

WHITE RIVER VALLEY SUPERVISORY UNION

Reports of Act 46 Study Committees

**Proposal to Create Three “Side-by-Side”
School Districts:**

White River Unified School District

First Branch Unified School District

Granville-Hancock Unified School District

January 31, 2017

(Finalized)

White River Valley Supervisory Union

461 Waterman Road
Royalton, VT 05608

January 31, 2017

Dear Chairman Morse and Members of the State Board of Education,

On behalf of the White River Valley Supervisory Union and its three Act 46 Study Committees, we are pleased to present to you this report relative to the creation of three unified union school districts.

Our challenge in addressing the goals of Act 46 is immense. We are perhaps the most complex Supervisory Union in Vermont, created effective July 1, 2016, through an order of the State Board. We currently have 10 districts with five distinct operating structures. This report is the culmination of two years of collaborative activity among our districts which has involved the merging of two supervisory unions, creation of a five year strategic plan for the entire supervisory union, and exploration of Act 46 options. This report calls for the creation of three union school districts.

We have worked for the past year on sorting through the various possibilities and seeking common ground to move forward. We have worked through many difficult issues and believe that the three districts proposed can substantially improve education equity, opportunity, and quality, and improve efficiency and sustainability within our region.

This report is not the report proposing an "alternative structure". Rather it moves our supervisory union toward creating the fewest number of districts "practicable". The formal discussion of "alternative structure" will occur later in the process. At this time, we are seeking State Board approval of the creation of three distinct unified union districts which fit into the definition of the "side-by-side" structure described in Act 156. They will continue to operate within the strong structure of the White River Valley Supervisory Union.

Sincerely yours,

Don Shaw, Chair
WRVSU Board

Lisa Floyd, Chair
PK-12 Study Comm.

Kathy Galluzzo, Chair
PK-6/8 Study Comm.

Bruce Hyde, Chair
Non-Op. Study Comm.

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WHITE RIVER VALLEY SUPERVISORY UNION

Report of Three Act 46 Study Committees

INTRODUCTION

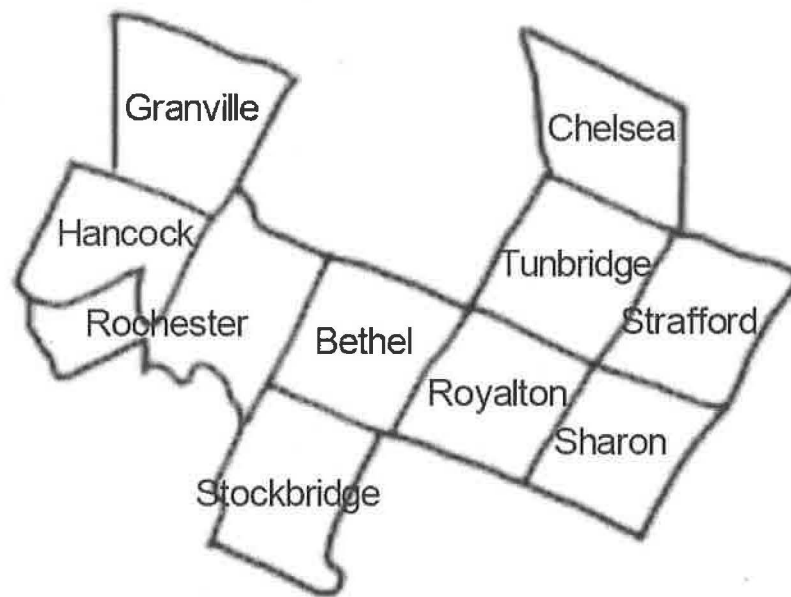
This proposal reflects the work of three separate study committees. It describes a comprehensive approach to achieving the goals of Act 46. The study committees of these districts believe that the proposals included herein will allow for greater educational opportunity for students, will create greater equity across towns, and will address serious issues of inefficiency in a number of towns caused by years of declining enrollment.

Although this report is the product of focused work over the past year, it is the culmination of three years of effort to restructure and strengthen our education system. These ten school districts worked closely with the Agency of Education and the State Board in 2014-2015 to combine two supervisory unions into one, which became effective on July 1, 2016. During 2015-2016, we undertook large-scale strategic planning with the International Center for Education to map a more detailed future direction for education in the region. In the midst of all that work, Act 46 was signed into law and has pushed our communities to consider still further structural changes. Board members and community members serving on study committees have devoted countless hours to this endeavor. This report contains three specific proposals for structural change in the region that allow for significant breakthroughs in education quality and equity, address serious issues of inefficiency, and that can be achieved without substantial change to historic patterns of operating and choice.

WHITE RIVER VALLEY SUPERVISORY UNION CONTEXT

Geography

The White River Valley Supervisory Union is comprised of 10 separate town school districts stretching 42 miles east to west. It is a largely rural area that historically relied on farming, but has evolved into a rich mix of economic endeavors including small business, education (including higher education), medicine, government, and hospitality. The village of South Royalton hosts the Vermont Law School. Vermont Technical College in Randolph and Dartmouth College in Hanover, New Hampshire, are located near the borders of this SU. Although the region is united by the various branches of the White River, residents gravitate to various population centers surrounding it, on the basis of location of residence and work and historical relationships. Many people work, shop, and seek professional services in the Upper Valley, some in the Randolph area, others in Barre-Montpelier, and still others in Rutland. Some on the far west side of the supervisory union gravitate toward Middlebury.



