Chittenden South Supervisory Union
Act 46 Study Committee Report:
Findings and Recommendations

prepared for
The Vermont State Board of Education

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Chittenden South Supervisory Union Act 46 Study Report

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CSSU Act 46 Study Committee Members

Members were appointed by local district boards, in proportion to school-age populations and with the intention of including individuals with Champlain Valley Union (CVU) High School Board affiliation.

(2) Charlotte	Erik Beal (Charlotte and CSSU Boards)
	Mark McDermott (Charlotte and CSSU Boards)
(2) Hinesburg	Colleen MacKinnon (Hinesburg and CSSU Boards)
	Keith Roberts (Hinesburg and CSSU Boards)
(3) Shelburne	Dave Connery (Shelburne and CSSU Boards)
	Russ Caffry (former Shelburne and CSSU Boards)
	Tim Williams (Shelburne Board)
(1) St. George	Kelly Bowen (St. George and CSSU Boards)
	Eric Hunter (St. George Board / serving as alternate)
(4) Williston	Kevin Mara (Williston and CSSU Boards)
	Karen Maklad (Williston Board)
	Jeanne Jensen (CVU and CSSU Boards)
	Gene McCue (CVU Board and Williston Resident)

Act 46 Implementation Project Consultant
Michael Deweese

Committee Chair Colleen MacKinnon

Administration/ Ex Officio
Elaine Pinckney (Superintendent)
Bob Mason (Chief Operations Officer)
Megan Roy (Director of Student Support Services)
Sandy Raymond (Executive Assistant to the Superintendent)

Legal Counsel Christopher Leopold

Executive Summary

The Chittenden South Supervisory Union (CSSU) consists of the Towns of Charlotte, Hinesburg, Shelburne, St. George, and Williston. Three school districts each operate one PK-8 school (Charlotte, Hinesburg, and Shelburne); one district operates two schools for PK-8 students (Williston); and one union district operates a high school for grades 9-12 (Champlain Valley Union High School). St. George is a non-operating district and is currently under contract with Williston for schooling K-8, and allows for school choice for grades 9-12. Based on fall 2015 counts, the combined average daily membership (ADM) for all CSSU districts was 4187, with Charlotte operating the smallest school at 421 equalized pupils.

Together with the supervisory union (SU) board, the seven boards in CSSU govern one of the largest SUs in the state with nearly 900 employees and combined budgets totaling over $70 million. Approximately one-third of the PK-12 students in CSSU attend Champlain Valley Union High School (CVU), which operates under the authority of a shared governance structure. The CVU and CSSU budgets together represent two-thirds of the SU's combined budgets, which have been adopted and managed through centralized systems. The SU's long history of coordinating operational and curricular activities provides conditions for systemic efficiencies and seamless educational transitions for CVU students coming from the SU's four sending districts. Implications of further consolidating governance is the topic of this study.

In response to Act 46 of 2015 ("an act relating to making amendments to education funding, education spending, and education governance"), board members of CSSU agreed to form an Act 46 Study Committee. In September of 2015, boards of CSSU appointed representatives to a committee in accordance with 16 V.S.A. §706. In order to maximize State funding allocated for consolidation, the study committee's goal is to bring a vote to communities prior to June 30, 2016. This commitment allowed the committee to secure a State grant of up to $20,000 to hire consultants and, with an affirmative vote, additional transition funds would be made available of up to a total of $150,000. In addition, tax incentives of .10/ .08 / .06 / .04 / and .02 would be credited to a consolidated district for the first five years.

Between September 28, 2015 and March 29, 2016, members of the CSSU Act 46 Study Committee met 34 times: 13 full study committee meetings; 16 subcommittee meetings organized around communications, finance, and governance; and five public forums to hear community concerns. Subcommittee findings and recommendations were brought to the full study committee for review, deliberation, and adoption.

Current findings of the CSSU Act 46 Study Committee (hereinafter the "Committee") reiterate findings from earlier CSSU study committees that had also focused on sharing resources across districts. The 2011 Regional Education District Study Committee and

the 2007-2008 Optional School Governance Structures Committee each recommended strategies for greater coordination, which have continued to improve operational efficiencies and integrated systems for educational programs. With widespread agreement about the success of consolidated planning during the past 10-15 years, questions related to a need for taking additional steps towards merging governance and tax rates understandably emerged for the Committee, with statements often focused on concerns about losing local voice.

Other topics of concern evolved around questions of equity and fairness of a consolidated budget and the transfer of all assets and liabilities to one new governing district. Financial analyses demonstrated that for some districts, a move to a consolidated district would initially have a more positive impact on tax rates than for others. For example, using a model produced by the District Management Council and supplied by the Act 46 Implementation Project, the impact of a blended tax rate in Williston might offset the benefit of the tax rate incentive. Taxpayers would see a tax reduction of only $73 on $100,000 valuation over the five-years of the incentive versus Charlotte's reduction of $802. However, when considering potential building bonds, a review of assets and liabilities (including deferred capital investments) forecasts that Williston could see a tax advantage of over $1 million with consolidation, which would somewhat erode the tax savings seen in Hinesburg and Charlotte.

The Committee also examined potential educational benefits for students. Building on current practices, analyses suggest that greater operational efficiencies could provide more time for principals to focus on instructional activities, which in turn have a direct impact on students.

For example, the recent consolidation of special education services (as required by Act 153) has resulted in both operational efficiencies and greater staffing flexibility. With special education coordinated centrally, CSSU's leadership can better engage local leadership in examining practices across schools. When looking at commonalities and differences, educators can consider with their peers how particular practices are integrated into a system where what happens in one school might have an impact on another school. This collaboration also helps to reveal innovative opportunities. In an integrated system, educators are asked to consider ways that their locally adopted instructional activities (a) align with best practices, (b) comply with regulations and standards, and (c) use shared resources in ways that can absorb fluctuations in levels of student needs from school to school.

In a fully consolidated district, benefits gained by examining practices and sharing resources might be further maximized for non-special education program delivery. In addition, with consolidation, administrators could develop systems that allow for greater flexibility in student placement and provide for targeted innovations.

Overall, studies of financial and educational aspects of consolidation suggest that a merged governance structure would be a natural progression for the SU. A merged board

could build on the success of boards working together over the last decade to improve educational programs and reduce costs through the centralization of services.

The Committee also recognized concerns related to the fear of losing "local voice" and proposed mechanisms for engaging local constituents. Although the Committee acknowledges the authority of a future consolidated board to adopt policy and practices, the study committee is advancing recommendations to address local input into future budget development, policy, administrative hiring, facilities improvements, and for other decisions that might have a direct impact on a local community. Planning for a fully operational district would occur during the first year following a vote, with existing boards maintaining authority over local budgets and policy.

If voters approve the proposal for consolidating governance, a 12-member board would replace the seven current governing bodies. The initial members would be nominated by and from the electorate of the individual towns, with the number to be elected by a single town being closely proportional to the fraction the town population bears to the total population of a new Unified District as determined by the 2010 federal census. The Committee identifies the districts of Charlotte, Hinesburg, Shelburne, and Williston as "necessary" districts and St. George (with no operating school) is identified as "advisable" pursuant to 16 V.S.A. § 706b(b)(1).

On March 29, 2016, the CSSU Act 46 Study Committee voted to accept this report and Articles of Agreement. Upon approval by the State Board of Education, the question of whether to form a Unified District will be presented to the voters of Charlotte, Hinesburg, Shelburne, St. George, and Williston, with votes to be held by Australian ballot on Tuesday, June 7, 2016.

If voters in each of the necessary districts approve a merger, a new unified district to be known as the "Champlain Valley School District" would begin operation on July 1, 2017. The study committee strongly advocates for the State Board of Education to designate the merged districts a supervisory district for administrative functions. No new district would be formed if any necessary district fails to vote in favor of the proposal.

If the necessary districts approve a merger and the voters of the advisable district (St. George) votes to remain independent, the St. George School District will have the opportunity to reconsider and join the Unified District by voting in favor of joining no later than November 30, 2016, with admission granted in advance by the Unified District. In the instance where St. George might vote to remain independent, the study committee advocates for the State Board of Education to designate the merged necessary districts as a *supervisory district*.

Processes and Topics of Study

Addressing Implications for CSSU of Act 46 of 2015

The CSSU Act 46 Study Committee was formed in response to 2015 legislation on school consolidation. On September 15th of 2015, each district board within Chittenden South Supervisory Union (CSSU) voted to join a study committee to look at consolidating districts of CSSU into one school district. The Charlotte, Hinesburg, Shelburne, St. George, and Williston School Boards each appointed representatives to the committee in accordance with Act 46 of 2015, "an act relating to making amendments to education funding, education spending, and education governance". This twelve-member committee includes representation from all member communities. On September 28, 2015, the CSSU Act 46 Study Committee convened for its first meeting.

The Committee's major task was to explore merging the current districts of CSSU into a single district in efforts to achieve goals as outlined in Section 2 of the Act.

(1) Provide substantial equity in the quality and variety of educational opportunities statewide;
(2) lead students to achieve or exceed the State's Education Quality Standards, adopted as rules by the State Board of Education at the direction of the General Assembly;
(3) maximize operational efficiencies through [increased] flexibility to manage, share, and transfer resources, with a goal of increasing the district-level ratio of students to full-time equivalent staff;
(4) promote transparency and accountability; and
(5) are delivered at a cost that parents, voters, and taxpayers value. (Act 46 of 2015, Section 2. Goals)

With the support of Act 46 Implementation Project Consultant, Dr. Michael Deweese, the CSSU Board charged the Committee to commence activities aimed at "[preparing] a report for the State Board of Education including all elements required by Title 16 §706b and Act 46 in the formation of a union district." (See Appendix A, *CSSU Act 46 Study Committee Charge* and Appendix B, *Letter to Education Secretary*.) Although legislation allows for a vote to occur by the end of June, the committee's charge reflects interest in allowing for a vote to occur prior to the end of the school year and summer recess.

Since organizing in September 2015, the Committee studied elements of each of the provisions of 16 V.S.A. §706b and implications for local districts that relate to curricular offerings, communications, governance, and schooling operations.

Congruent with the state's accelerated merger deadline of June 30, 2016, the Committee's timeline includes opportunities for community engagement prior to a vote. Study committee meetings have been conducted according to open meeting laws, and

additional public engagement strategies include a website, forums, and local media communications. Initial public forums were conducted in the fall of 2015, review and comments by local school boards solicited in January 2016, and subsequent public engagement activities will occur commencing in February 2016. The Committee is proposing a vote to occur on June 7, 2016 held by Australian ballot in each district.

Building on Prior CSSU Governance Studies

Prior committee work addressing school governance in CSSU provided a foundation for this current study, including the work of the 2011 Regional Education District (RED) Study Committee and the 2007-2008 Optional School Governance Structures Committee. (See Appendix C for *Executive Summaries*.)

Each of these committees similarly examined consolidating operations and governance in the supervisory union, with committee members determining that shared governance of schooling operations might prove beneficial. Although the 2011 RED Study Committee found merit in replacing the structure of seven boards with one consolidated governing board, committee members concluded at that time that the process faced significant political obstacles. Since then, revisions to state law allow for a more favorable climate and current SU board members perceive a greater demand for consideration of a voluntary merger of school districts.

The current Committee deliberated the provision of the law that requires necessary and advisable districts to be identified, including provisions for side-by-side and layered constructs. Because these other options would have little impact on the complexity of governance and minimal benefits, the Committee concluded that for a vote held prior to July 1, 2016, all districts identified as "necessary" would need to achieve an affirmative vote in order to move forward with consolidating governance structures.

The Committee's exploration of governance consolidation included re-examining earlier committees' agenda topics with updated data and current contexts. For expediency, the Committee delegated many tasks to subcommittees organized around communications, governance, and finances. Subcommittees brought information and recommendations to the full study committee for consideration, adoption, and approvals. A list of all meetings can be found in Appendix D.

More specifically, the CSSU Act 46 Study Committee reviewed elements required by legislation and of importance to member districts, including the following.

