its own administration at the secondary level and serves 2,187 students. Part of the impetus for this study is the pending retirement of the long term union superintendent and the state level discussion on regionalization. There have been three failed K-12 regionalization attempts and the elementary districts are concerned about another attempt and about loss of local control, community identity, cost and busing students out of neighborhood schools.

With the current arrangement of shared services and administration, the member towns perceive that the elementary union has many of the advantages of a regional school district. Efficiency however is lacking. The study found that with three separate town budgets, it is impossible to create true curriculum alignment among the elementary districts as well as the Masconomet Regional District. Each town has different kindergarten and foreign language offerings, “inconsistent 7<sup>th</sup> grade readiness because of differences in resources available to teach foreign language, instrumental music and some academic programming. The local committees have continued to meet to review the results of the study and to determine next steps but have expressed reservation in creating another region where individual budget or curriculum needs can be overturned with a two thirds vote.

***Ralph C. Mahar*** is a secondary regional district serving the towns of New Salem, Wendell, Orange and Petersham. Mahar has its own central office administration and serves 838 students. At the elementary level, both Orange and Petersham operate independent districts and have their own central office administration. New Salem and Wendell operate a K-6 regional school district and shares central administration with the K-6 districts of Erving, Leverett and Shutesbury. Orange and Petersham have been working for several years to expand the Mahar district to K-12. New Salem and Wendell along with the other towns in their shared union are similar in size and wealth and are reluctant to give up their long standing affiliation. As noted above, some of these towns are also involved with the Amherst-Pelham Region and studies underway in that area. The Mahar Regional Planning Committee engaged the services of several consultants to assist them in studying multiple options, among them a K-12 four town Mahar Region or a seven town elementary region including the towns of Erving, Leverett and Shutesbury. Multiple concerns and issues must be resolved for any potential reconfiguration of either Ralph C. Mahar or the elementary union. The final report found that over \$286,000 would be needed if teacher salaries were equalized in the Mahar districts. This amount, however, could be offset by savings estimated through streamlined central office functions and increased transportation reimbursement. The increased costs are minimized at the elementary level, but estimates show that there may be savings with either model under investigation. The towns’ multiple affiliations complicate any reconfiguration as has been noted in the Amherst-Pelham study report. Since Orange and Petersham have no other competing alliances, these two towns continue to explore the possibility of forming a K-12 Orange-Petersham arrangement while maintaining New Salem and Wendell as part of the Mahar Region only at the secondary level.

**K-12 Districts:** Many of the current K-12 municipal and regional districts are struggling to maintain educational programming while enrollments are dropping at a rapid pace.

Merging independent K-12 districts with no previous educational, governance or economic affiliation can be difficult. Independent districts with separate school committees have no shared staff, different curriculum goals and objectives, closer reliance on town government for supplemental services, separate contracts for purchasing and transportation, different school schedules and salary scales, transportation policies and technology. For these districts, regionalization would generally mean losing their local school committees, changing central office staff and closing one or more school buildings with corresponding reductions in teaching positions and transportation of students. Which central administration is retained, what seniority policy is used to retain teaching or other staff, and which building to close are some of the questions that face districts in this category. Towns are reluctant to relinquish direct budgeting control and to lose direct state aid. If districts do overcome these hurdles or in the rare instance where buildings are not closing as a result of the merger, there still remains the need to maintain services to students that are currently in the system while negotiating a new coordinated curriculum, school schedules and technology and supporting a new school budget with the potential for increased salary and benefit costs from merging collective bargaining agreements. In addition, some districts are bordered by districts with either long standing affiliations or no interest in regionalization and as a result have limited options.

***K-12 Studies:***

***Berkshire Hills*** Regional District in partnership with ***Southern Berkshire Regional District*** and the union of ***Lee and Tyringham*** hired a consultant to determine where financial efficiencies might be found that would lead to greater educational opportunities for the four districts. Three school districts serve ten towns with a total school population of just over 3,000 students. The report offered several recommendations including; forming a larger union, forming a joint K-12 district or pursuing expanded collaboration.

The report pointed out that consolidating central administrative offices would result in savings. The three districts each have a superintendent, business manager, special education director, and technology administrator. Two of the districts have administrators for curriculum and instruction. Although a rough analysis calculated a savings based on the elimination of the duplicative positions, actual savings would be mitigated by the potential increased salary of remaining central office staff to reflect expanded responsibilities and the need to maintain some duplicative staff to handle the increased workload.

