

**TO:** Boston School Committee  
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**CC:** Mary Skipper, Superintendent  
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**DATE:** April 26, 2023  
**RE:** Overview of School Merger Proposals and Journey to a Joined School Community

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## Overview of School Merger Proposals

This proposal is to merge the Pauline A. Shaw School and Charles H. Taylor School beginning in SY24-25, and the John D. Philbrick and Charles Sumner School beginning in SY25-26. While the term “merger” is commonly used throughout this proposal, we often use the terms “joined school community” or “combined school community.” This terminology is meant to signify that we are not asking two school communities to exist together in a shared space; instead, we are providing support and resources to bring two separate communities together intentionally, leveraging the assets of each community to build a school that better serves its students, families, and educators.

These are not the only merger proposals that will come before the Boston School Committee in years to come. Combining and reconfiguring schools is an essential strategy to address some of the District’s long-standing challenges and take advantage of our greatest opportunities. These can be loosely organized into four interdependent themes: physical space and pathways, enrollment and budgets, staffing, and instruction and programming.

Combining schools will support our strategic priorities in each of these four domains, albeit in different ways and on different timescales. In the Shaw-Taylor proposal and Philbrick-Sumner proposal describe how the Shaw, Taylor, Philbrick, and Sumner communities will each be left better off by these mergers. Here, we take a broader view and describe how school mergers support our entire District in becoming more sustainable, more inclusive, and more effective in serving our young people – particularly students of color, multilingual learners, students with disabilities, and students with low socio-economic status, as well as their families and broader communities.

### Instruction and Programming

BPS is committed to implementing District-wide policies and systemic changes to ensure that students are educated in the least restrictive environment, with a full continuum of services available for all students. This commitment to inclusion was facilitated by the 2021-2024 collective bargaining agreement with the Boston Teachers Union (BTU), and will be implemented in partnership with BTU members through School-Based Inclusion Planning Teams beginning in the summer of 2023.

Ensuring sufficient physical space, full classrooms, stable budgets, and sustainable staffing levels are all essential to creating the operational foundation for inclusive instructional practices – including continuous professional development and support. In SY23-24, several dozen elementary schools will not have the physical space to maintain a double-strand, inclusive educational program – including the Shaw and the Philbrick. These smaller schools are generally not capable of expanding inclusion. District-wide, this leads to an over-concentration of students with disabilities in a small number of larger elementary schools.

As we accelerate school construction and renovation through the Green New Deal for BPS, we will build schools large enough to comfortably fit at least two full strands, with the auxiliary space required to create high-quality educational experiences, support enrichment, and foster teacher collaboration & well-being. Overhauling our entire building portfolio will take many years, and our students can't wait decades. In the short- and medium-term, merging two or more schools together will address the above operational challenges – described in more detail below – and enable BPS to meet our commitment to inclusion, expand high-quality academic and enrichment programming, and improve the student and family experience in BPS.

### Physical Space and Pathways

In 2019, the Boston School Committee approved a proposal for BPS to become a primarily K-6/7-12 and K-8/9-12 system, offering students an educational experience that requires

only one transition. At that time, half of the BPS schools serving elementary grades were in buildings that had fewer than 15 classrooms, considered a minimum amount of space for a double-strand K2-6 school, with two classes at each grade level. Compared to single-strand schools, schools that have at least two full strands are better able to support teacher collaboration, staffing levels that facilitate inclusive educational models, and an expansion of academic, enrichment, and support programs for students.

In 2023, as we have solidified our commitment to expanding early childhood education and expanding inclusive practices to every classroom, our standards for what spaces are required in every school have shifted, placing further demands on our physical footprint. This presents a challenge for smaller elementary schools, which face a difficult tradeoff between either expanding to become a preK-6 school or adding or sustaining the academic, enrichment, social-emotional, and family engagement programs or services that make up high-quality learning environments.