- Educational benefits
- Communications and public engagement
- Governance structures and board representation
- Financial issues related to taxes, distribution of assets and liabilities, and operations
- Roles and responsibilities of stakeholders
- Political and cultural contexts

- Staffing and contract issues
- Transition planning

All CSSU Act 46 Study Committee meetings have been held in compliance with open meeting laws. Full study committee meetings were broadcast via web-conferencing and meeting agendas, minutes, and supporting materials are available at http://act46.cssu.org/home.

Planning for an Accelerated Merger

Provisions of Act 46 related to tax incentives influenced committee members to work towards making available a vote by July 1, 2016. If approved by the voters in all five communities, the accelerated model would allocate tax rate credits over a five year period of .10 the first year, .08 the second, and in subsequent years .06, .04, and .02. In addition, a favorable vote would provide for additional grant funds up to $150,000 to support a transition.

Because of the significance of a vote to the member districts, the study committee adopted the following schedule.

> September 2015 – Formation of study committee
> October 2015 – Begin study activities
> November 2015 – Begin public engagement period
> December 2015 – Committee drafts report
> January 2016 – Local boards provide comment; committee revises report
> February 2016 – Submit report to the Agency of Education for review
> March 2016 – Advance a revised report to the State Board of Education
> April 2016 – State Board of Education reviews and acts on report
> May 2016 – Vote (adjusted to June at March 8, 2016 Study Committee Meeting)
> June 30, 2016 – Deadline for "accelerated merger" vote
> July 2016 – Transition start, if affirmative vote for consolidating governance
> July 2017 – Fully operational unified district, if an affirmative vote in 2016

Developing Guiding Principles and Articles of Agreement

During Committee deliberations, committee members periodically invoked guiding principles in support of the supervisory union's mission, framed around the key words of *Learn*, *Think*, *Live*, *Contribute*, and *Pursue Excellence*.

> The CSSU mission is to develop citizens who learn actively and collaboratively, think creatively and critically, live responsibly and respectfully, contribute positively to their community, [and] pursue excellence in their individual interests. (Adopted 2012)

Understanding the complex relationship community members have with their local schools, and the responsibilities for providing equitable opportunities for all students, the guiding principles agreed to by the Committee could suggest to a future board a framework for public accountability. These shared principles, articulated and repeatedly affirmed during Committee deliberations, can foster conditions that support confidence in the system's operations and educational quality.

- Use policies to ensure equitable opportunities, efficient use of resources, and flexibility for local initiatives.
- Offer programs that provide value to the community and at a cost that communities are willing to support.
- Promote transparency in systems that are understandable and allow for public accountability.
- Clarify roles and responsibilities that allow for high educational standards based on State and CSSU standards, and that allow for local input.
- Continue to provide ongoing board training to support a policy governance model.

With these guidelines at the forefront, the Committee agreed relatively early in the process to the following provisions for articles of merger.

- Necessary and advisable districts
    - Necessary districts: Charlotte, Hinesburg, Shelburne, Williston
    - Advisable district(s): St. George
- Grades of Operation: PK-12
- Assets/ Liabilities: to be shared, all transferring into one district
- Board size and election process
    - 12 members: (2) Charlotte, (2) Hinesburg, (3) Shelburne, (4) Williston, (1) St. George
    - Board members to be elected in the town they reside, and proportionally based on census data
- Association contracts
    - Honor existing contracts, and note that CSEA contract negotiations are scheduled to start fall 2016.
- School configurations/ student mobility /student placement issues:
    - Overall, study committee members want to provide some assurance of no immediate changes without creating unnecessary limits for sharing resources, and allowing for some mobility based on needs.
- Annual mechanisms for local input on policy and budget
    - Surveys, budget meetings in each district, use of budget buddies, more robust web presence, warning policies and discussing locally, focused presentations on policy or other topics, consider moving board meetings around district.

In summary, the proposed union school district would use policy to ensure the coordinated delivery of educational programs are (a) aligned with district goals, (b) informed by public engagement strategies, and (c) allow for local innovations in

congruence with a networked improvement system. These concepts are further defined in Findings of the Study Committee and by the Articles of Agreement, which the Study Committee recommends for adoption by the voters of each of CSSU's member districts.

Findings of Study Committee

Financial Accounting and Budgeting

Acting on recommendations from prior study committees and legislation such as Act 153, the boards of CSSU have already centralized services related to special education, transportation, negotiations, professional development, curriculum and assessment, human resources, policy, IT, and other functions. Therefore, some savings from consolidation have already been realized.

While accrued savings would be difficult to quantify given the10-15 years of intentional examination of how best to share resources, administrators and board members concur that the supervisory union has made significant gains in advancing a culture of coordinated activities.

Promoting Additional Efficiencies

For this Act 46 study, a review of potential additional operating efficiencies concludes that savings of approximately $1.5 million could be realized over five years in the following areas.

Tangible and Intangible Savings, per Year

Tangible

- Financial and clerical administration $42,000
- Auditing $15,000
- Food service $5000
- Board costs $5000

Intangible

- Facilities management $63,000
- Contract management $52,000
- Sharing of resources $118,000

As the special education processes for budgeting demonstrate, a single budget going before all voters in a unified district would require local school leaders to work together each budget cycle where sharing of best practices could lead to even greater savings. During the FY17 budget development process, the centralized approach to special education budgeting was able to capture efficiencies, which translated to dollars. Faced with a need to pull significant dollars out of the baseline budget at the board's request,

Central Office leadership facilitated a broad look at special education program delivery in all schools to identify $300,000 in reductions. By engaging professional staff in a common goal to identify ways to better share resources across districts, staff eventually put forth special education budgets in line with budget goals. While these saving have been realized for FY17 and would therefore likely not be duplicated for FY18, the lesson for board members and administrators was that the consolidated system resulted in more acceptable budgets for each district.

In addition, a single budget could provide a networked system for testing innovative practices in one or more schools that could serve to inform best practices for other schools in the system. For example, in the past few years, the SU introduced a multi-year professional development model for math instruction in one district before brining it to other schools in the SU. Similarly, innovations introduced on a smaller scale before being implemented in other districts have included Positive Behavioral Intervention and Supports (PBIS), after-school programming, a flexible teaching schedule model, grading systems, and introduction of 1:1 devices. With the positive experiences of learning from local initiatives, current board members and administrators advocate for policy in a shared governance structure that would allow for a continuation of these practices.

Considering Tax Implications

A review of assets and liabilities, including estimates of deferred maintenance, shows that with a consolidated system no district identified as necessary (Charlotte, Hinesburg, Shelburne, Williston) would gain or lose appreciably. The analysis showed that the recent positive bond vote in Shelburne and a projected bond vote in Williston would significantly even-out current discrepancies in costs per pupil built into the tax model.

Appendix E, *Tax Rate Implications Summary*, provides hypothetical tax rates for merged versus non-merged governance structures to allow for a simple comparison between the two scenarios. Appendix F, *Tax Rates Details by Town*, shows by town these same numbers in more detail. (Assumptions are for modeling purposes only and do not reflect actual tax rates.) To better demonstrate the implication of property transfer to a single governing body, a table of assets and liabilities, including deferred maintenance, is provided in Appendix G, *Assets and Liabilities Assessment*.

The study committee found that even with differences in property wealth from one town to the next, costs per pupil are relatively consistent across all districts in the supervisory union. However, district boards have sometimes faced budget challenges due to pronounced changes in per pupil spending from one year to the next, often in response to declining enrollments, specific population needs, or work-force demographics. In a unified district, enrollment changes would become more easily absorbed due to scale, thereby providing for equalized per pupil spending that is more stable and predictable than the current structure allows. A more stable and predictable budget could allow for educational leaders to bring greater focus to educational programming tied to local and district goals with multi-year agendas.

Ensuring Equity

Ensuring educational equity across the schools of a consolidated district would be tied to both policy and board priorities. For example, current annual budgeting activities address issues such as special education best practices; targeted class size ranges for each grade; superintendent recommendations for administration levels at each school; Vermont's Education Quality Standards; and other functions such as food service, transportation, and facilities improvements. With a single board, accountability for ensuring equity and access to educational opportunity would require systems for (a) promoting dialogue about local needs, (b) use of data for comparing and reporting progress towards goals, and (c) allowance for local variability based on cultural differences.

For CSSU board members, equitable access to high quality programming does not necessarily mean that each school must provide exactly the same experiences as long as outcomes remain comparable. Current board members highly value the unique activities that may emerge in a school, which can often serve to inform the whole system. For that reason, the Committee will also advance recommendations to a new board for ensuring that opportunities for local innovations are considered in policy and budgeting. (See Appendix H, *Budget Development Process Recommendations*.)

Improving Student Learning Opportunities

An essential outcome for centralized administration is raising the effectiveness of teachers. By bringing together resources from across all schools in the supervisory union and centralizing functions that (a) take specialized expertise and (b) consume significant time, central office can support all educators in the system. Implementation of 21st century learning opportunities could be advanced by sharing valuable resources such as curricular or operational expertise, technology, training, assessment planning, instructional coaching, and other professional development activities. By coordinating centrally, educational leaders can ensure resources are more specifically targeted to helping educators with their professional practice within the context of a highly complex learning organization.

During recent years, the CSSU member districts have been confronted with declining enrollments and state requirements for budget reductions, such as limitations imposed by the State's 2010 "Challenges for Change" and penalties for spending above state-defined thresholds. These state-imposed strategies for adjusting staffing levels to student enrollments have resulted in SU district boards making decisions to limit some programs and curtail opportunities for innovation within some schools. It should be noted that all of the SU's schools already have class sizes at the upper end of state-suggested limits and further consolidation is unlikely to result in significant staffing changes. Therefore, offsetting restrictions on programming due to budget constraints at a local level requires significant strategizing to ensure students enter CVU from any of the sending schools with comparable knowledge, skills, and dispositions.

With an interest in making the most of shared resources and improving instructional practices for the benefit of all students, educational leaders in CSSU have established a professional culture exemplified by collaboration. While great strides have been made across the SU, such as with a revised mission statement that drives decision-making for all schools, obstacles imposed by district boundaries restrict the ability to advance some common objectives. Educational leaders suggest that a merged governance system with greater flexibility to share human and material resources could result in even greater student learning opportunities.

For example, improved operational efficiencies could provide more time for principals to serve in their primary role as instructional leaders. By eliminating bureaucratic redundancies and centralizing supports, both teachers and principals could better focus on the essential work of schooling. Instructional leaders at the building level, with a strong understanding of historical context and local culture, could be better situated to take on multi-year planning in ways that build on strengths of stakeholders in the system. From an educational leader's perspective, more focused, undistracted time for principals to serve as instructional leaders means more dedicated time for meaningful supervision and evaluation. On a day-to-day basis, these activities translate to more opportunities for "walk-throughs" for unplanned observations of school activities, more time for capturing "data snap-shots", and more time in the classroom to support scaling up on proven innovations.

A single governing board could also provide more influence for greater coordination and implementation of curriculum and professional development across all schools. One board using a policy governance model for clarifying expectations for outcomes could support leadership practices that translate to cross-school accountability for performance measures. With a focus on continuous learning for both the adults and students in the organization, an integrated system could lead to improved student performance, narrowing of achievement gaps, and greater flexibility in learning opportunities.

In addition to the potential for leadership stability across a unified district due to desirable working conditions, a consolidated governance structure could enhance the ability to provide greater opportunities for full-time employment in those program areas with less than 1.0 FTE staffing needs at individual schools. The potential to share some staffing and programs more easily than current structures allow could contribute to greater stability for staffing and more opportunities for students. Similarly, while not on the agenda for current boards, greater flexibility in the organization presents the possibility for creating magnet programs or allowing for more student choice within a supervisory district.

With the consolidation of special education following implementation of Act 153 requirements, evidence of impact on students and learning within the supervisory union can be seen through a coordinated review of standards of practice, budgeting and financial oversight, and general sharing of resources. For example, as noted in the Financial Findings, special education consolidation has allowed CSSU's leadership to

examine practices across schools for alignment with best practices, compliance with regulations and standards, and to target resources in ways that can absorb fluctuations in levels of student needs from school to school. In a fully consolidated district, use of comparative data and collaborative practices could further maximize the use of shared resources in ways the separate districts structure does not fully support. Furthering work related to CSSU's Multi-Tiered System of Support (in support of *all* learners) is limited outside the formal structure of special education. In a consolidated system, activities that fall outside the list of allowable reimbursable expenses of special education could be extended in a more coordinated way.

