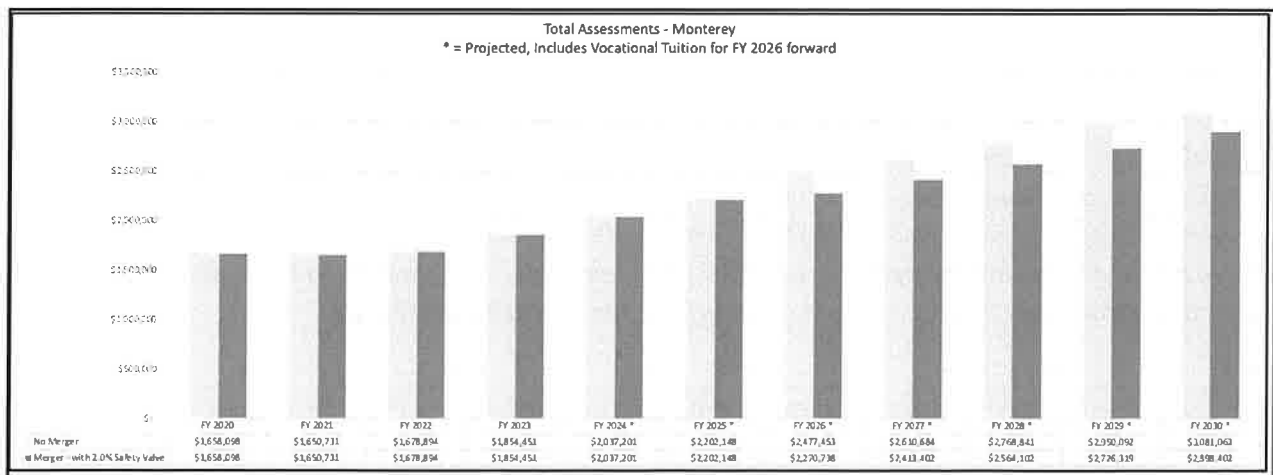




## MONTEREY

MONTEREY: QUICK FACTS	
Population	1,095
Student Foundation Enrollment (projected for FY26)	86 (5.9% of 8 Town Total Enrollment)
Tax rate (2023)	\$6.09
Average Single Family Tax Bill (2023)	\$3,995
Average Single Home Value (2023)	\$655,955
Total taxable property (2023)	\$607,342,608
Tax levy (2023)	\$3,698,716



*This graph represents comparisons of MERGER versus NO MERGER both pre- and post-merger (2026) with a 2% Safety Valve applied.*

**ESTIMATED ASSESSMENTS PROJECTED (MERGER V. NO-MERGER, FY26,28,30)**

	FY2026			FY2028			FY2030		
	New High School	Operating	Total	New High School	Operating	Total	New High School	Operating	Total
Monterey - MERGER	\$ 85,929.00	\$ 2,184,809.00	\$ 2,270,738.00	\$ 85,339.00	\$ 2,478,764.00	\$ 2,564,102.00	\$ 83,494.00	\$ 2,814,908.00	\$ 2,898,402.00
Monterey - NO MERGER	\$ 87,783.00	\$ 2,389,670.00	\$ 2,477,453.00	\$ 91,333.00	\$ 2,677,508.00	\$ 2,768,841.00	\$ 92,398.00	\$ 2,988,663.00	\$ 3,081,062.00
MERGER v. NO MERGER	\$ (1,854.00)	\$ (204,861.00)	\$ (206,715.00)	\$ (5,994.00)	\$ (198,744.00)	\$ (204,739.00)	\$ (8,904.00)	\$ (173,755.00)	\$ (182,660.00)

*This table represents comparisons of MERGER versus NO MERGER in each of the three selected years. Percentages reflect the comparison of Merger versus No Merger in a single fiscal year based on projections. Overall operating and costs associated with construction of a new high school are displayed. Non-debt capital appears under the capital column in the NO MERGER scenario and the operating column in the MERGER scenario.*