An inclusive, double-strand K1-6 elementary school might have 16 core classroom spaces: two each at every grade level. To provide high-quality inclusive education, the school might also need, for example, 4 substantially separate spaces to create opportunities for partial inclusion, 3-4 specialty classrooms, and 2-3 pull-out or therapeutic spaces. This means that an ideal double-strand school has 25-27 educational spaces.

Combining elementary schools – whether into one shared facility, wherever possible, or across two campuses – leads to more efficient uses of classroom space, both creating a continuous preK-6 pathway and also freeing up physical space that can be used for services and supports outside of the traditional core classroom to provide a high-quality, inclusive education for all students.

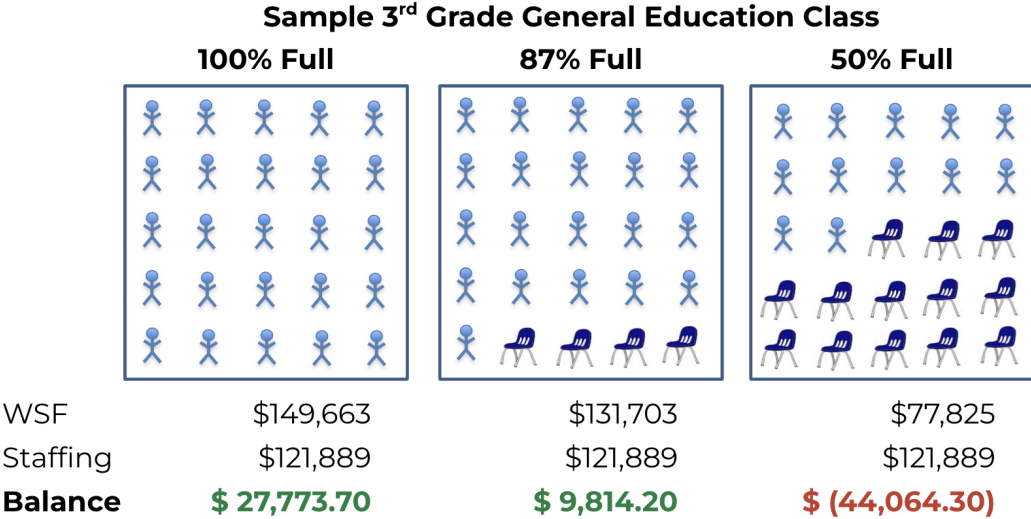
## Enrollment and Budgets

Total enrollment in BPS has declined by 8,000 students, or 14%, from SY13-14 to SY22-23. This trend is partially explained by broader demographic trends: for comparison, resident births during the corresponding time period declined by about 9%. Declines are concentrated in the elementary grades, which suggests that they will continue in the near future.

Over the last 10 years, BPS has not reduced seat capacity to match declining enrollment. From SY18-19 to SY21-22, while enrollment in grades K2 through 5 declined by 3,371 students, total capacity was reduced only by 1,352 seats. During this time, we have worked with schools to identify strategic opportunities to reduce capacity by closing partially-filled classrooms, leading to more sustainable school designs and budgets. At this point, there are few remaining opportunities to consolidate classrooms without closing, merging, or significantly reconfiguring schools.

The ongoing preK-6 and 7-12 School Design Study, led by DLR Group and managed by the City of Boston Public Facilities Department and BPS Office of Capital Planning, will develop updated capacity calculations for each school building, based on the full range of flexible and inclusive programming that BPS seeks to offer in every school. When this study is complete later in 2023, the updated capacity analysis will support the development of a long-term facilities plan for the District, with a clear roadmap for aligning BPS capacity with our student population.

Because of the Weighted Student Funding (WSF) model, under-enrollment has major budget implications for individual schools and for the entire District. The WSF formula means that as a school’s enrollment changes, funding levels change correspondingly. The “fullness” of classrooms determines the funds available for supports and services outside the traditional core classroom.



In the diagram above, a hypothetical 25-student classroom that is 100% full would receive a WSF allocation that not only allows the school to operate the classroom with a bare minimum of operational support and staffing, but also invest nearly \$28,000 in resources outside the core classroom. With the same required expenditures on core staffing, a 25-student classroom that is only 50% full would run a deficit of more than \$44,000, straining the school’s overall budget and limiting the ability to invest in specialists, enrichment programming, additional support staff, or other resources.