Overall, Committee members anticipate that a unified governance structure could free up administrative time to focus on instructional leadership; enable greater coordination of curriculum across schools and across grades; improve systems for providing common and focused professional development; remove structural obstacles to considering processes for permitting students to attend elementary and middle school outside their town of residence; and by, sharing resources, allow for more flexibility to coordinate and implement shared curricular goals.

Transition Planning

With an affirmative vote on consolidating governance by all necessary and advisable districts, two governing bodies would operate with similar yet discrete functions during the first year, moving towards a fully operational consolidated supervisory district commencing a year later. Voters' authorization by July 1, 2016 to create a unified school district, encompassing all current member districts of Chittenden South Supervisory Union, would result in a single governing body for the operation of all schools serving grades PK-12, becoming fully operational July 1, 2017. The governing authority of pre-existing school districts of Charlotte, Hinesburg, Shelburne, St. George, and Williston would end at the close of business on June 30, 2017. (See Appendix I for *District Data*, Appendix J for *Proportional Representation*, and Appendix K for a *Summary Transition Plan*.)

If Charlotte, Hinesburg, Shelburne, and Williston all vote "yes", the forming districts would consolidate governance. Regardless of whether St. George, as an advisory district, votes "no" or "yes", the study committee is seeking designation as a *supervisory district* by the State Board of Education.

An affirmative vote would also result in the following governing provisions:

- Employees of the pre-existing districts and supervisory union who are offered continuing employment following their 2016-2017 employment contracts, consistent with legal requirements, would become employees of the new Unified School District.
- Assets of the pre-existing districts would be transferred to a Unified District for the sum of $1.00 as of July 1, 2017.

- Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the Unified District as of July 1, 2017.
- Through June 30, 2017, the seven pre-existing boards of the supervisory union would continue to govern their respective districts.
- Through June 30, 2017, the school board for the Unified District, consistent with law, would have responsibilities for the new Unified District including but not limited to (a) collective bargaining responsibilities; (b) policy development; (c) budget development for the 2017-2018 fiscal year; and (d) organizing the Unified District's 2017 Annual Meeting. On July 1, 2017, the Unified District Board would assume full and complete governance responsibilities for the Unified School District.

Consistent with statute, a new Unified District board would be charged with defining roles and responsibilities of stakeholders, hiring a superintendent, establishing policy, negotiating contracts, developing budgets, and establishing structures for community engagement. Prior to going to a vote on consolidation, the CSSU Act 46 Study Committee will continue to work with administrators to add definition to roles and responsibilities of a consolidated board, principals, superintendents, and local advisory functions.

References and Web Links

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Vermont Statutes Online, Title 16, Chapter 11: Union Schools and School Districts and Joint Schools. http://legislature.vermont.gov/statutes/chapter/16/011

Articles of Agreement

The Chittenden South Supervisory Union Act 46 Study Committee recommends that the following Articles of Agreement be adopted by each necessary and advisable school district for the creation of a Pre-kindergarten through Grade 12 unified union school district to be named the Champlain Valley School District, hereinafter referred to as "Unified District".

Article 1. Necessary Forming School Districts

The School Districts of Charlotte, Champlain Valley Union High School, Hinesburg, Shelburne and Williston are necessary for the establishment of the Champlain Valley School Unified Union School District (hereinafter the "Unified District"). The above referenced school districts are hereinafter referred to as the "forming districts".

Article 2. Advisable School Districts

The School District of St. George is advisable to include in the formation of the Unified District. If the St. George School District votes upon and approves the formation of the Unified District, then it is included within the definition of "forming districts."

Article 3. Grades to Operate

The Unified District will offer pre-kindergarten through grade twelve education to students in the Unified District.

If the voters of St. George approve formation of the Unified District, then St. George students enrolled and attending a public or an approved independent high school (grades 9-12) during the 2016-2017 school year at the expense of the St. George School District as tuitioned high school students shall be "grandfathered." Such tuitioned students shall be permitted the option to continue to attend the same public or approved independent high school as tuitioned students from the Unified District. Except as specifically approved by the Unified District's Board of School Directors, and consistent with state law, the tuitioning of grandfathered high school students shall cease on June 30, 2020.

Article 4. Proposed New School Construction and Use of Facilities

No new schools or major renovations to existing school facilities are necessary to, or proposed for the formation of the Unified District. The school district will operate existing school facilities commencing July 1, 2017.

The use of the Unified District school facilities, related facilities and property will be determined by the Unified District's Board of Directors (hereinafter "the Board") to most effectively and efficiently attain quality and equitable education for all students. The Unified District recognizes the long term financial investments and community

relationships that each town has with its school building(s). The Unified District will encourage appropriate use of the building(s) by the students and community according to the policies and procedures of the Unified District as overseen by the building administrator.

Article 5. Employee Contracts, Recognition and Collective Bargaining

The Board will comply with 16 VSA Chapter 53, subchapter 3, regarding the recognition of the representatives of employees of the respective forming districts as the representatives of the employees of the Unified District and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees. In the absence of new collective bargaining agreements on July 1, 2017, the Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, subchapter 3. The Board shall honor all individual employment contracts that are in place for the forming school districts on June 30, 2017 until their respective termination dates.

Article 6. Transportation and Standardization of Operations

The Board shall determine, in accordance with state and federal law, the transportation services to be provided to students in the Unified District.

The forming districts of the Unified District recognize the benefits to be gained from establishing district-wide curricula as well as their obligation to do so, and to otherwise standardize their operations on or before July 1, 2017.

Article 7. Special Funds and Indebtedness

A. Capital Debt
The Unified District shall assume all capital debt as may exist on June 30, 2017, including both principal and interest, of the forming school districts that join the Unified District.

B. Operating Fund Surpluses, Deficits and Reserve Funds
The Unified District shall assume any and all operating deficits, surpluses, and fund balances of any of the forming districts that may exist at the close of business on July 1, 2017. In addition, reserve funds will be transferred to the Unified District on June 30, 2017 and will be applied for such established purposes unless otherwise determined through the appropriate legal procedures.

C. Restricted Funds
The Chittenden South Supervisory Union and the forming school districts will transfer to the Unified District any preexisting specific endowments or other restricted accounts, including student activity and related accounts that may exist on June 30, 2017. Scholarship funds or similar accounts, held by school districts prior to June 30, 2017, that have specified conditions of use will be used in accordance with said provisions.

Article 8. Real and Personal Property

No later than June 30, 2017, the forming districts will convey to the Unified District, for the sum of One Dollar, and subject to all encumbrances of record, all of their school-related real and personal property, including all land, buildings and contents.

In the event that, and at such subsequent time as, the Board determines, in its discretion, that any of the real property, including land and buildings, conveyed to it by one or more of the forming districts is or are unnecessary to the continued operation of the Unified District and its educational programs, the Unified District shall convey such real property, for the sum of One Dollar, and subject to all encumbrances of record, the assumption or payment of all outstanding bonds and notes and the repayment of any school construction aid or grants as required by Vermont law, to the town in which it is located.

The conveyance of any of the above school properties shall be conditioned upon the town owning and utilizing the real property for community and public purposes for a minimum of five years. In the event a town elects to sell the real property prior to five years of ownership, the town shall compensate the Unified District for all capital improvements and renovations completed after the formation of the Unified District and prior to the sale to the town. In the event a town elects not to acquire ownership of such real property, the Unified District shall, pursuant to Vermont statutes, sell the property upon such terms and conditions as established by the Board.

In the event that, and at such subsequent time as, the Unified District determines that any real property, including land and buildings, conveyed to it by the Champlain Valley Union High School District is or are unnecessary to the continued operation of the Unified District and its educational programs, the Unified District shall, pursuant to Vermont statutes, sell the property upon such terms and conditions as established by the Board.

Beginning July 1, 2017, the Unified District will continue to use all schools existing on said date for a period of four (4) years, unless a majority vote of the electorate of the municipality in which the school is located approves a plan to close the school. After the expiration of the four-year period, decisions regarding the use of schools, including a plan to close a school, will be determined by policies and decisions of the Board of School Directors. The school closure provisions in this paragraph are not applicable to Champlain Valley Union High School.

Article 9. Board of School Directors

A forming town district's representation on the Board of School Directors will be closely proportional to the fraction that its population bears to the aggregate population of all forming school districts in the Unified District. Initial composition of the Board is based upon the 2010 Federal Census, and shall be recalculated promptly following the release

of each subsequent decennial census. At such time the Board shall also evaluate and consider the advisability of implementing a system of at-large voting for school directors.

The number of board members from each forming school district shall be determined by dividing the population of the town by one twelfth of the total population of the aggregate population of the towns within the Unified District. At no time will a town corresponding to a pre-existing forming school district have less than one board member.

The initial membership on the Unified District Board of School Directors will be as follows:

Town	Board Members, with St. George
Williston	4
Shelburne	3
Hinesburg	2
Charlotte	2
St. George	1
Total	12

If St. George does not vote to join the Unified District, the number of school board members by Town shall total 11.

Town	Board Members, without St. George
Williston	4
Shelburne	3
Hinesburg	2
Charlotte	2
Total	11

Article 10. School Directors – Elections and Terms

School Directors will be elected by Australian ballot for three-year terms, except for those initially elected at the time of the formation of the Unified District. Candidates will be elected by a vote of the electorate of the town such candidate(s) will represent on the Board. In the initial election of school directors, the terms of office will be as follows:

Town	2 Year Term	3 Year Term	4 Year Term
Charlotte	1	0	1
Hinesburg	0	1	1
Shelburne	1	1	1
St. George	0	1	0
Williston	2	1	1

Pursuant to the provisions of 16 VSA §706j(b), elected school directors shall be sworn in and assume the duties of their office. The term of office for Directors elected at the June 7, election shall be two, three, or four years respectively. For purposes hereof, the terms of office shall commence on the date of the Organizational Meeting of the Unified District (16 VSA §706j), when the initial school directors will begin their term of office, and end on the date of the Unified District's annual meeting in the spring of 2018, 2019, 2020 as established under 16 VSA §706j. Thereafter, terms of office shall begin and expire on the date of the Unified District's annual meeting.

Article 11. Vote to Establish Unified District and Election of School Directors

The proposal to establish the Unified District will be presented to the voters of each forming school district on June 7, 2016. The candidates for the Board will be elected on the same date, as required by law.

Pursuant to 16 VSA §706e (b), nominations for the office of school director representing any district/town shall be made by filing with the clerk of that school district/town proposed as a member of the Unified District, a statement of nomination signed by at least 30 voters in that district or one percent of the legal voters in the district, whichever is less, and accepted in writing by the nominee. A statement shall be filed not less than 30 nor more than 40 days prior to the date of the vote.

Article 12. Establishment of Unified District and Operating Authority

Upon an affirmative vote of the electorates of the school districts, and upon compliance with 16 VSA §706g, the Unified District shall have and exercise all of the authority which is necessary in order for it to prepare for full educational operations beginning on July 1, 2017. The Unified District shall, between the date of its organizational meeting under 16 VSA §706j and June 30, 2017: develop school district policies; adopt curriculum, educational programs, assessment measures and reporting procedures in order to fulfill the Education Quality Standards (State Board Rule 2000); prepare for and negotiate contractual agreements; set the school calendar for Fiscal Year 2018; prepare and present the budget for Fiscal Year 2018; prepare for the Unified District Annual Meeting(s); and transact any other lawful business that comes before the Board, provided, however, that the exercise of such authority by the Unified District shall not be construed to limit or alter the authority and/or responsibilities of the School Districts of Williston, Shelburne, Hinesburg, Charlotte, St. George and Champlain Valley Union High School. Upon designation and certification pursuant to 16 V.S.A. §706g, the Unified District shall be designated a supervisory district with an effective date of July 1, 2017.

Article 13. Annual Budgets and Australian Ballot Voting

The Board shall propose annual budgets in accordance with 16 VSA Chapter 11.