**ESTIMATED ASSESSMENTS PROJECTED (MERGER V. NO-MERGER, FY25-FY30)**

	FY2025		FY2026		FY2027		FY2028		FY2029		FY2030	
	Capital	Total	Capital	Total	Capital	Total	Capital	Total	Capital	Total	Capital	Total
Monterey MERGER (\$)	\$ 85,495	\$ 2,202,148	\$ 85,929	\$ 2,270,738	\$ 86,580	\$ 2,413,402	\$ 85,339	\$ 2,564,102	\$ 85,196	\$ 2,726,319	\$ 83,494	\$ 2,898,402
Monterey- MERGER (% change from prior year)	\$ -	\$ -		3.11%		6.28%		6.24%		6.33%		6.31%
Monterey - NO MERGER (\$)	\$ 85,495	\$ 2,202,148	\$ 87,783	\$ 2,477,453	\$ 90,324	\$ 2,610,684	\$ 91,333	\$ 2,768,841	\$ 92,224	\$ 2,950,092	\$ 92,398	\$ 3,081,062
Monterey - NO MERGER (%)	\$ -	\$ -		12.50%		5.38%		6.06%		6.55%		4.44%

*This table represents comparisons of MERGER versus NO MERGER across six fiscal years. The percentage change represents the increase from one fiscal year to the next, with a comparison of how that change is projected in both a MERGER and NO MERGER scenario.*

**COST OF CVTE V. NEW HIGH SCHOOL (MERGER V. NO-MERGER, FY26)**

Summary	Contribution (FY2026) Towards New High School	Cost per \$100,000	Average Home	Additional Cost for Average Home*
Monterey - NO MERGER	\$ 83,942.00	\$ 15.37	\$ 587,402.00	\$ 90.26
Monterey - MERGER	\$ 44,390.00	\$ 8.13	\$ 587,402.00	\$ 47.73
<b>SAVINGS REALIZED BY BUILDING 8 TOWN HIGH SCHOOL V. 3 TOWN HIGH SCHOOL</b>				<b>\$ 42.53</b>

*This table represents comparisons of MERGER versus NO MERGER as related to the construction of a new high school as an 8 Town effort or a 3 Town effort. \*Estimates reflect a five-year average for taxable property, tax levy, tax rates, and average home prices. The amount noted in "cost for average home" would be added to existing property taxes. CVTE costs (estimated at 3 students in FY26) associated with tuitioning into a 3 town high school are considered in the NO MERGER scenario.*



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8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

## FAST FACTS ABOUT COMBINING OUR DISTRICTS

Following a multi-year period of research and study, the 8 Town Regional School District Planning Board determined that combining the Berkshire Hills Regional School District and the Southern Berkshire Regional School District is not only a viable choice, but is the best path forward for our students, educators, and community members alike. Here's why:

Enrollment in both districts has declined at staggering rates. A merged 8 Town district would be much better positioned to weather these declines, which are projected to continue.

- The recommended model would preserve existing elementary and middle schools while combining the two high schools into a single high school in a newly constructed, state-of-the art building designed for a 21st century education.
- Merging the two districts would create economies of scale and efficiencies, with operating cost savings in the range of \$1.5 million a year.
- Students would benefit from educational enhancements and more opportunities, including six new vocational programs and several innovative pathways. Participating students would gain skills that address local workforce needs (for example, early childhood education and care, horticulture/agriculture and the trades). Students would have better and broader access to Advanced Placement courses, Early College, and electives (such as computer science and engineering).
- Students would have broader and better access to services supporting English Language Learners, Special Education, alternative education programming, and social-emotional-mental health.
- There would be more extracurricular options for students in sports, music, arts, drama, and clubs. In a combined high school, more students would mean more robust athletic teams, including junior varsity teams and less of a need to form (and travel significant distances to) cooperative teams in other districts.
- A merged district, while still relatively small, would offer a more diverse population of students, teachers, and staff, with greater opportunities for peer support and networking.



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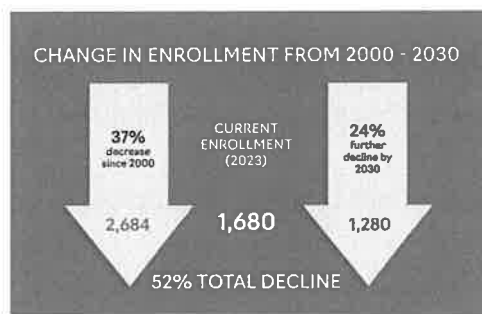
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8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD  
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## ENROLLMENT IS DECLINING

School enrollment in our Southern Berkshires region has dropped significantly in recent decades and is projected to continue to decline. This has created increasing pressures on our districts and taxpayers to be able to provide our students with the programming and support that they need to succeed. A merged district would be much better positioned to efficiently manage these enrollment declines in a way that ensures a broad range of high quality programs and services for our students.