The report found that the small enrollments of the three districts hamper their ability to offer the range of academic courses at the secondary level that are commonly available in larger school systems. Consolidation would allow for expanded course offerings and better use of current staff expertise by allowing teachers to always teach in their areas of strength. It was pointed out that

consolidating three districts into one larger district should not be confused with consolidating all high schools into one high school with the inherent fear of loss of identity and increased transportation costs. More than one high school can exist within one region and having three high school sites might allow for more creative programming.

The report also offered that there would be savings if the two one-room schoolhouses now in the Southern Berkshire Regional Districts were consolidated. The small enrollments of these schools could be absorbed by other schools without increasing staff thereby reducing some personnel costs. It is estimated that closing Egremont could result in savings totaling \$51,000 and \$83,700 could be saved in the closure of Monterey school building. Approximately \$10,000 a year could also be saved by closing the Lee-Tyringham administrative offices now located in a rented facility. The study consultant recommended that a committee be established to devise a comprehensive plan for studying, developing, and possibly implementing a consolidation plan.

Several of the recommendations focused on potential short term cost-savings that could be realized by continuing to expand formal and informal collaborative efforts. Although regionalization is a lengthy process, expanded collaborative activities may be implemented quickly. Professional development, transportation, cooperative bidding and even the consolidation of special education administrators were cited as examples of activities that would benefit from expanded collaborative arrangements. Since all three districts are members of the South Berkshire Educational Collaborative, the study advised exploring additional opportunities for savings through the collaborative. Many interviewed during the course of the study expressed concern over the lack of career-technical/vocational opportunities in the schools. The final recommendation was to appoint a study committee to explore new models of career-technical education for high school students. The School Committees held a forum in October to present the report recommendations to constituents and are continuing to explore long and short term options for increased collaboration and consolidation.

***Hadley*** received a grant to explore regionalization with ***Hatfield***. Both towns operate K-12 municipal districts serving 609 and 394 students respectively each in two school buildings. The final report analyzes costs, curriculum, extracurricular activities, transportation, contract and other related issues. Although, these two districts are similar, already work together in several areas and may expand this cooperation as a result of the identification of other similarities, this study found that an additional \$250,000 would be needed if salaries were equalized through a new joint collective bargaining agreement. Under a regional plan Hatfield high school would become the middle school and Hadley high school would become the regional high school. The study found that there would be a slight decline in staffing at the high school level, but this would be offset by the need to increase staff at the middle school level to maintain current programming and class size. Although there would be educational and co-curricular opportunities with a new high school and middle school configuration, there does not seem to be cost savings inherent in this merger. Additional funds would be needed to align salaries and benefits, to

coordinate curriculum and to merge buildings and athletic and other extra curricula activities.

Although there would be positive educational benefits, given the additional costs identified, it is unlikely that these two towns will pursue formal regionalization, but may continue to explore other collaborative endeavors.

**Harwich** received a grant to explore regionalization with **Chatham**. Each town operates a K-12 district, has declining enrollments and has been interested in a high school construction project. With MSBA's encouragement and the regional planning study, they recognized the benefits of merging high school buildings and the opportunity to share these costs through a regional structure. The towns have recently appointed a planning board that has met several times to discuss the procedures for regionalizing, program areas that will need consolidation and the financial impact. A facilitator hired through the planning grant has assisted in these discussions. The planning board has continued to focus on the educational advantages of a joint high school and the opportunity to offer a broader range of educational and extra curricular programming through a K-12 district. The Planning Board continues to meet to investigate the possibilities.

**Greenfield** is a K-12 district serving 1,900 students. Greenfield is exploring several areas of interest. The school committee has met with Gill-Montague to discuss areas of cooperation and possible regionalization and has explored a superintendency union with the Mohawk Trail Regional District. Greenfield has also been undertaking a review of the merger of certain city and school activities. Greenfield and Gill-Montague, as well as other districts and towns mentioned in this study were part of an earlier Franklin County Study explained in "*School district consolidation*" brief. The Franklin County districts are continuing to participate in on going discussion for further collaboration and cooperation within the County.