The annual budget vote shall be conducted by Australian ballot pursuant to 17 VSA Chapter 55.

Article 14. Forming School Districts Cease to Exist

On July 1, 2017, when the Unified District becomes fully operational and begins to provide educational services to students, the school districts of the forming towns shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the Unified District under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2017. Upon the completion of outstanding business or December 31, 2017, whichever date is earlier, the forming school districts shall cease to exist pursuant to 16 VSA §722. The Chittenden South Supervisory Union shall cease all operations within a reasonable timeframe of the completion of all outstanding business of its member school districts, but in no event any later than January 31, 2018.

Article 15. School Attendance and Enrollment During First Year

For at least the first year that the Unified District is fully operational and providing educational services, students will attend elementary school and middle school according to their town/district of residence; provided however, with parental consent, the Board may adjust student enrollment based upon individual student circumstances and needs of the Unified District. Consistent with the current St. George/ Williston contract, St. George elementary and middle school students will attend Williston schools the first year. After July 1, 2018, the Board will have the authority to adjust school attendance boundary lines and school configurations within the Unified District.

Article 16. Input on Policy and Budget Development

The Board shall provide opportunity for local input on policy and budget development. Structures to support and encourage public participation within the Unified District will be established by the Board on or before June 30, 2017.

Article 17. Subsequent Admission

If the St. George School District votes to remain independent, it will have the opportunity to reconsider and join the Unified District by voting in favor of joining no later than November 30, 2016, with admission granted in advance by the Unified District. For purposes of compliance with 16 VSA §721, the Unified District consents to admission, with an effective date of July 1, 2017.

Appendixes

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Appendix A
Committee and Subcommittee Charges

A1 - CSSU Act 46 Study Committee Charge

Study Committee Charge presented at 9/15/15 meetings:
Move to form a study committee with the member districts of the Chittenden South Supervisory Union which choose to participate. Committee membership shall be in compliance with Title 16 §706. The charge of the committee is as follows:

I. In accordance with Title 16 §706b, Act 46, and Acts 153/156, study the benefits and challenges of forming a union district comprising the participating towns of the SU.
II. Contract with outside person(s) to support the work of the committee within the established budget. This may include but is not limited to: process facilitation, data analysis, facilitation of committee discussions, legal counsel and community forum support.
III. Make a determination as to whether the formation of a union district is advisable and should be taken to the voters. Should the committee recommend the decision be taken to the voters, recommend also the timing of the vote.
IV. Prepare a report for the State Board of Education including all elements required by Title 16 §706b and Act 46 in the formation of a union district. The report should be submitted in a timely fashion to allow for a community vote, if held, to occur prior to June 1st, 2016.
V. Develop the Articles of Agreement required in Title 16 §706b
VI. Keep the SU Board regularly apprised of the committee's progress. Specifically: the committee work plan (no later than 10/20/15) , community engagement plan, draft articles of agreement, summary of financial implications to individual communities, summary of committee's decision criteria and final report and recommendation.

A2 - SUBCOMMITEE Charges

Communications Subcommittee Charge
Develop recommendations for the full CSSU Act 46 Study Committee related to community engagement. Tasks may include creating content for consistent and accurate messaging (e.g., FAQs); developing electronic media (e.g., website) to use centralized portals for information sharing; recommending use of current structures to gain efficiencies (e.g., use of regular board meetings and channeling through board chairs); and other means to promote information sharing.

Governance Subcommittee Charge
Develop recommendations for the full CSSU Act 46 Study Committee related to governance. Recommendations may address elected representation of a consolidated district; roles and responsibilities such as local advisories; and board roles in transitions to a consolidated system. In addition, the Governance Subcommittee may be used in some drafting of "articles of merger/agreement".

Financial Subcommittee Charge
Develop recommendations for the full CSSU Act 46 Study Committee related to better understanding and communicating financial questions. The subcommittee's work will draw on state resources where available and be guided by Central Office administration. Tasks to address financial modeling to communicate about tax implications, distribution of assets and liabilities, allocation of capital and operating expenses, and development of a pro forma budget process for a consolidated district.

Appendix B
Letter Regarding Formation of Committee

Colleen T. MacKinnon, Director, Hinesburg School District
c/o Chittenden South Supervisory Union
5420 Shelburne Road, Shelburne, VT 05482

Rebecca Holcombe, Secretary of Education
Vermont Agency of Education
219 North Main Street, Suite 402
Barre, Vermont 05641
(802) 479-1030

September 29, 2015

Dear Secretary Holcombe,

Pursuant to 16 VSA §706b (a), this letter informs you of my appointment, effective September 28, 2015, as Chair of the Chittenden South Act 46 Study Committee.

Comprised of representatives from the Charlotte, Hinesburg, Shelburne, St. George, and Williston school districts, our committee has begun its work to study components of merger articles for our districts and to prepare a report with the guidance of our VSBA Consultant, Dr. Michael Deweese.

We look forward to the support of your Agency as we undertake our work.

Respectfully,

Colleen T. MacKinnon, Ed.D.
Chair CSSU Act 46 Study Committee

CC:
Nikki South, Act 46 Implementation Project Director, nsouth@vtvsba.org
Michael Deweese, VSBA Consultant, mdeweese@myfairpoint.net
Elaine Pinckney, Superintendent, CSSU, epinckney@cssu.org
Sandy Raymond, Executive Assistant to the Superintendent, sraymond@cssu.org
Jeanne Jensen, Chair CSSU Board, jeanneinvt@gmail.com
Polly Malik, Champlain Valley Union School Board of Directors, ptmalik@cssu.org
Kristin Wright, Charlotte School Board of Directors, krwright@cssu.org
Keith Roberts, Chair, Hinesburg School Board of Directors,
keithrobertshcsboard@hotmail.com
Dave Connery, Chair, Shelburne School Board of Directors
Kevin Mara, Chair, Williston School Board of Directors, kmara@cssu.org
Kelly Bowen, Chair, St. George School Board of Directors, kbowen@cssu.org

Chittenden South
Study Committee
Final Report
November 15, 2011

The Chittenden South Supervisory Union (CSSU) Boards of School Directors from each of the member communities, representing approximately 4,500 students from prekindergarten through grade 12, agreed to establish a Study Committee in accordance with state law (VSA Title 16 Section 706) and the recently enacted Act 153 legislation.

The Committee was charged to "conduct a comprehensive analysis of a potential merger – a single board, Prekindergarten through Grade 12, regional education district (RED) incorporating the member towns and school districts."

The Study Committee met twelve times from February through November 2011.

The Study Committee was composed of twelve community members (seven of whom are current school board members) from each of the member towns. Additionally, Superintendent Elaine Pinckney and Chief Operations Officer Bob Mason served as staff for the Committee along with executive administrative assistant Sandy Raymond and former CSSU Superintendent, Brian O'Regan, who served as facilitator. Zoe Erdman of Williston served as the Study Committee Chairperson.

In addition to an extensive review of current national research on school mergers and consolidation, the Study Committee used the Act 153 template provided by the Department of Education to guide some of the discussions and to organize informational data. The Study Committee also used the statutorily required (T16§706b) articles of agreement as the framework for addressing issues essential to the formation of a proposed union of schools which is what a RED would represent. These include:

1. *The names of school districts necessary*
2. *The names of additional school districts advisable*
3. *The grades to be operated*
4. *The cost and general location of any proposed new schools*
5. *First year plan for the transportation, staff, and curriculum consistent with existing contracts, collective bargaining agreements, or other provisions of law*
6. *Debt to be assumed*
7. *Acquisition of assets*
8. *Budget plan*
9. *Board Representation*
10. *Terms of Board Members*
11. *The date of the vote by communities*
12. *Date Champlain Valley RED will begin operating*
13. *Any other matters the committee considers pertinent, including whether votes on the union school district budget or public questions shall be by Australian ballot.*

The Study Committee investigated and reviewed issues related to each of these thirteen components. While general agreement was achieved for many of these components, when considered in their entirety, the Committee was unable to reach consensus on recommending the formation of a Regional Education District to the voters of the Chittenden South communities.

The Study Committee focused on three primary areas: cost efficiency, student benefit and governance. The Committee acknowledged the consolidation of operational and educational program services was a deliberate focus among CSSU School Boards and administrative leadership for over the past decade. The Committee reviewed documents from a 2007-2008 governance study specifically identifying areas in which the supervisory union had consolidated or established collaborative practices for the purpose of improving efficiencies and reducing expenses. General agreement held that much had been done to establish more efficient and collaborative practices. Efforts to increase these efficiencies were viewed as possible without the need to create a RED.

A second focus area addressed by the Committee was "How will the creation of a RED positively impact the learning opportunities and student achievement for the approximately 4500 Prekindergarten – Grade 12 pupils?" While extensive discussion occurred, the conclusions were not viewed as compelling enough to cause the Committee to vote favorably regarding the formation of a RED. Historical CSSU student performance data was compared with both single K-12 district and multi-town supervisory union governance structures across the region and the state. No notable differences were identified among students attending supervisory union school systems and single supervisory districts. Similar to the area of cost efficiencies achievable in operations, Committee members believed improved student learning opportunities could be created within the context of the current governance structure.

Given the organizational design of a RED, the change in governance structure was a significant topic of concern for some Committee members. While the Committee ultimately agreed to the concept of an eighteen-member board with proportional representation based on community population and in accordance with state law, concern still existed regarding greater voice by one community over another. Additionally, the concept of establishing Local Community Councils for each member district was studied extensively but the absence of legal authority of these councils remained a concern for some.

Acknowledging the financial incentives associated with the implementation of Act 153, the Study Committee, found the incentives to have a short timeline and varying impact on local community tax rates.

In brief, the communities of Charlotte, Hinesburg, Saint George, Shelburne and Williston, with no changes to the FY 2011 financial information and the four year tax incentive accompanying Act 153, would have seen an estimated reduction in spending of $6.6 million dollars over 5 years and an estimated savings of $8.2M over ten years. Variations among the communities were of concern to Committee members as Charlotte was estimated to save $3.1M in five years compared to Williston's $597,000 savings over the same time period. Homestead tax rates, in five years and with a RED in place, would be approximately six cents ***less*** for the Charlotte, Hinesburg and St. George communities and 1.7 cents and 2.6 cents ***more*** for Shelburne and

Williston respectively compared to maintaining the current governance and taxing structure. Over ten years, Williston and Shelburne were perceived losers from a tax and financial perspective. Concern was also expressed throughout the study process of the state's ability to sustain the financial incentives over an extended period of time.

The RED would have assumed all of the $27 million debt currently on the books for the current member school districts along with the $52 million in assets.

In summary, the Study Committee was unable to reach consensus due to strong and shifting opinions regarding the formation of a RED. The Committee did not agree that the reduction in overall taxpayer investment, the further clarity in administrative and governance responsibilities and the possibility of improved student learning opportunities and outcomes were compelling enough reasons to eliminate local school board voice and authority.

Recommendations:

The CSSU Study Committee found the issues addressed throughout this seven month process far-ranging, complex and informative. The following recommendations are made with the notion that future studies might bring communities closer to a regional governance structure that makes most sense for multiple local communities.

1. Greater specificity about the "authority" of local structures designed to be responsive to Act 153's requirement of local community voice on budget and policy issues needs to be provided by the state.
2. Merger incentives should be varied and simplified. While a tax rate incentive as outlined in Act 153 appears straightforward, 5% limitations and variations among the member communities considering a RED cause for real and perceived disparities that create a sense of "disincentive" for some communities. A direct cash incentive over time would be another option.
3. Articles of Agreement should be able to extend the period of time that schools will not be closed.
4. Greater specificity of what constitutes "increased educational opportunities" and performance outcomes for students as outlined in Act 153 would be helpful to the study committee. Additionally, greater technical assistance in gathering student performance and opportunity data would be an asset to a committee, comprised largely of community members, in understanding how these opportunities and outcomes would be an improvement over current practice.
5. Clarity of organizational reporting responsibilities within current supervisory union structures warrants attention at a state level. The challenges associated with a governance structure in which roles and responsibilities between and among the supervisory and local school boards, superintendent and principals are at best confusing. The leadership time invested in governance and administration activities overshadows the focus that could be increasingly dedicated to student learning and opportunity.