TOTAL ENROLLMENT K-12 BY YEAR

Year	Number of Students K-12		
	BHRSD	SBRSD	Combined
2000	1,612	1,072	2,684
2010	1,356	865	2,221
2023	1,112	568	1,680
2030 (projected)	877	403	1,280

*\*Includes K-12 data. A more comprehensive analysis that also includes pre-K enrollment can be found in our research team's Enrollment analysis, and Student Flow analysis*

By merging, we would be better able to:

- Protect what we currently have – rather than face the prospect of having to reduce or eliminate existing programs because of too few students or too little revenue.
- Optimize class size.
- Offer more comprehensive academic programs, services, supports, and enrichment activities.
- Offer expanded extracurricular sports, clubs and activities with fuller rosters and more robust participation.
- Save money through economies of scale.



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8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

## BUS RIDES & TRANSPORTATION EFFICIENCY

The 8 Town board closely examined community concerns regarding length of bus rides and transportation costs by working with an independent and respected transportation firm, Alliance Education Associates, LLC, to assess routes and equipment.

The findings of that independent firm – reached using state-of-the-art bus routing transportation software – were encouraging: a merger would result in a single fleet of appropriately- sized vehicles that would allow for greater utilization and efficiencies. Specifically,

- Elementary and middle school students' time on the bus would either stay the same or decrease.
- While some high school students would have longer bus rides, many students would have shorter bus rides.
- All students would benefit from a reduction in the maximum time on a bus from the current 1 hour to 45 minutes with the addition of some vans at modest additional cost.
- That same investment would ensure almost all students would have bus rides shorter than 30 minutes.
- Elementary students (from the SBRSD towns) would no longer have to ride buses with high school students.
- Bus transportation would be expanded for after-school activities.

***“It is our opinion that both the financial and route/ride time impacts of the various scenarios, even with recommended route revisions, is minimal. Therefore, transportation should not be a determining factor relative to regionalization and should not enter the educational decision-making process as to what is best for students.”***

Additional Transportation Reports, including the following, are available on our website:

Transportation Follow-Up (Alliance), March 2023  
Transportation Analysis (Alliance), November 2022  
Transportation Analysis, January 2022