Since SY21-22, in response to Covid-19, BPS has responded to declining enrollment through its “hold harmless” policy, which has spent \$117M to continue to operate classrooms with fewer and fewer students. As BPS prepares for the end of federal ESSER funding, it will no longer be possible to continue the hold harmless policy without critically examining our schools’ overall capacity and reconfiguring schools to create fuller classrooms.

Repeated across the District, this dynamic of under-enrolled classrooms compromises the financial sustainability of many schools – particularly schools that serve a higher proportion of Black and Latinx students. In SY22-23, the bottom quartile of schools ranged from 55 to 74% full. Schools in this bottom quartile are, on average, 84% Black and Latinx, compared to schools in the top quarter of “fullness,” which are, on average, 64% Black and Latinx. This means that Black and Latinx students are more likely to attend a school that cannot easily afford the specialists, enrichment programming, or support staff that improve a student’s educational experience, strengthen outcomes, and close opportunity gaps.

Combining or reconfiguring schools in ways that lead to fuller classrooms will stabilize school budgets, enabling schools to invest in the wraparound supports that benefit BPS students, families and communities.

### Staffing

Consolidating classrooms also helps to address the District's staffing challenges related to hiring and retention. BPS’ teacher shortages mirror nationwide trends, which have been exacerbated by the pandemic. As of October 1, 2022, there were 176 teacher positions and 152 paraprofessional positions that remained unfilled. Staffing shortages lead to classrooms that are led by long-term substitute teachers, or teachers without the appropriate licensure to serve certain students or classes.

By consolidating classrooms, combining schools makes it more likely that classrooms will be led by permanent, fully-licensed educators. It also means that schools can direct their limited pool of FTEs not only to keep core classrooms at a minimum staffing level, but also to expand programming through specialists or other enrichment opportunities.

Finally, consolidating classrooms and stabilizing staffing levels will also improve educator retention by reducing burnout. When classrooms are led by long-term substitutes, other educators at that school often end up increasing their own workload. Since under-enrollment dynamics particularly affect schools with more Black and Latinx students, these staffing pressures may disproportionately affect educators of color. A well-staffed school helps to maintain sustainable workloads for educators and school staff, supporting the long-term retention of BPS’ dedicated educators.

Consolidating classrooms will not lead to educator layoffs. When reconfigurations do eliminate a particular position at a particular school, the Office of Human Capital will support that educator in finding an appropriate position elsewhere in BPS through individual, group and strategic matching support.

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In the Shaw-Taylor proposal and Philbrick-Sumner proposal, we describe these specific merger proposals in more detail. These school communities are playing an important role in the future of BPS. While they are preparing for their own joined community, they are also laying the foundation for the shifting landscape of BPS – in particular, by building a process for authentic community and family engagement to support school communities through transitions. We are committed to learning from this process, capturing what works well and discarding what doesn't, so that it can serve as a roadmap for the future as we engage in the deep strategic work of strengthening and supporting our District.

## Journey to a Joined Community

Any merger or school reconfiguration is disruptive. However, a disruption is not inherently negative. With adequate resources and support, disruptions can serve as a catalyst for positive change. We are focused on harnessing the energy of these disruptions to better serve students, families and staff within the school communities.

Understandably, there is a desire for all of the details to be mapped out prior to deciding whether the school communities should join together. However, as a district, we do not yet have a codified process for how to design and manage school mergers well. We have past examples and the experiences of those involved in those processes that we can learn from. We have knowledgeable, dedicated leaders, staff, and families that will be partners in this work. As we work with the School Design Teams to map out a journey to a joined school community, we commit to reflect, and refine, and record throughout the planning process to better support school communities experiencing reconfigurations or transitions in the future.