- List of Study Committee Members:
  - Charlie Magill, Williston
  - Chris Kapsalis, Shelburne
  - Colleen MacKinnon, Hinesburg
  - Mary Catherine Jones, Shelburne
  - Russ Caffry, Shelburne
  - Lisa Falcone, Hinesburg
  - Zoe Erdman, Williston
  - Deb Baker-Moody, Williston
  - Rich Lowrey, Charlotte
  - Jeanne Jensen, Williston
  - Wendy Goodrich, St. George
  - Sue Thibault, Charlotte
  - Robert Goudreau, Principal HCS
  - Staffing:

    Elaine Pinckney, Superintendent of Schools
    Robert Mason, CSSU Chief Operations Officer
    Brian O'Regan, St. Michaels College
    George Cormier, School Finance Consultant
    Sandy Raymond, Executive Assistant to the Superintendent

- Appendices
  a. CSSU Governance Study 2008
  b. CSSU Snapshot of Consolidated Services/Programs (November 2007)
  c. Financials
     i. Capital Assets and Long-term Debt
     ii. Budget and Tax Analysis
  d. Research Review of Studies done in addition to those referred to below

- Research Articles
  e. *County School Districts: Research and Policy Considerations; Center for the Study of Education Policy, Illinois State University; April 2009.*
  f. *Consolidation of School Districts: What the research says and what it means; Howley, Johnson and Petrie; Ohio University, February 2011.*
  g. *Merger/consolidation of school districts: Does it save money and improve student achievement? Pennsylvania School Boards Association, April 2009*
  h. *Does School District Consolidation Cut Costs? Duncombe and Yinger, Center for Policy Research, Syracuse University; American Education Finance Association, 2007.*
  i. *Education Resources Information Center (ERIC) - Summary of 1720 research articles with mixed relevance to concept of Regional Education Districts.* http://www.eric.ed.gov/ERICWebPortal/search/simpleSearch.jsp?ERICExtSearch_SearchValue_0=School+consolidation&ERICExtSearch_SearchType_0=kw&eric_sortField=#.TnaAsZzvU6U.mailto

Chittenden South Supervisory Union
Optional School Governance Structures Committee

Summary Report

Respectfully Submitted to Members of the CSSU Full School Board for Continued Dialogue and Application in Public Policy about School Governance

Purposes

One: Stimulate continued dialogue and exploration of governance structures and choices with community involvement

Two: Become prepared for providing formal and informal input and testimony as needed about internal and external public policy initiatives

January 2008

Membership:
Clyde Baldwin, Charlotte School Board
Colleen MacKinnon, Hinesburg School Board
Darlene Worth, Williston School Board
Jed Graef, Shelburne School Board
Jonathan Milne, CVU School Board
Kellie Bosenberg, St. George School Board
Russ Caffry, Shelburne School Board

Supported by: Elaine Pinkney, Superintendent of Schools
Raymond Proulx, Facilitator

Background:

In October 2007 the CSSU School Board authorized a committee of its members to explore optional school governance structures and procedures that would build upon the work accomplished over the past five to six years and to better prepare the Supervisory Union Board members to engage in informed public policy discussion and potential legislation on how Vermont schools are governed, managed, lead and operated. To this end, the Committee met on November 18, November 30, December 10 and December 18, 2007.

The first order of business was to establish a foundation level of understanding about the current status of governance within the CSSU. The Committee established this foundation in the attached document entitled: "Snap Shot of Current State". This document provides vital information necessary for understanding current challenges and successes that have are realized at the present time. It also sets the

stage for exploring options to improve learning opportunities for students, increase efficiencies in leading, managing and operating schools and meeting the demands of the present political, economic, demographic and global realities that define our current culture.

The second foundational work of the Committee was to set guiding principles necessary in guiding this work. These guiding principles are found on pages 1 and 2 of the Report. Highlights among these principles include the need to focus on:

- quality education and learning
- quality leadership
- efficient and effective administration and operations
- capacity for public policy work of school boards
- community and parental partnerships and engagement
- effective communication
- control, power and authority to maximize success
- building capacity to pro-actively meet current realities and future challenges and opportunities

The Committee also prepared itself for this work by obtaining numerous documents, previous studies and current proposals specifically related to the work at hand. Committee members became familiar with key laws and current School organizational structures as outlined in Vermont Statutes. Some information was also gathered and discussed regarding what other Vermont school governance committees found to be advantages and challenges of various structures.

The specific structural options explored included:

1. Status quo (current CSSU structure with seven school boards and central office) but with continuous advancement in finding efficient and effective leadership and management functions and procedures.
2. Current structure accompanied by contracting services with neighboring supervisory unions and/or school districts.
3. Create a Pre-K through Grade 12 Unified Union School District
4. Create an Elementary (Pre-K through Grade 8) Union School District (five elementary school boards to one elementary school board) – CVU retains current status
5. Establish three union school districts: Pre-K through Grade 5; Grades 6 through 8; and, Grades 9 through 12.
6. Create a County-wide Pre-K through Grade 12 Unified Union School District
7. Commissioner Cate's Current School Governance proposal
8. Form a Joint Contract School District for Pre-K through Grade 8

Summary of Findings:

- **Note: Detailed information regarding the Options will be found on pages 2 through 17 in the attached document: "Exploration of Optional Governance Structures for the Advancement of Education".**
- The efforts of school board members, administrators and involved citizens over the past 5 to 8 years in framing new ways for school boards to work, more efficient structures for carrying out central office work, enhancing the role of site-based leaders for instructional leadership and creating mechanisms for greater levels of coordination and collaboration are laudable. Almost everyone perceives that leadership, policy governance, curriculum work and school operations have become more effective and efficient through this work. There are some who feel that the expenditures devoted to implementing this work have reached the top. Additional expenditures may not have the same level of "return on investment".

* Moving from "good to great" requires extraordinary effort. Escalating the

work that has already been accomplished needs to have advanced thinking for how to provide more systemic support, common purpose, bringing together all forces necessary in meeting future challenges and more efficiently providing quality education to every student.

* Therefore, we are including our current governance structure (Option 1) in the mix for discussion recognizing great accomplishments but with the message that there continues to be the need for advancement of this way of doing business. More dialogue and ultimate actions will be needed if we continue with this option.

- Options 2, 3, 5 and 8 from the foregoing list were not considered to be congruent with the "guiding principals" established as filters in this work. These options were deleted for further consideration.

- Options 4,6 and 7 from the previous list are being recommended for careful consideration by the CSSU board members. We are confident that changes and challenges will not only continue by will escalate. For example, energy and health care costs will continue to rise, student enrollments will have implications on programs and facilities and we will need to be on the front edge of new research and technological advancements. In addition, Vermont pubic policy makers are considering significant alterations to the governance structures and procedures for schools. We must have the ability to respond to these challenges. We believe that deeper understanding and exploration of these Options will prepare us for the work at hand.

All three of these Options call for unification of school districts and school boards. Some of the **common benefits** in these Options include:

a. All of our current school districts have similar goals and aspirations for students and learning. Working together has the potential of helping to sustain quality of education in tough economic times and expand educational opportunities. Research, expertise, skills and talents may be more readily accessed and shared in a consolidated environment.
b. Students from all communities may have greater access to desired learning environments, program offerings and choice without the usual regulatory encumbrances.
c. Communications for all communities and across all schools have the potential for becoming consistent and streamlined. There should be less confusion about communications and enhanced understanding about accountability reports.
d. Transitions for students and families moving from school to school have the potential for becoming simplified.
e. There will be fewer school boards and many fewer meetings under all three of these options. There is the potential for greater balance in board member and administrator obligations. In addition, there is the potential for school sites to enable more community focus on education and learning.

The **challenges** that surface in each of these Options are also quite common:

f. Ready access by community members and parents to school board members and school boards may be made more difficult.
g. The definition of community school will undergo a cultural shift. All of the schools will become essence of a single school community.
h. Transitioning from the current governance structure to an alternative one will take time, effort and financial resources.
i. The real or perceived loss of local control will need to be explored and addressed.

j. Relatively small units of governance will be made much larger. While larger may have economies of scale and lead to greater efficiencies there may be concern that big will lead to new and unforeseen challenges that will be counter productive.
k. There will be the need for creative ways and means for involving community members in school decision making.

Conclusion:

We have a deeper understanding of the complexities that surround public policy agendas dealing with governance of school district. We understand the long and successful traditions and practices that have served education in Vermont and in the CSSU quite well. At the same time, we have a deeper conviction that the current culture, climate, external forces and general economic and demographic conditions immediately around us and in the world do and will continue to profoundly impact on how we conduct the business of educating our children and youth. We are confident that change in how we structure education in Vermont is eminent. We must be prepared to influence the direction of this change in ways that best serve our students and communities. Please read our report carefully and engage in extended dialogue and action as we move forward.

Thank you.
Your CSSU Optional Governance Committee Members

Appendix D
Committee Meetings and Activities

At the April 2015 CSSU Board meeting, a subcommittee of the CSSU Board was charged to review the Act 46 legislation for CSSU relevancy and to develop a recommendation for the full CSSU board. The subcommittee met three times (May 5, July 8, and August 19, 2017). At the September 15, 2015 regular board meetings, the subcommittee recommended to the boards of the CSSU for each local board to take action to join an Act 46 Study Committee of the SU. Meetings of the CSSU Act 46 Study Committee commenced September 28, 2015.

All CSSU Act 46 Study Committee meetings have been held in compliance with open meeting laws. Full study committee meetings were broadcast via web-conferencing and meeting agendas, minutes, and supporting materials are available at http://act46.cssu.org/home.

Regular Committee Meetings

September 28, 2015 (5:30-7:30 p.m.), CSSU Conference Room – overview, organization
October 12, 2015 (5:30-7:30 p.m.), CSSU Conference Room
October 26, 2015 (5:30-7:30 p.m.), CSSU Conf. Room
November 2, 2015 (5:30-7:30 p.m.), CSSU Conf. Room
November 9, 2015 (5:30-7:30 p.m.), Williston Central School
November 16, 2015 (5:30-7:30), CSSU Conf. Room
December 8, 2015 (5:30-7:30), CSSU Conf. Room
January 7, 2016 – Review articles of agreement, financial tables, transition planning
January 19, 2016 – CVU, Rm 160, Local board review and comment on draft report
January 25, 2016 (5:30-7:30 p.m.), CSSU, review comments from local boards
February 9, 2016 (5:30-7:30 p.m.), CSSU Conf. Room
March 8, 2016 (5:30-7:30 p.m.), CSSU Conf. Room
March 29, 2016 (5:30-7:30 p.m.), CSSU Conf. Room - Committee approves report

Scheduled Full Study Committee Meetings: 4/12, 4/27, 5/10, 5/31

Subcommittee Meetings

Communications: 10/07/15, 10/14/15, 10/21/15, 10/28/15, 12/02/15, 12/09/15, 2/3/16, 3/9/16, 3/30/16
Governance: 10/19/15, 11/04/15, 11/11/15, 12/16/15
Financials: 11/06/15,11/20/15, 12/04/15

Introductory Public Forums (others TBD)

November 10, 2015 - Shelburne
November 12, 2015 – Williston
November 18, 2015 – St. George
November 30, 2015 - Hinesburg
December 2, 2015 – Charlotte
April 12, 2016 – "Act 46 Night at CVU" – Public forum/ all communities

Appendix E
Tax Implications

The tax rate model provided by the District Management Council and made available for the Act 46 Implementation Project illustrates the blended tax rate of merged districts versus the tax rates for non-merged districts in CSSU. Tax rates are influenced by many factors such as Common Level of Appraisal (CLA) and statewide tax rates but for purposes of illustrating differences between merged and non-merged rates, the study committee adopted one set of assumptions. Due to the limitations of the DMC model, a single percent growth rate in student count (-1% based on the latest New England School Development Council forecast) and a single percent growth rate in education spending (+2% based on historical budgets) are applied uniformly across all towns.

The DMC model takes into account both the impact of the blended tax rate and the transition tax incentives. The tax benefit to those larger districts, which currently have costs per equalized pupil below the SU average, is less than those above the average but all districts would benefit over the five-year period.