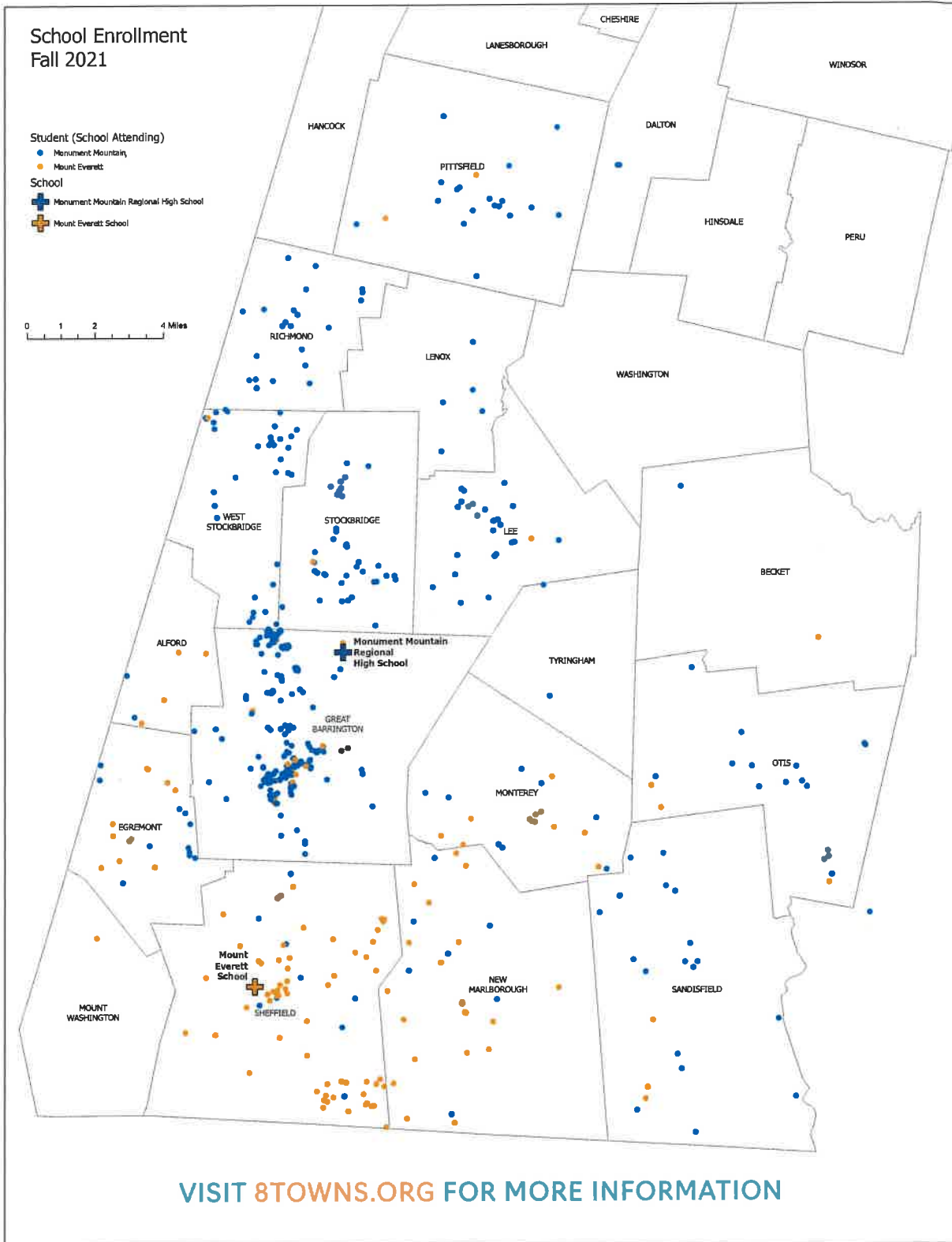


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## 8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD



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## 8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

# MORE EDUCATIONAL CHOICES & OPPORTUNITIES

The 8 Town Board agrees with its research team that merging the two districts would give high school students more educational choices and opportunities. Combining the districts would allow for a more consistent educational journey across grades and schools, which is generally recognized to produce better outcomes for students and teachers. A merged district would also be much better positioned to manage the challenges of maintaining programming in the wake of declining enrollment.

***“A merged district would allow the 8 towns to work collaboratively (rather than competitively) to provide the best possible education for the students of the region.” ~H. Jake Eberwein, Ed.D.***

The 8 Town Board's recommendation on the educational advisability of merger was based on the three guiding principles:

- Ensure that all students in the 8 towns have equitable access to the broadest range of high-quality academic programming, enrichment activities, and targeted services.
- With the aim of supporting student growth and development, ensure that faculty and staff have the necessary resources, peer network, and professional learning and growth experiences that reflect contemporary, research-validated teaching and learning practices.
- Through combined efficiencies and scale, advance new programming that expands educational opportunities and improves outcomes for students.

### **THE NEW HIGH SCHOOL BUILDING FOR A MERGED HIGH SCHOOL COULD PROVIDE:**

- Flexible classroom spaces that reflect progressive teaching practices that encourage large group, small group, and individual work spaces, as well as performance and community gathering spaces.
- Space for classroom and skill development, contemporary tools, and technology provided in partnership with local employers for vocational programming (Chapter 74).
- State-of-the-art science, technology and engineering spaces.
- Arts and music spaces designed in concert with experts from our local (nationally-recognized) arts and music scene.
- Student services spaces that support specialized needs, from counseling and mental health, to special education and academic intervention.
- Wellness spaces that reflect life-long activities, including a fitness center, yoga studio, and a range of team/club sports.
- Upgraded career-centered and vocational equipment and spaces used to offer adult education opportunities to meet current and projected needs.

### **MORE EDUCATIONAL CHOICES AND OPPORTUNITIES WOULD INCLUDE:**

- Students in all grades and across all schools would benefit from an aligned curriculum consistent with national and state best practices.
- Optimized class sizes would allow for additional electives or second sections of classes, resulting in a more accessible, broader curriculum that better responds to student needs.
- More robust programming for English Language Learners, special education, social/emotional/mental health, and alternative education services. **CONTINUED...**