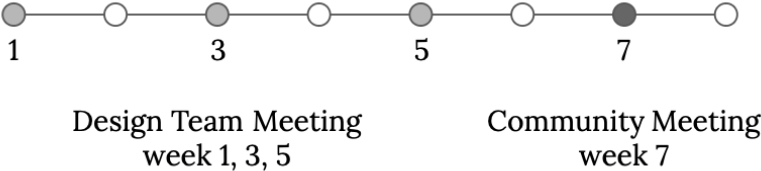
- **Reflect:** identify what worked well, what didn't, and what we've learned
- **Refine:** shift how we engage in planning, design, and implementation based on our reflections
- **Record:** capture and codify the process for bringing school communities together, providing a foundation for future reconfigurations or transitions

We also commit to providing concrete support to the Philbrick-Sumner and Shaw-Taylor communities as they engage on a journey to becoming a joined school community. Below, we have laid out the major buckets of work, our commitments, and a proposed planning schedule. Throughout the process, we will be nimble enough to course correct as we learn.

## Strategy for Community Engagement

Over the past few months, the two Design Teams, Philbrick-Sumner and Shaw-Taylor, have been meeting weekly. If this proposal is approved by the Boston School Committee, the

Design Teams will shift to a biweekly meeting cadence for the remainder of SY22-23, into SY23-24 and potentially SY24-25. Every fourth meeting (roughly every two months), BPS will host a combined School Community Meeting to report on progress, gather feedback, and invite in the broader community as thought partners. Establishing a steady routine sets clear expectations for engagement and allows for a clear, predictable cycle of communication, which works to build public trust.



The Capital Planning team, in partnership with the Division of Equity, Family, and Community Advancement, will increase and improve our outreach and be strategic and nimble to respond to community feedback. We know from the attendance at our community meetings that we are not reaching all members of our community. While we will continue to host community meetings, both in-person and virtually, we will also shift our practices to reach a wider demographic. This includes increasing the number of language-specific community meetings, for example, meetings hosted in Spanish or Haitian Creole. The Capital Planning team will partner closely with school staff who serve students and families everyday, such as family liaisons and teachers, and leverage methods of communication already deployed by schools, such as ClassDojo, Talking Points, and text messaging, as well as sending flyers home, posting in frequented public spaces, communicating in school newsletters, and using social media. We also recognize the importance of in-person conversations and connections to share information, learn from experiences, and receive feedback and concerns. These conversations will take place in schools and in community spaces where people gather outside of school buildings, such as community centers, libraries, and grocery stores. We will also capitalize on meetings that already routinely occur, such as school site council meetings.

Co-Creating a Joined Community

There are many facets that go into creating a successful school. Below, we describe the major buckets of work to build a joined community. This is not an exhaustive list; there will be topics of importance to explore that will arise organically as the school communities plan together. As new topics arise, the Capital Planning team will partner with the Design Team and school communities to identify the supports needed to plan for a school community that better serves students, families, and staff. This proposed schedule lays out

a linear process, but since these topics are intertwined, the process must be iterative over time.

### Shared Core Values



The Shaw-Taylor Design Team and the Philbrick-Sumner Design Team have each been working to shape Core Values for a joined school community. We are asking two communities, each with their own guiding values, to become a single unified community. They must therefore agree upon shared beliefs and values to guide the new joined school community.

As we have engaged in the process of forming Core Values, the question has arisen, “When will we begin doing the real work?” It’s important to acknowledge that the time and energy needed to form a foundation of shared beliefs is the work. As difficult decisions arise, and they will throughout this process, Core Values will serve to root future decision-making in how we better serve students, families, and school communities.

Over multiple sessions, members of each Design Team worked to form draft Core Values for a joined school community. They began by reflecting on the beliefs, assets, and values of their current school community guided by questions such as, *What do we want for our students? What do we believe all students should have? What are the assets of our community? What do we value?* They then came together to explore, *If our new combined school community gave students everything they needed to be successful, what would that look like? What are our shared values, principles, beliefs?* Together, they mined their responses to identify patterns and themes grounded in evidence. Using all of this, they crafted draft Core Value statements to serve as the foundation for a joined school community, learning about each other’s communities and beginning to build relationships along the way.