**Provincetown** is a K-12 district that serves 147 students in two school building. A planning committee was formed to explore regionalization options; including regionalizing elementary grades with either Truro or one or more of the Nauset elementary districts, joining the Nauset Regional District or tuitioning secondary students to Nauset. Provincetown's only contiguous neighbor, Truro, has resisted all efforts to regionalize. Nauset, as indicated, above is exploring either expansion of its existing region and/or the possibility of expanded collaborative or regionalization efforts with other lower Cape districts. Additional meetings and discussions have occurred in Provincetown where enrollments have declined by over 17% in five years. Provincetown has also discussed the possibility of combining the elementary and secondary students into one K-12 Provincetown school building. Both the elementary and high school buildings have been recently renovated and are receiving MSBA construction reimbursement. The loss of state construction aid and the distance and transportation expense should they merge either some or all grade levels with a neighboring district are major concerns. Because of its geography, Provincetown is in a unique position with few options for regionalizing. The district is continuing to explore all options.

**Vocational Group:** Most cities and towns are members of a regional vocational school district while others tuition out students to vocational placements or offer vocational programs within their own K-12 program. Several small towns with no vocational affiliation and existing vocational schools are exploring expanded regionalization of services.

The 26 regional vocational districts were established primarily between 1960 and 1965 although the county agricultural schools have a longer history. The regional vocational districts were formed to provide vocational opportunities for cities and towns that did not have a sufficient number of students to offer the program on their own. All but two of these schools enroll less than 1,500 students and serve from three to nineteen towns. Vocational districts have one school building that was generally constructed close to the geographic center of the member districts. The uncertainty and fluctuation in state transportation reimbursement is of major concern to the existing districts and creates an obstacle for further expansion.

### **Vocational Studies**

**Westfield** is an independent K-12 municipal district that also operates a vocational high school serving 500 students, approximately 70 of which are tuitioned in from neighboring communities. Planning funds were requested to study the feasibility of creating regional vocational-technical partnerships and collaboration between Westfield and the member towns of Southwick-Tolland and Gateway Regional Districts. A consultant was hired to identify the number of students attending vocational programs at Westfield from outside placements and the types of programs they attended. Other placement choices made by vocational students from neighboring districts were also explored to determine if Westfield programs could accommodate or be expanded to serve this population. Currently, the Lower Pioneer Valley Educational Collaborative offers vocational opportunities to some of the neighboring area students who attend their home school for academic programs. As part of the study, the consultant also explored the effects of closing Westfield Vocational High School and/or partnering with Lower Pioneer Valley Collaborative to expand vocational opportunities in the area. With limited vocational programs available in this part of the state, various options continue to be studied.

**North Shore** is a regional vocational district serving 450 students from 16 towns within Essex County. Essex County Agricultural School serves 442 students from Essex County which includes another 18 cities and towns. The City of Peabody is a part of Essex County and offers its own vocational programs for city students. For over ten years these three districts have been discussing a merger that would involve the construction of a new building on the present Essex County Agricultural School campus to include the North Shore and Peabody programs. The three facilities currently serving vocational/agricultural students in these districts are in need of additions and major renovations. When requests for state construction funds were first proposed, the then Commissioner of Education formed an advisory committee to explore the benefits, effectiveness, and feasibility of a regional solution through the potential merger of the three schools. Legislation was subsequently enacted to establish the Essex North Shore Agricultural Technical School District under a temporary oversight board and to fund a Phase II Feasibility Study.



The results of the feasibility study convinced the Oversight Board and the local school and municipal representatives that a new school, combining the three current facilities, would enhance educational opportunities, accommodate the growing wait list of students desiring a vocational/agricultural experience and be a cost effective opportunity to resolve the structural issues in the existing facilities. The state has pledged close to \$100 million to help fund the school's construction with the now 17 North Shore Vocational members asked to pay the remaining \$31.2 million. All member towns are in the process of approving the necessary local funds to support their share. With this merger the North Shore Regional Technical High and Essex Agricultural schools would close and a new school would be constructed for 1,400 vocational and agricultural students.

### **Conclusion:**

Although some of the challenges and benefits of regionalization vary depending on each district's current configuration, some issues are commonly cited in each grouping. Not surprisingly, many of the concerns and advantages have been expressed in the past.

Some of the factors that led to the creation of the existing regions still motivate districts today. 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 supports K-12 regionalization. Many of the final reports did not address educational issues directly but rather concentrated on the cost of regionalizing and determined that the educational advantages would not outweigh the additional financial investment. Those that did address educational issues consistently reported that they envisioned educational improvements in a regionalized situation. Towns and districts that recognize these advantages are exploring creative ways to resolve identified obstacles.

Clearly local control issues continue to hinder efforts to regionalize. Maintaining the focus on elementary education was a priority expressed by districts in each group affiliation. Some districts emphasized the importance of hiring or assigning a curriculum director to concentrate on elementary education, while others stressed the importance of expanded school councils. 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. This method satisfies the one person one vote requirement, but provides all residents in all towns with an equal opportunity to vote for all members of the school committee.