## **CONTINUED...**

- Recognizing that 50% of South County high school graduates do not earn a high school degree, students would have more career-centered, engaging educational options that provide them with hands-on experience and skills, including:
  - Up to 6 vocational programs that may include automotive technology, horticulture/agriculture, early childhood education and care, carpentry, culinary arts, building property and maintenance, or others.
  - Several innovative pathways that encompass health sciences, computer science, engineering, and many more.
  - The opportunity to gain skills required for higher paying jobs with career paths and to fill local vacancies creating a more qualified and skilled workforce.
  - More equitable access to vocational programs that match opportunities provided in neighboring districts, and would save taxpayers money by reducing the significant costs (shouldered by individual towns) of enrolling and transporting their students to out-of-district vocational programs.
  - Increased Adult Education and workforce development could be offered to local people and businesses.
- Students would have more Advanced Placement, Early College, and elective options.
  - In combining current offerings at both high schools, students would have access to more than 25 AP, Early College, or Dual Enrollment options
  - Incorporating the current SAT prep offering at SBHSD and college essay writing support services at BHRSD, students at a merged high school would be better supported in their higher education pursuits.

## **EXPANDED ACCESS TO ENRICHMENT AND CO-CURRICULAR ACTIVITIES:**

- Increased enrollment would ensure more robust athletic teams with both varsity and junior varsity teams, and would result in less need for travel to cooperative teams in other districts.
- All clubs (Project Sprout, Robotics, Best Buddies, MMTV) offered at one school would be offered to the entire student body, up to 12-14 additional activities.
- Musical groups and electives (band, jazz, orchestra, choir) would be available to more students on an expanded basis.

## **STRONGER SUPPORT FOR FACULTY AND STAFF:**

- Improved teacher recruitment and retention.
- All SBRSD teachers hired by the merged district would receive pay raises to match BHRSD salaries.
- Larger and stronger network of faculty peers.
- A merged district could expand shared professional development and training for teachers and staff.
- More opportunities for training across role types (custodial, administrative assistants, paraprofessionals).

## **A MORE DIVERSE POPULATION OF STUDENTS, TEACHERS, AND STAFF WITH CLASS SIZES THAT ALLOW FOR DIVERSITY OF EXPERIENCE. TOGETHER WE WOULD HAVE THE CRITICAL MASS NECESSARY TO SUSTAIN AND EXPAND OFFERINGS.**

- A larger student body would provide the opportunity to create a culture of broader inclusion and more people power for marginalized groups.
- Merger would create a larger and richer faculty cohort with diverse backgrounds and perspectives.
- Classes such as orchestra that require a minimum number of students could be offered to more students.
- Peers, mentors and allies would be available for more students and staff.



## 8 TOWN REGIONAL SCHOOL DISTRICT PLANNING BOARD

### **COST SAVINGS**

The extensive financial analysis conducted by the board's research team concluded that merging the two districts – even accounting for the estimated cost of a new high school – is likely to cost the taxpayers of the 8 towns less than would not merging. This is because merger would allow for the pooling of resources and economies of scale. Specifically,

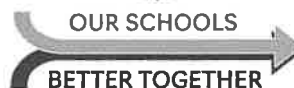
- Through economies of scale and efficiencies, the merged district could realize savings in the range of \$1.5 million/year. This amount could reduce future increases in town assessment or be reinvested in educational enhancements.
- Class size and instructional resources could be optimized to ensure that students have access to courses through appropriate staffing levels.
- Centralized operations could lead to increased coordination for opportunities such as grants, partnerships with community organizations, and training of employees.
- All SBRSD teachers hired by the merged district would receive pay raises to match BHRSD salaries.
- A new high school constructed for a merged 8 town district would:
  - For BHRSD towns - reduce their local share (after state reimbursements) of the construction costs as compared to their share of the cost of building the new high school for just the 3 BHRSD towns.
  - For SBRSD towns - avoid significant costs associated with CVTE (Chapter 74) tuition were students from the SBRSD towns to elect to attend CVTE programs at a newly-constructed BHRSD 3 town high school. These town-borne costs are estimated at \$26,200 per student including transportation plus capital costs. Projections suggest that the cost to the SBRSD towns of a new high school (using the recommended methodology for assessment of debt service costs for that construction) would be significantly lower than potential costs associated with SBRSD students electing CVTE programming at the new high school (or another district).