The DMC model uses actual data from the 2015-2016 budget year, which does not include Shelburne's recently passed $9.2 million bond and a roughly $13.5 million bond being discussed in Williston. Including that spending would increase the difference between the merged and non-merged tax rates for those two towns and temper the difference for the other three towns.

To demonstrate the impact of Shelburne's bond and a potential bond for capital investments in Williston, a second tax rate table is presented. This second table uses the following approach:

a. To show the "do nothing tax rates", with no consolidation, the 2% spending model outputs were adjusted to show bonding costs (i.e., Shelburne is adjusted up 6.49 cents years 2018 and out for the $9.25M bond; and Williston is adjusted up 6.57 cents years 2018 and out for the $13.5M bond).

b. To demonstrate the "consolidated tax rates", the model was adjusted to show consolidated tax rates that include both the Shelburne and a potential Williston bond (i.e., all districts are adjusted up 4.42 cents for the inclusion of a $22.75 Bond at CSSU-SD)

Note: The cent increases were tabulated by taking the tax rate change resulting from inclusion of the first year out Principal and Interest payments in the net cost of education.

		Act 46 Tax Rate Model			
		+2% spending , -1% EP			
		non merger	merger eq tax		
		Eq tax rate	rate w/ incentive	difference	cum
Charlotte					
	FY18	$1.69	$1.49	($0.20)	($0.20)
	FY19	$1.74	$1.56	($0.18)	($0.38)
	FY20	$1.79	$1.63	($0.16)	($0.55)
	FY21	$1.82	$1.70	($0.12)	($0.67)
	FY22	$1.90	$1.77	($0.13)	($0.80)
Hinesburg					
	FY18	$1.60	$1.49	($0.11)	($0.11)
	FY19	$1.65	$1.56	($0.09)	($0.20)
	FY20	$1.70	$1.63	($0.07)	($0.27)
	FY21	$1.75	$1.70	($0.05)	($0.32)
	FY22	$1.80	$1.77	($0.03)	($0.35)
Shelburne					
	FY18	$1.56	$1.49	($0.07)	($0.07)
	FY19	$1.61	$1.56	($0.05)	($0.12)
	FY20	$1.66	$1.63	($0.03)	($0.15)
	FY21	$1.71	$1.70	($0.01)	($0.15)
	FY22	$1.76	$1.77	$0.01	($0.14)
Williston					
	FY18	$1.55	$1.49	($0.06)	($0.06)
	FY19	$1.59	$1.56	($0.04)	($0.09)
	FY20	$1.64	$1.63	($0.01)	($0.11)
	FY21	$1.69	$1.70	$0.01	($0.10)
	FY22	$1.74	$1.77	$0.03	($0.07)
St George					
	FY18	$1.84	$1.49	($0.35)	($0.35)
	FY19	$1.93	$1.56	($0.37)	($0.72)
	FY20	$2.03	$1.63	($0.40)	($1.12)
	FY21	$2.13	$1.70	($0.43)	($1.55)
	FY22	$2.23	$1.77	($0.46)	($2.01)

Act 46 Tax Rate Model
-1% EP per year, +2% spending
plus $22.75M anticipated capital maintenance

	w/o consolidation Eq tax rate	with consolidation rate w/ incentive	difference	cum
Charlotte				
FY18	$1.69	$1.54	($0.15)	($0.15)
FY19	$1.74	$1.60	($0.14)	($0.29)
FY20	$1.79	$1.67	($0.12)	($0.41)
FY21	$1.82	$1.74	($0.08)	($0.49)
FY22	$1.90	$1.82	($0.09)	($0.58)
Hinesburg				
FY18	$1.60	$1.54	($0.06)	($0.06)
FY19	$1.65	$1.60	($0.04)	($0.11)
FY20	$1.70	$1.67	($0.02)	($0.13)
FY21	$1.75	$1.74	($0.00)	($0.14)
FY22	$1.80	$1.82	$0.02	($0.12)
Shelburne at $9.25M bond				
FY18	$1.63	$1.54	($0.09)	($0.09)
FY19	$1.67	$1.60	($0.07)	($0.16)
FY20	$1.72	$1.67	($0.05)	($0.21)
FY21	$1.77	$1.74	($0.03)	($0.23)
FY22	$1.82	$1.82	($0.01)	($0.24)
Williston at $13.5M bond assumed				
FY18	$1.61	$1.54	($0.08)	($0.08)
FY19	$1.66	$1.60	($0.06)	($0.13)
FY20	$1.71	$1.67	($0.04)	($0.17)
FY21	$1.76	$1.74	($0.01)	($0.18)
FY22	$1.81	$1.82	$0.01	($0.18)
St George				
FY18	$1.84	$1.54	($0.30)	($0.30)
FY19	$1.93	$1.60	($0.33)	($0.63)
FY20	$2.03	$1.67	($0.35)	($0.99)
FY21	$2.13	$1.74	($0.38)	($1.37)
FY22	$2.23	$1.82	($0.41)	($1.78)

Deferred Capital Maintenance Sensitivity Case

Base tax rate model adjusted for Shelburne 2015 approved bond and potential Williston (2016 or 2017) bond. Equalized tax rate without consolidation adjusted by: Shelburne + $0.065, Williston + $0.066

Rate with consolidation incentive increased for all towns by $0.044

Appendix F
Tax Rate Details by Town

Assuming Districts Merge With All Other Districts Within the Same SU

Output by Town

Do nothing model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Charlotte	Homestead tax rate	1.5913	1.6395	1.6892	1.7404	1.7931	1.8237	1.9046
Charlotte	Tax $ (based on town homestead EGL)	$ 9,615,354	$ 9,906,600	$ 10,206,910	$ 10,516,283	$ 10,834,721	$ 11,019,620	$ 11,508,454
$ 100,000	Tax $ (based on selected homestead value)	$ 1,591	$ 1,640	$ 1,689	$ 1,740	$ 1,793	$ 1,824	$ 1,905

5 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Charlotte	Homestead tax rate	1.5913	1.6395	1.4905	1.5586	1.6283	1.6995	1.7722
Charlotte	Tax $ (based on town homestead EGL)	$ 9,615,354	$ 9,906,600	$ 9,006,275	$ 9,417,766	$ 9,838,924	$ 10,269,147	$ 10,708,433
Charlotte	Tax $ savings due to merger	$ -	$ -	$ 1,200,635	$ 1,098,518	$ 995,796	$ 750,473	$ 800,021
$ 100,000	Tax $ (based on selected homestead value)	$ 1,591	$ 1,640	$ 1,491	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ 199	$ 182	$ 165	$ 124	$ 132

4 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Charlotte	Homestead tax rate	1.5913	1.6395	1.6892	1.6047	1.6283	1.6995	1.7722
Charlotte	Tax $ (based on town homestead EGL)	$ 9,615,354	$ 9,906,600	$ 10,206,910	$ 9,696,564	$ 9,838,924	$ 10,269,147	$ 10,708,433
Charlotte	Tax $ savings due to merger	$ -	$ -	$ -	$ 819,719	$ 995,796	$ 750,473	$ 800,021
$ 100,000	Tax $ (based on selected homestead value)	$ 1,591	$ 1,640	$ 1,689	$ 1,605	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ -	$ 136	$ 165	$ 124	$ 132

Output by SU

Do nothing model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate							

5 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.4905	1.5586	1.6283	1.6995	1.7722

4 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.5905	1.5586	1.6283	1.6995	1.7722

Assuming Districts Merge With All Other Districts Within the Same SU

Output by Town

Do nothing model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Shelburne	Homestead tax rate	1.4698	1.5143	1.5602	1.6075	1.6562	1.7064	1.758
Shelburne	Tax $ (based on town homestead EGL)	$ 12,824,870	$ 13,213,159	$ 13,613,663	$ 14,026,383	$ 14,451,320	$ 14,889,344	$ 15,339,584
$ 100,000	Tax $ (based on selected homestead value)	$ 1,470	$ 1,514	$ 1,560	$ 1,608	$ 1,656	$ 1,706	$ 1,758

5 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Shelburne	Homestead tax rate	1.4698	1.5143	1.4905	1.5586	1.6283	1.6995	1.7722
Shelburne	Tax $ (based on town homestead EGL)	$ 12,824,870	$ 13,213,159	$ 13,005,490	$ 13,599,702	$ 14,207,876	$ 14,829,137	$ 15,463,488
Shelburne	Tax $ savings due to merger	$ -	$ -	$ 608,174	$ 426,681	$ 243,444	$ 60,207	$ (123,903)
$ 100,000	Tax $ (based on selected homestead value)	$ 1,470	$ 1,514	$ 1,491	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ 70	$ 49	$ 28	$ 7	$ (14)

4 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Shelburne	Homestead tax rate	1.4698	1.5143	1.5602	1.5586	1.6283	1.6995	1.7722
Shelburne	Tax $ (based on town homestead EGL)	$ 12,824,870	$ 13,213,159	$ 13,613,663	$ 13,599,702	$ 14,207,876	$ 14,829,137	$ 15,463,488
Shelburne	Tax $ savings due to merger	$ -	$ -	$ -	$ 426,681	$ 243,444	$ 60,207	$ (123,903)
$ 100,000	Tax $ (based on selected homestead value)	$ 1,470	$ 1,514	$ 1,560	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ -	$ 49	$ 28	$ 7	$ (14)

Output by SU

Do nothing model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate							

5 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.4905	1.5586	1.6283	1.6995	1.7722

4 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.5905	1.5586	1.6283	1.6995	1.7722

Assuming Districts Merge With All Other Districts Within the Same SU

Output by Town

Do nothing model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
St. George	Homestead tax rate	1.7263	1.7786	1.839	1.9318	2.0277	2.127	2.2297
St. George	Tax $ (based on town homestead EGL)	$ 853,818	$ 879,685	$ 909,558	$ 955,457	$ 1,002,888	$ 1,052,001	$ 1,102,796
$ 100,000	Tax $ (based on selected homestead value)	$ 1,726	$ 1,779	$ 1,839	$ 1,932	$ 2,028	$ 2,127	$ 2,230

5 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
St. George	Homestead tax rate	1.7263	1.7786	1.4905	1.5586	1.6283	1.6995	1.7722
St. George	Tax $ (based on town homestead EGL)	$ 853,818	$ 879,685	$ 737,192	$ 770,874	$ 805,347	$ 840,563	$ 876,519
St. George	Tax $ savings due to merger	$ -	$ -	$ 172,366	$ 184,582	$ 197,541	$ 211,439	$ 226,277
$ 100,000	Tax $ (based on selected homestead value)	$ 1,726	$ 1,779	$ 1,491	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ 349	$ 373	$ 399	$ 428	$ 458

4 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
St. George	Homestead tax rate	1.7263	1.7786	1.8390	1.7471	1.6597	1.6995	1.7722
St. George	Tax $ (based on town homestead EGL)	$ 853,818	$ 879,685	$ 909,558	$ 864,080	$ 820,876	$ 840,563	$ 876,519
St. George	Tax $ savings due to merger	$ -	$ -	$ -	$ 91,376	$ 182,012	$ 211,439	$ 226,277
$ 100,000	Tax $ (based on selected homestead value)	$ 1,726	$ 1,779	$ 1,839	$ 1,747	$ 1,660	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ -	$ 185	$ 368	$ 428	$ 458

Output by SU

Do nothing model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate							

5 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.4905	1.5586	1.6283	1.6995	1.7722

4 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.5905	1.5586	1.6283	1.6995	1.7722

Assuming Districts Merge With All Other Districts Within the Same SU

Output by Town

Do nothing model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Hinesburg	Homestead tax rate	1.5067	1.5524	1.5994	1.6479	1.6978	1.7493	1.8023
Hinesburg	Tax $ (based on town homestead EGL)	$ 5,530,734	$ 5,698,488	$ 5,871,014	$ 6,049,046	$ 6,232,217	$ 6,421,261	$ 6,615,811
$ 100,000	Tax $ (based on selected homestead value)	$ 1,507	$ 1,552	$ 1,599	$ 1,648	$ 1,698	$ 1,749	$ 1,802