We shared the draft Core Values with the broader Philbrick, Sumner, Shaw and Taylor communities during virtual community meetings on April 4, 2023, where we broke into small groups to share feedback on what resonated, what was missing, and what to add. We are using follow-up surveys with the school communities to solicit feedback from a broader audience about the Core Values and about preferred methods of engagement. The Design Teams will use the feedback to further refine the [Core Values](#) and, in partnership with the Capital Planning team, refine community engagement practices.





**Alignment of Curriculum, Continuum of Service PreK-6:** Academics are core to the purpose and learning experience of students in school. Along with Core Values, this bucket of work drives the mission of the school. The joining schools will engage as partners to determine academic vision, choose complementary District-approved curricula, and build an intentional alignment of learning from grade K0-6. This is an opportunity for the school communities to consider which students in their communities are currently being underserved and shift their practices accordingly.

*Commitment:* The Departments of Schools & Accountability and Teaching & Learning will support schools in understanding their options for choosing a District-approved academic curriculum. The Office of Opportunity Gaps will support the Design Team and school communities, guided by the Racial Equity Planning Tool (REPT), in understanding the demographics of the joined school community, determining which students are being underserved, and identifying and aligning strategies to better serve them.

**Expanding Academic Programming and Enrichment:** Joining the school communities provides an opportunity to consolidate classrooms previously under-enrolled. Consolidating classrooms provides the joined school community an opportunity to shift the way the full-time equivalent positions (FTEs) and funds are allocated to align with the academic vision of the school. For example, if the joined school community is interested in expanding enrichment opportunities in relation to STEM offerings, they may make a case for an FTE being allocated to a STEM educator. Academic programming is often limited because the school lacks the staff members to run the programming. Additional or shifted FTEs provide an opportunity for schools to expand the academic and enrichment programs their students experience.

*Commitment:* The Department of Teaching & Learning will support merging school communities to understand the realistic options for expanding academic programming, as informed by budget and space. This includes helping school communities envision what is possible and building an understanding of what a program entails, such as the curriculum and materials needed. The Office of Opportunity Gaps will support the Design Team and school communities, guided by the REPT, in making strategic decisions grounded in serving more equitably.

**Inclusion:** The 2021-2024 BPS-BTU collective bargaining agreement establishes a historic commitment to reforming special education and ensuring District-wide inclusive practices. The Office of Special Education supports this work across the district and is currently working with schools to build models for support, planning, and implementation. Core to this mission is establishing school-based Inclusion Planning Teams to engage in the work of building structures and practices to sustain and foster a fully inclusive culture.

*Commitment:* The Office of Special Education will support each joined school community in forming an Inclusion Planning Team. The joined school community will receive new resources in alignment with the citywide \$50 million multi-year commitment to support the successful implementation of inclusion. The Shaw-Taylor community will begin this work as early as the summer of 2023 to form a joint implementation plan. The Philbrick-Sumner community will begin in the Fall of 2023.

**Assets, Shifts, and Building School Culture:** Each school brings assets: pieces of their school climate, culture, and programming that serve students, families, and staff well. In coming together as a joined community, it is imperative that such assets are elevated and that each community makes intentional decisions about what assets become integrated into the joined school culture. There are also components of each school community that are not working as well. Identifying these shortfalls is equally important, as this allows the two communities to examine and intentionally release what the joined community chooses to leave behind. Throughout, the team will question, *How do our choices and direction help us better serve our students who we have identified as being traditionally underserved? Do they align to the Core Values we have identified for our joined community?* In elevating assets and school culture, the joining school communities will consider current programming and practices in relation to areas such as before-and-after school services, building strategic community partnerships, intentionally inviting in family partners, and building a culture that is culturally-affirming and intentional about accessibility.

*Commitment:* The Capital Planning team will partner with the Design Team and school communities with the supports needed as topics arise. The Office of Opportunity Gaps will support the Design Team and school communities, guided by the REPT, in making strategic decisions grounded in serving more equitably.