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 forego 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.

Some districts recognized that in order to maintain educational programming over the long term, local control and financial issues would need to be resolved. Misconceptions that regionalization would require school closures, 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. The planning studies helped districts to recognize that some local areas of concern could be negotiated and tailored language to address these concerns included in regional agreements. The agreement may include language addressing elementary concerns, maintaining town school buildings and electing school committee representation. Several districts are exploring assessment methodologies that are tailored to mitigate some of the potential increases required to support shared spending in a regional district while still meeting the Chapter 70 requirements. The Ayer-Lunenburg-Shirley planning board convinced ESE that a transition period was needed in order to provide for an organized transfer of authority and responsibility from independent districts to a regional district structure. The regional regulations were amended last year to give the Commissioner of ESE the authority to approve transition plans.

This overview provides only a brief summary of the findings outlined in these comprehensive reports. As noted, some districts are moving closer to regionalizing with others are in the initial stages and are continuing their discussions. While some districts will elect to not move forward with regionalization plans at this time, the grant funds did help to further discussion among districts on ways to improve programs and services. Consistently, involved districts reported on the value of maintaining on going discussions and exploring collaborative and cooperative programs and services with neighboring districts.

*For further information, please contact Christine M. Lynch, Director of School Governance at the Massachusetts Department of Elementary and Secondary Education.*

## ***Appendix A: Advantages and Challenges of Regionalization***

### ***Advantages of a K-12 Unified School District***

- A single school committee with cohesive educational policy for all K-12 students
- A single administration with potential for more efficient and economical operations
- A coordinated curriculum, kindergarten through grade twelve
- A single salary schedule and a single teacher unit for negotiation purposes
- 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
- Fuller utilization of teachers and all school facilities
- 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
- Opportunity to offer more programs and enrichment within school curriculum
- Opportunity to expand athletic programs and extra curricular activities
- Coordinated program of testing, guidance, health services and school adjustment work
- Expanded offerings could lead to decrease student loss under school choice

### ***Challenges facing Regionalization Efforts***

- *Local control and community distinctiveness*
  - Unwillingness to share control with neighboring towns
  - A feeling of loss of local pride
  - Loss of positions for local school committee members
  - Potential change in administrative leadership and staff
  - Loss of town control of state aid when funds are distributed directly to the regional district
  - Loss of direct budget control and control of school buildings
  - Potential for closing town school buildings
  - Concern for job security
- *Economic, Educational and/or Social Differences:*
  - Wealthy districts object to joining with poorer districts for fear of having to pay an undue share of the costs of the new district
  - Poorer districts may fear increased tax to meet higher standards
  - Loss of focus on elementary education
  - Differences in financial support of education
  - Differences in educational goals and objectives
  - Real or perceived social differences
- *Resistance to any change/misconceptions*
  - Fear that buildings will close – loss of local identity
  - Fear that elementary students will be transported across town lines with longer bus rides
  - Refusal to recognize the shortcomings of the small school district
  - Belief that smaller is better with more individualize attention to students

- Belief that town is doing its best for students and joint district is too far removed from understanding of town desires
- Interchangeable use of terms small school districts and small schools
- Fear there will be more state control
- Fear there will be more bureaucracy in a larger regional administration
- Fear there will be larger schools and class sizes
- *Financial:*
  - Belief that more state aid, a change in the state aid formula or a reduction of state and/or federal mandates will resolve existing challenges and allow existing districts to remain independent
  - Unwillingness to share budget control over educational spending
  - Absorption of town related services and costs into regional budget
  - Potential increased costs:
    - Requirement to hire a regional treasurer
    - Additional costs to coordinate technology, align curriculum and school schedules, negotiate and combine contracts and leases, etc.
    - New Collective Bargaining agreements that often result in an increase in salaries to the level of the highest district member
    - The impact on other employment benefits and tenure
    - Legal costs to develop agreement and negotiate contracts
    - Cost of buy-in: Small towns interested in joining an existing regional district or merging with another district often must pay a capital charge for the use of an existing school building
  - Loss of state construction aid if closing a school building recently constructed or renovated with state funds
  - Credibility of the state: Lack of trust in continued state reimbursement promised to regions, e.g. decrease in state transportation aid
  - Changes in operational assessment methodology under the educational reform law where towns must pay according to ability based on state formula not on a per pupil basis as had been the case in regional districts.