### **OPERATING COSTS**

The 8 Town Board developed a creative assessment methodology to apportion the operating costs of a merged district grounded on the following principles:

- There must be no stark “winners” or “losers” among the 8 towns.
- We employ “smoothers” to guard against large and/or disparate swings in town assessments from one year to the next based on fluctuations in student population or other factors.
- We utilize a 5-year rolling average (currently used by SBRSD) of the state-calculated “required local contribution” (RLC) for each town's assessments.
- In addition, we utilize a “safety valve” cap to ensure that no town's operating assessment increases in any year by a percentage that is significantly higher than the increases in the other 7 towns.

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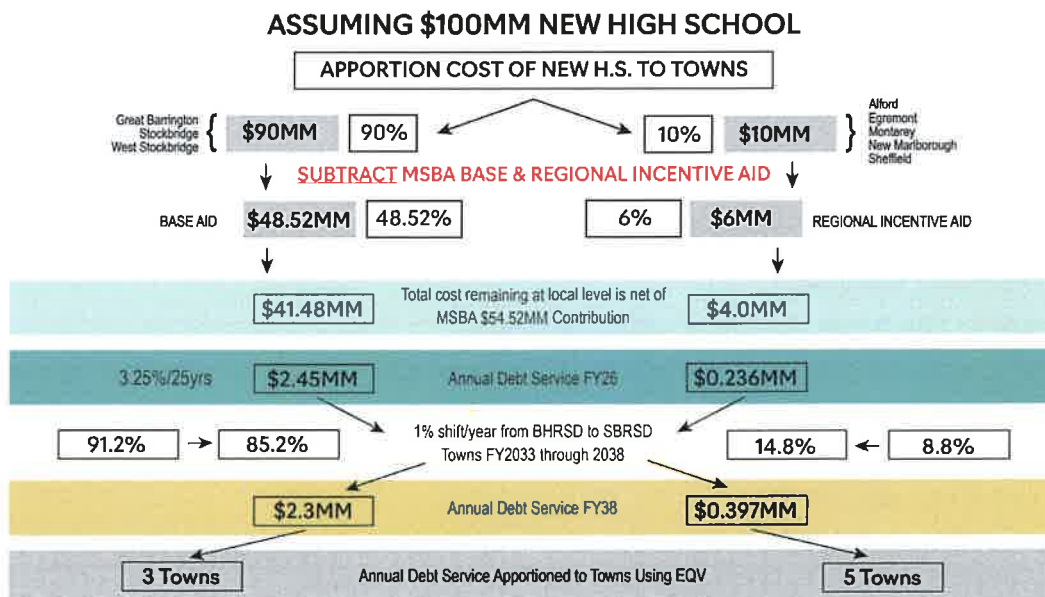
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## CAPITAL COSTS

The 8 Town Board developed a set of assessment methodologies for legacy debt (meaning debt owed by the existing districts just prior to merger), debt incurred to construct the new high school, and other debt that the new district may incur at some time in the future. Again, the guiding principles were that the methodologies must be reasonable, fair and affordable to each of the 8 member towns, and take into account the fact that the BHRSD intends to build a new high school whether or not the two districts merge, and that but for the merger, the SBRSD would not build a new high school.

- Legacy debt currently owed by the SBRSD would be assessed to the SBRSD towns through the remaining term of the current bond (2032).
- The debt service cost for the construction of a new high school would be assessed as follows:
  - A relatively modest portion of the debt service would be assessed to SBRSD towns based loosely on the projected incremental cost of building a high school for approximately 620 students (the estimated size of the combined high school) rather than 485 students (the size of a high school for just the BHRSD students).
  - SBRSD towns would initially assume just 4% of the total construction cost (or a little less than 10% of the local cost after application of expected state aid of about 55%).
  - BHRSD towns would assume 41.5% of the total construction cost (or a little more than 90% of the local cost after application of expected state aid of about 55%).
  - In 2033 (after all SBRSD legacy debt is fully paid off), the five SBRSD towns would pick up an additional 1% of the debt service costs each year reaching a SBRSD town contribution to debt service of just under 15% in 2038 and thereafter.
  - The state is expected to contribute about 55% of the overall construction cost.

An illustration, with assumptions noted, is provided below.



*\*Any MSBA incentives received, other than base aid and regional incentive aid, will be applied to reduce the cost to be apportioned to the Towns.*



A presentation on the operating and capital cost assessment methodologies, including projections of total assessments (which include the estimated cost of the new high school and all legacy debt), and a town-by-town analysis based on the approved methodologies, model assumptions, and estimated projections are available at [8towns.org](http://8towns.org) under the FINANCIAL FACTS tab or use the QR code to access.