5 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Hinesburg	Homestead tax rate	1.5067	1.5524	1.4905	1.5586	1.6283	1.6995	1.7722
Hinesburg	Tax $ (based on town homestead EGL)	$ 5,530,734	$ 5,698,488	$ 5,471,268	$ 5,721,247	$ 5,977,099	$ 6,238,457	$ 6,505,321
Hinesburg	Tax $ savings due to merger	$ -	$ -	$ 399,746	$ 327,799	$ 255,118	$ 182,804	$ 110,490
$ 100,000	Tax $ (based on selected homestead value)	$ 1,507	$ 1,552	$ 1,491	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ 109	$ 89	$ 70	$ 50	$ 30

4 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Hinesburg	Homestead tax rate	1.5067	1.5524	1.5994	1.5586	1.6283	1.6995	1.7722
Hinesburg	Tax $ (based on town homestead EGL)	$ 5,530,734	$ 5,698,488	$ 5,871,014	$ 5,721,247	$ 5,977,099	$ 6,238,457	$ 6,505,321
Hinesburg	Tax $ savings due to merger	$ -	$ -	$ -	$ 327,799	$ 255,118	$ 182,804	$ 110,490
$ 100,000	Tax $ (based on selected homestead value)	$ 1,507	$ 1,552	$ 1,599	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ -	$ 89	$ 70	$ 50	$ 30

Output by SU

Do nothing model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate							

5 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.4905	1.5586	1.6283	1.6995	1.7722

4 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.5905	1.5586	1.6283	1.6995	1.7722

Assuming Districts Merge With All Other Districts Within the Same SU

Output by Town

Do nothing model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Williston	Homestead tax rate	1.458	1.5022	1.5477	1.5946	1.6429	1.6927	1.744
Williston	Tax $ (based on town homestead EGL)	$ 12,503,873	$ 12,882,934	$ 13,273,145	$ 13,675,361	$ 14,089,584	$ 14,516,671	$ 14,956,622
$ 100,000	Tax $ (based on selected homestead value)	$ 1,458	$ 1,502	$ 1,548	$ 1,595	$ 1,643	$ 1,693	$ 1,744

5 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Williston	Homestead tax rate	1.4580	1.5022	1.4905	1.5586	1.6283	1.6995	1.7722
Williston	Tax $ (based on town homestead EGL)	$ 12,503,873	$ 12,882,934	$ 12,782,595	$ 13,366,623	$ 13,964,374	$ 14,574,988	$ 15,198,467
Williston	Tax $ savings due to merger	$ -	$ -	$ 490,550	$ 308,738	$ 125,210	$ (58,317)	$ (241,844)
$ 100,000	Tax $ (based on selected homestead value)	$ 1,458	$ 1,502	$ 1,491	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ 57	$ 36	$ 15	$ (7)	$ (28)

4 year model

Name of Town		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Williston	Homestead tax rate	1.4580	1.5022	1.5477	1.5586	1.6283	1.6995	1.7722
Williston	Tax $ (based on town homestead EGL)	$ 12,503,873	$ 12,882,934	$ 13,273,145	$ 13,366,623	$ 13,964,374	$ 14,574,988	$ 15,198,467
Williston	Tax $ savings due to merger	$ -	$ -	$ -	$ 308,738	$ 125,210	$ (58,317)	$ (241,844)
$ 100,000	Tax $ (based on selected homestead value)	$ 1,458	$ 1,502	$ 1,548	$ 1,559	$ 1,628	$ 1,700	$ 1,772
	Tax $ savings due to merger	$ -	$ -	$ -	$ 36	$ 15	$ (7)	$ (28)

Output by SU

Do nothing model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate							

5 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.4905	1.5586	1.6283	1.6995	1.7722

4 year model

Name of SU		Year						
		FY 2016	FY 2017	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
Chittenden South S.U.	Homestead tax rate	1.4983	1.5437	1.5905	1.5586	1.6283	1.6995	1.7722

Appendix G
Assets and Liabilities Assessment

A comparison of the audited assets and liabilities for the four operating districts shows the impact to the smaller towns as their assets are diluted over a larger, consolidated student count. Assets are equal to the depreciated value of the building and equipment and are of questionable relevance as this study contains no recommendation to close or sell schools.

	Per FY15 Audit			Net Asset and Liabilities		
	ADM	Net Capital Assets	Debt Service Principal	Stand Alone	Consolidated	Difference
Charlotte	445.06	5,854,179.00	2,283,159.00	3,571,020.00	3,038,090.87	(532,929.13)
Hinesburg	587.30	7,281,784.00	2,369,000.00	4,912,784.00	4,009,056.68	(903,727.32)
Shelburne	853.23	14,542,148.00	9,671,449.00	4,870,699.00	5,824,361.37	953,662.37
Williston	1,052.19	8,027,611.00	1,328,093.00	6,699,518.00	7,182,512.09	482,994.09
Total	2,937.78	35,705,722.00	15,651,701.00	20,054,021.00	20,054,021.00	0.00

A view of liabilities, including an estimate of deferred maintenance, for the four operating districts points to a future dilution of tax benefit to Hinesburg and improvement to the tax rate model for Williston. Neither impact is significant when spread over a ten to 20 year bond payment schedule. Deferred maintenance numbers are estimates only.

	Per FY15 Audit			Total Liabilities		
	ADM	Debt Service Principal	Deferred Maintenance	Stand Alone	Consolidated	Difference
Charlotte	445.06	2,283,159.00	3,600,000.00	5,883,159.00	5,463,331.40	(419,827.60)
Hinesburg	587.30	2,369,000.00	2,728,000.00	5,097,000.00	7,209,397.67	2,112,397.67
Shelburne	853.23	9,671,449.00	620,000.00	10,291,449.00	10,473,819.81	182,370.81
Williston	1,052.19	1,328,093.00	13,463,000.00	14,791,093.00	12,916,152.12	(1,874,940.88)
Total	2,937.78	15,651,701.00	20,411,000.00	36,062,701.00	36,062,701.00	0.00

Notes:

1. Charlotte - $ does not include ’39 building, may mothball, Dore and Whittier Fall 2013 updates
2. Hinesburg $$, White Building, 52 wing, 56 wing
3. Shelburne – with completion of $9.2M renovation, focus is on items in A, C, & D wings
4. Williston – nominal def. maintenance, with ABS, and Priority 1 & 2 only for WCS, TruexCullins 12/2015 discounted

Appendix H
Budget Development Process Recommendations

One of the tasks charged to the financial subcommittee of the Act 46 Study Committee was the development of a proposed framework within which future budgets would be developed. Specifically the guiding question was:

> *How will a consolidated board's budget development process continue to support excellence in the delivery of education while ensuring equity between schools and proving a good value to taxpayers?*

With the understanding that a new budget process must evolve rather than change all at once, the following is offered to illustrate the study committee's discussion on this subject.

There are five key components to be addressed on the question of budget development:

- Baseline budget development
- Local voice in budget discussions
- Budget challenges and reductions
- Innovation
- Local initiatives

Baseline budget development

A consolidated budget should be developed based as much as possible on data-driven best practices and State Education Quality Standards. In addition, the board should consider creating standing committees to focus on: physical assets (buildings, grounds, and vehicles), curriculum, and wellness. These committees should annually make budget recommendations in those areas. With this framework budget development would be based on a common understanding and a common set of priorities and goals at the board level. This should drive both equity and excellence at the school building level.

The board should also assess recognized price indices, current negotiated agreements, and local economic realities to set a target budget number for a consolidated district. This target must match reasonably with the goals and priorities identified above.

Board goals and priorities should be used by local school principals to develop the details of their budgets. Principals would be encouraged to include community members in the process (see local voice). The superintendent would have the responsibility to review local budgets for adherence to board goals and to ensure equity.

Baseline Budget Development

Budget Area	Budget Approach
Special Education*	Service Plan development and review by Director of Student Services and aligned with best practices
Regular Ed*	Targeted class size ranges for each grade level based on Education Quality Standards
Library, health, guidance staffing and spending	Based on state Education Quality Standards
Number and structure of administration and clerical staff	Recommendation of the Superintendent
Curricular Offerings: fine arts, practical arts, athletics, clubs	Standing committee to oversee curriculum and recommended breadth of offerings.
Curricular Offerings: high school electives	
Transportation	Standing Committee tasked with the maintenance and operations of district physical assets
Operations and maintenance	
IT	State Education quality standards
Food Service, SAPs and Mentoring, wellness curriculum	Standing committee focused on student wellness

*Does not address salary and benefits, which would continue to be managed through negotiated agreement

Local voice in budget discussions
In order to ensure local engagement with the budget, the following actions are recommended.

1. School budget forums should be held in each town early in the budget process to review and influence board goals and priorities.
2. School principals should be encouraged to involve community members in the development of their budget as appropriate to the community.
3. One budget buddy per town should be recruited to "sit at the table" during budget development work at the SD.

Budget challenges and reductions
Local administrators have the best information to develop options to reduce costs if on the first pass the budget comes in too high. However, in order to avoid inequity between schools, the leadership team should work together to present to the board a single recommended plan.

Innovation
Piloting innovative local ideas often requires funding. In place of local boards approving funds through the current budget process, a new process could include an "Innovation Fund" as a source for funding creative and innovative programs.

Local Initiatives
There may be local initiatives that do not translate across all schools but should be supported in the budget as part of community connections. These cost allocations should not adversely affect educational equity.

Appendix I - School District Data

from 2016 Annual Report

CSSU DEMOGRAPHICS

Town Population Over Time					
	2000	**2005**	**2010**	**Change from 2000**	
Charlotte	3569	3654	3754	185	5%
Hinesburg	4340	4433	4396	56	1%
Shelburne	6944	7007	7144	200	3%
St. George	698	689	674	-24	-3%
Williston	7650	8262	8698	1048	12%
Total Pop.	23,201	24,405	24,666	1465	6%
Source: factfinder.census.gov					

School Year	*Student Enrollment As of Dec. 1 (see chart below)*	*Number of CSSU Students Eligible for Free & Reduced Lunch*	*Number of CSSU Students who are English Language Learners*
2005-06	4376	354	78
2006-07	4325	359	79
2007-08	4276	384	86
2008-09	4250	382	99
2009-10	4220	464	100
2010-11	4204	462	114
2011-12	4164	603	107
2012-13	4110	608	96
2013-14	4062	601	118
2014-15	4064	556	109
2015-16	3941	597	111

Socioeconomic Status:

2013 Median household income per family:
CSSU = $94,850 Vermont = $60,913

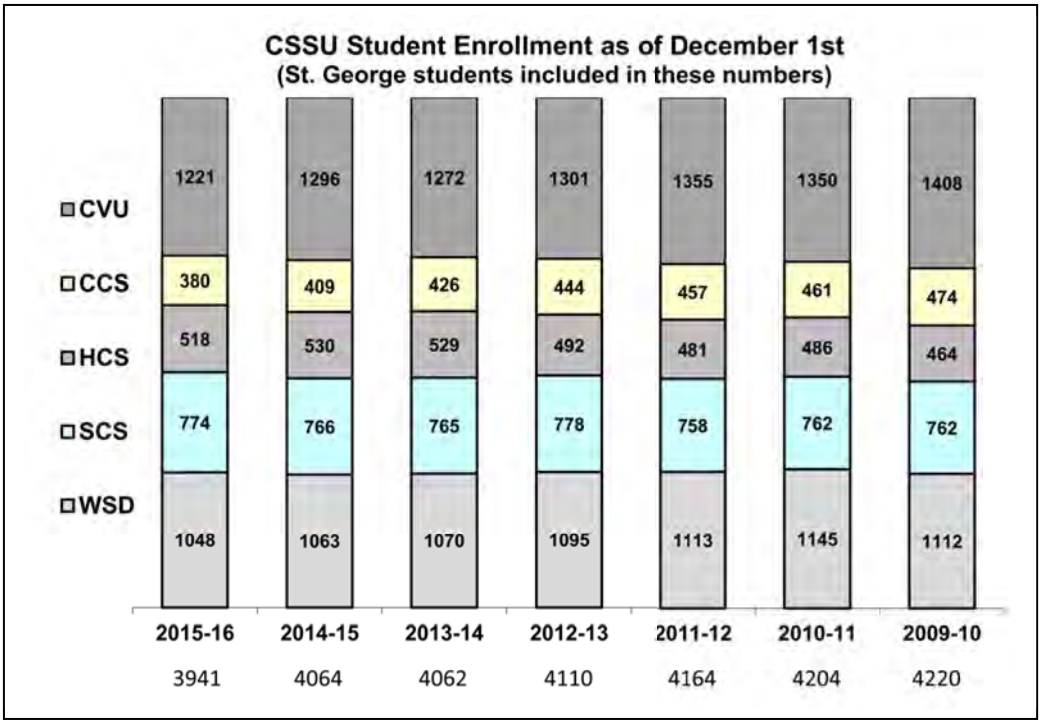
Source: http://www.tax.vermont.gov

Student Average Daily Attendance:

CSSU's strong attendance rate averages 95-96% annually.