Budget Planning, Resource Advocacy & Allocation, and Community Partnerships



Each school has an allotted budget determined in large part by the students the school serves. Much of the budget allocation is used primarily to fund staffing positions. Remaining funds are directed at the discretion of the school leadership, in partnership with the School Site Council. Resource allocation is most effective when aligned to the implementation of a clear mission designed to best serve students, families, and staff.

While the timeline above shows this proposed schedule lays out a linear process, resource allocation and school design are tightly interwoven, so conversations around resources will begin earlier to ensure budget-related decision-making is informed and realistic. For example, the addition of enrichment programs are linked to the academic vision of the school as well as available funding for the staff and resources needed to run the program.

Student and staff configurations also affect budgetary decisions. Joining schools often allows for the consolidation of students and classrooms and therefore a shift in teacher positions and resource distribution. For example, a school may choose to reallocate funds for an FTE to support the addition of an enrichment offering such as art. These decisions will then inform staffing, the next bucket of work.

A school's allocated budget is not the sole source of resources. As the joined community lays out the vision for their school, they can be intentional about seeking additional resources, such as through new or expanded community partnerships to support the work.

*Commitment:* We commit to supporting the joined school communities in developing a budget that sustainably aligns their use of resources to their strategic mission. The Finance Department will support school leadership in understanding how the above decisions affect the school's budget.

### Staffing

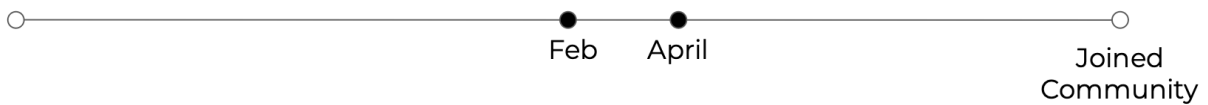


The staffing of a school should directly support the mission of the school. Bringing two school communities together requires an evaluation of staffing to fit the structure, vision, and needs of the joined school community. For example, joining schools may allow for the consolidation of classrooms, which results in changing staffing needs. The process of shifting positions is not easy and naturally may raise anxiety. We will build a process where teachers and staff feel and are supported throughout the transition. This process will occur in close partnership, being both proactive and collaborative, between the BTU and the

Office of Human Capital, the Department of Schools and Accountability, and the Division of Equity, Strategy & Opportunity Gaps.

*Commitment:* Staff in school communities that are undergoing a merger will know staffing decisions prior to the BPS hiring period directly before the implementation of the merger. Staff in joining schools will be supported throughout the transition. OHC will meet with staff undergoing shifts individually and in groups to provide strategic matching support through this process.

### Operations



BPS has shifted to a regional model of support for schools, which includes a regional Operational Leader who partners with the regional School Superintendent. The Operational Leader supports the daily operations and urgent needs of the schools they serve. Schools going through mergers will have an extra layer of support provided by Project Manager on the Capital Planning team. The Project Manager oversees the process as the school communities engage in preparations to come together. Each school community is different, so the Project Manager will be an important partner in connecting the joined school communities to various BPS Operations departments, such as Facilities, Food & Nutrition Services, Transportation, and Technology, as support is needed. The Operational Leaders and Project Managers will complement each other's work, one focusing on the current building operations and the other more future-facing.

*Commitment:* The Capital Planning Project Manager will be attentive to the needs of the joining schools, help to identify operational challenges, and connect the school to the appropriate BPS department as topics and problems arise to reduce barriers and solve problems.

### Preparing for Transition



Transitions can be difficult and disrupt learning. Therefore, in this process, it will be vital to give attention and plan support for how we transition students, families, and staff. This process will look different depending on the transition and therefore will be unique to each

community. This is an opportunity to learn from communities that have gone through similar processes to understand how to best support the transitioning school community. While preparing for the transition sits towards the end of this proposed schedule, we will also plan events that prepare the communities to join together throughout to provide spaces for students, families, and staff to get to know one another.

*Commitment:* The Capital Planning team will work in close partnership with the Design Team and school communities to build opportunities for learning and community-building events that facilitate smooth transitions.