Ethnic Groups:

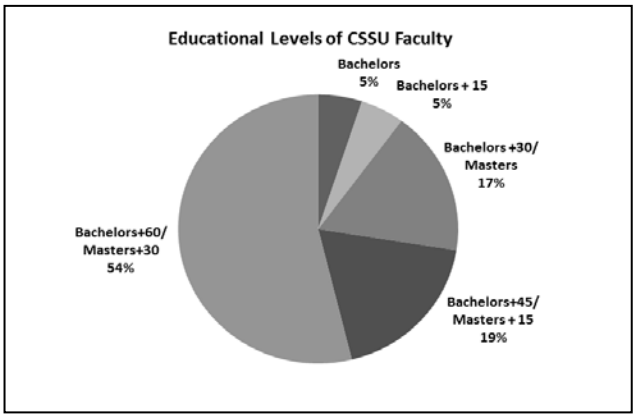
91% of CSSU students identify themselves as white/Caucasian, 9% as African-American, Asian, or Hispanic.

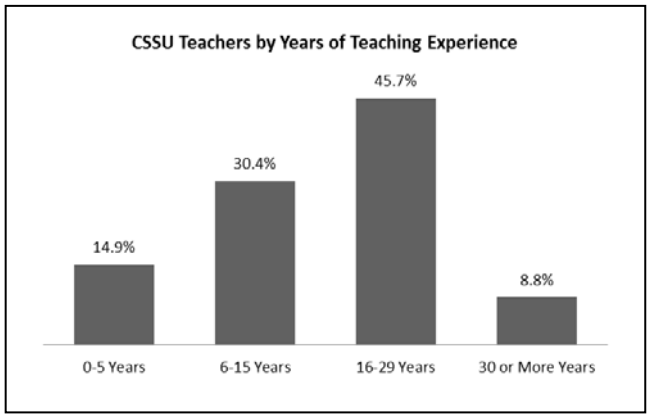


FACULTY AND STAFF

Professional Staff:

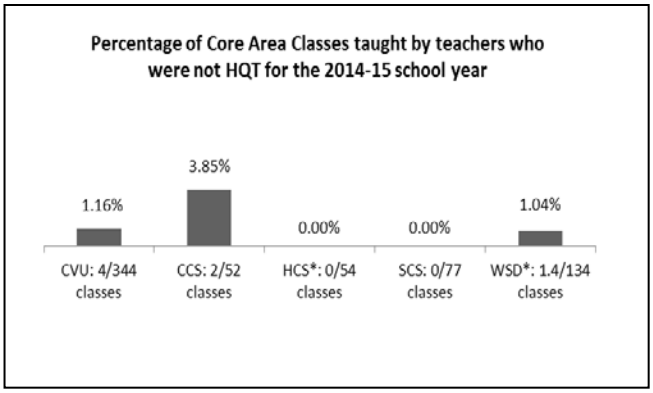
Chittenden South Supervisory Union currently employs over 400 professional staff members. Half of all CSSU teachers are at B60/M30 level and the majority holds advanced degrees such as Masters, a Masters with additional credits or a Doctorate.





Professional Qualifications and HQT:

The 2001 Federal No Child Left Behind Act (NCLBA) requires that all public school teachers of "core academic subjects" meet the Highly Qualified Teacher (HQT) requirements of the law. The core areas are: English/Language Arts (including English as a Second Language), Mathematics, Science, Social Studies, Reading, Foreign Languages, Art, Music, and the general endorsement areas of Elementary and Early Childhood Education. Local Education Agencies are required to report the percentage and number of classes in each school that are taught by teachers who have not yet met HQT requirements for their teaching assignment. The chart shows the percentages for each school (* indicates Title I schools). The overall percentage of classes taught by non-HQT teachers across all schools of the supervisory union in 2014-15 was 1.21%. There are nine teachers across CSSU teaching with provisional licenses (2.2%). Parents may request information regarding the professional qualifications of their child's teacher by contacting the school.



Class Size:

CSSU strives to comply with the Vermont Education Quality Standards (EQS) adopted in April 2014 by working to keep class sizes within state prescribed numbers: "Classes in grades K-3, when taken together, shall average fewer than 20 students per teacher. In grades 4-12, when taken together, classes shall average fewer than 25 students per teacher. The total class roll of a teacher shall not average more than 100 students, except where the specific nature of the teacher's assignment (such as in certain art, music or physical education programs) is plainly adaptable to the teaching of greater numbers of students while meeting the educational goals of the program."

SALARY SCHEDULE

2015-2016

Step	YOE at Hire	B		B15		M/B30		M15/B45		M30/B60	
1	0-5	1.000	41,920	1.060	44,435	1.120	46,950	1.180	49,466	1.240	51,981
2	6	1.050	44,016	1.110	46,531	1.170	49,046	1.230	51,562	1.290	54,077
3	7	1.100	46,112	1.160	48,627	1.220	51,142	1.280	53,658	1.340	56,173
4	8	1.150	48,208	1.210	50,723	1.270	53,238	1.330	55,754	1.390	58,269
5	9	1.200	50,304	1.260	52,819	1.320	55,334	1.380	57,850	1.440	60,365
6	10	1.250	52,400	1.310	54,915	1.370	57,430	1.430	59,946	1.490	62,461
7	11	1.300	54,496	1.360	57,011	1.420	59,526	1.480	62,042	1.540	64,557
8	12	1.350	56,592	1.410	59,107	1.470	61,622	1.530	64,138	1.590	66,653
9	13	1.400	58,688	1.460	61,203	1.520	63,718	1.580	66,234	1.640	68,749
10	14	1.458	61,119	1.518	63,635	1.580	66,234	1.640	68,749	1.700	71,264
11	15					1.640	68,749	1.700	71,264	1.760	73,779
12	16					1.700	71,264	1.760	73,779	1.820	76,294
13	17					1.768	74,115	1.820	76,294	1.880	78,810
14	18							1.888	79,145	1.940	81,325
15	19									2.008	84,175
	16g		Grandfathered Ghost					2.068			86,691

FACULTY RECOGNITION

Hinesburg Community School art teacher **Katie O'Brien** was named UVM Teacher of the Year.

Gretchen Garvey, elementary teacher at Shelburne Community School, has earned her Certified Mindfulness Instructor certificate with Mindful Schools of Emeryville, CA. She has undergone a minimum of 300 hours of training in a yearlong certification program and has made a significant commitment to the theory and practice of mindfulness in education.

Shelburne Community School's **Christine Hertz** authored "A Mindset for Learning" which was published by Heinemann, a renowned publisher of educational as well as non-educational works. Christine will present at the "Learning and the Brain Conference" in San Francisco in February 2016. She will teach the strand *"A Mindset for Learning: Teaching the Traits for Student Growth"* as part of the Shaping Student Mindsets: Promoting Academic Attitudes, Persistence and Performance Session.

WCS teacher **Leah Joly**, was one of the first participants in Vita-Learn's Ignite a Maker program. Leah's students worked with Generator of Burlington focusing on e-textiles.

Jessica West, SCS third grade teacher, is one of a handful of Vermont school teachers partnering with Trouts Unlimited hatchery program. Students in her class are nurturing and hatching trout eggs which will be released into a Vermont stream later in the spring.

Transformative Teams recognized by VITA-Learn and VT ASCD as Project IGNITE recipients for 2015: **Bonnie Birdsall**, Education Technology Specialist, **Donna Powers**, Grades 1-2 Teacher, and **John Terko**, Principal – Allen Brook School; **Corinna Hussey**, Math Teacher, **Charlie MacFadyen**, Education Technology Specialist, and **Katherine Riley**, House Director – CVU High School.

Sharon Davison, Allen Brook School Kindergarten teacher, has been honored with the Vermont Angelo J. Dorta Teaching Excellence Award. She has also been selected to be a fellow of America Achieves Teachers and Principals Fellowship. The Fellowship promotes outstanding teachers and principals' ability to impact practice, policy, and the public conversation so that all students have access to world-class schools.

ACCESS Director **Eddie Krasnow** received the Excellence in Education Award for his exemplary work. The award comes with a generous monetary gift which Eddie is donating to ACCESS CVU.

CCS school counselor **Vicki Nelson**, has been featured in ASCA School Counselor Journal and invited to speak at their national conference next summer.

Appendix J
Proportional Representation

Champlain Valley School District

Population citation:

U.S. Census Bureau, 2010 Census of Population and Housing, Population and Housing Unit Counts, CPH-2-47, Vermont. U.S. Government Printing Office, Washington, DC, 2012.

Proposed 11 member board (Charlotte, Hinesburg, Shelburne and Williston). *Percentages are rounded.*

Town	Population	% of 23,992	Board Members	% of Board	Citizens per Member
Charlotte	3,754	16%	2	18%	1,877
Hinesburg	4,396	18%	2	18%	2,198
Shelburne	7,144	30%	3	27%	2,381
Williston	8,698	36%	4	36%	2,175
	23,992	***100%***	***11***	***100%***	***2,181***

Proposed 12 member board (Charlotte, Hinesburg, St. George, Shelburne and Williston).
Percentages are rounded.

Town	Population	% of 24,666	Board Members	% of Board	Citizens per Member
Charlotte	3,754	15%	2	17%	1,877
Hinesburg	4,396	18%	2	17%	2,198
St. George	674	3%	1	8%	674
Shelburne	7,144	29%	3	25%	2,381
Williston	8,698	35%	4	33%	2,175
	24,666	***100%***	***12***	***100%***	***2,056***

Appendix K
Summary Transition Plan

If communities approve a merger prior to July 1, 2016, two sets of governing bodies would operate during a transition year. The existing boards continue with operations until end of business June 30, 2017 and a new board transitions during the same time period.

Time Line	**Functions**	**Current Boards' Responsibilities**	**Unified District Board's Responsibilities**
February 2016	Budget FY17 Public Engagement	Local board authority for local budgets	NA
Town Meeting Day	FY17 Budget Votes	Local budget votes	NA
	Board Elections (six boards)	Local elections, existing boards	NA
	Communications Re: Act 46 Vote	Hosts for Act 46 Information Activities	NA
June 7, 2016 *(If Study Committee sends to SBE, SBE approves)*	Merger Article Votes	Current local boards to warn Special School District Meeting for June 7, 2016	NA
	New Board Election Initial: 2, 3, 4 yr terms, ending March; thereafter 3-yr terms	NA	NA
July 1, 2016	Transition Period Start	Functions related to FY17 Budget	No authority until organizational meeting w/ Secretary of Education
July 1 - September	Planning for 2016-2017 School Year Goals	Aligned w/ FY17 budget and authority	Policy, hiring superintendent, budget planning, etc.
September 2016-January 2017	FY18 Budget Development	Assign budget buddies to consolidated board; Input as structured by consolidated board	FY18 Budget Development
December 2016 – February 2017	Superintendent Evaluation	Input as requested by consolidated board	Authority by statute, FY18 Contract
March 2017 (Town Meeting Day)	(1) FY18 Budget Vote/ Board Elections (3 year terms only)	NA	Informational Functions for Budget FY18
July 1, 2017	Transition Period End	Existing boards dissolved	Fully operational

FY17 = July 1, 2016 to June 30, 2017
FY18 = July 1, 2017 to June 30, 2018