History of Education Delivery

The history of education in this region typifies the situation of many rural areas in Vermont. The small school in each town has long been the center of each community. These communities, in the 1960s, chose not to join the Union High School movement, and instead, decided to maintain their separate town school districts, their patterns of offering tuition to parents, and their small high schools. Those patterns have persisted to this day. Below is a summary of current delivery patterns:

Operation of PK-12 education programs, including small high schools— Bethel, Chelsea, Rochester, Royalton

Operation of PK-8 education program with full choice for grades 9-12—Tunbridge

Operation of PK-8 education program with designation of Thetford Academy for High School—Strafford

Operation of PK-6 education program with full choice for grades 7-12—Sharon and Stockbridge

Non-operating—Granville and Hancock

It should not be surprising that the unification of districts in this region has been very challenging, given the diversity of delivery models and the fact that Act 46 is strong in its protection of traditional patterns of operating schools and paying tuition.

An added dimension of education in the White River Valley involves an independent school, The Sharon Academy, which opened in 1996 and now serves approximately 160 students in grades 7-12. In FY 2016, 108 students from five “choice towns” in this supervisory union were tuitioned to The Sharon Academy.

Demographics

Over the past 20 years, Vermont has lost nearly 20% of its enrollment. That trend has also been experienced in much of the White River Valley, particularly in the most rural school districts. However, when looking at the last five years, the Average Daily Membership (ADM) count has leveled or grown in a number of towns. Some continue to see a loss of students and the attendant increase in cost per student. Others are remaining steady. Still others are experiencing growth. The relatively small number of students in most districts can result in substantial percentage fluctuations in ADM counts from year to year.

Below is a table showing the Average Daily Membership counts over the past five years:

ADM Counts Used in Calculating Equalized Pupils					
	FY2013	FY2014	FY2015	FY2016	FY2017
Bethel	266.41	269.77	288.03	286.03	275.49
Chelsea	136.26	146.73	165.87	170.30	177.00
Granville	32.06	22.00	23.00	28.80	36.00
Hancock	36.04	37.50	47.05	45.00	54.35
Rochester	99.00	100.74	105.80	111.00	95.40
Royalton	321.76	303.29	313.00	332.25	349.85
Sharon	220.85	250.45	256.83	260.50	261.90
Stockbridge	96.70	96.00	101.00	103.00	90.70
Strafford	169.75	177.20	171.25	184.80	176.60
Tunbridge	176.15	181.13	183.00	171.13	173.00
Totals	1,554.98	1584.81	1654.83	1692.81	1690.29

Source: AOE Data Set 10/19/16

The economic well-being of citizens across the region varies. The best available measure of economic status comes from the rate of eligibility for Free and Reduced Price School Meals. With one exception, the towns of the White River Valley Supervisory Union have rates that exceed the statewide average. N/A's indicate that the total number of students is too small to legally report a percentage.

Eligibility for Free and Reduced Price School Meals FY 2016

Bethel	51%	Royalton	48%
Chelsea	51%	Sharon	50%
Granville	N/A	Stockbridge	46%
Hancock	N/A	Strafford	40%
Rochester	54%	Tunbridge	53%

Statewide Average 44%

Planning Prior to Act 46

Supervisory Unions Merger

Historically, the school districts of this region had been assigned by the State Board of Education to two different supervisory unions—the Orange-Windsor Supervisory Union and the Windsor Northwest Supervisory Union. In 2014, at the prompting of the State Board of Education, those two groups came together and conducted a process to merge into a single supervisory union, both to find operating efficiencies, but also to create a foundation from which to create a world-class education program for students.

The ten involved towns came together and created a vision for the new supervisory union as follows:

We envision an education system in the White River Valley where students are engaged in vibrant educational experiences that prepare them for college, career, and life in a democratic society. From experiences within and beyond the walls of our school buildings, students emerge from our education system with academic proficiencies and transferable skills, including clear and effective communication, self-direction, creative and practical problem-solving, responsible and involved citizenship, and informed and integrated thinking. The cost of education is sustainable and strongly supported by our communities. Families seek to reside in the region both because of our strong, healthy communities and our exceptional education system.

Further, the defining document made clear that *the creation of the new supervisory union is not simply about merging business functions or the changing of boundaries; rather it is building a foundational structure that will:*

- *Allow for the creation of an exceptional education experience for all children in the White River Valley.*
- *Ensure strong leadership to support the education program throughout the region.*
- *Achieve immediate efficiencies and create the potential for greater cost-effectiveness over time.*

The full report produced through that process is attached to this report as **Appendix A** and outlines organizational values, mission, and desired results.

The State Board approved the merger of the two SUs in January, 2015, and it became a reality on July 1, 2016.

Development of a 5-year Strategic Plan

Soon after the State Board order, the WRVSU moved into an in-depth strategic planning process to map out a detailed plan for the creation of a radically different education program within the region. The process included large meetings with staff, students, and the

community. With the help of the International Center for Leadership in Education the new supervisory union has mapped out a future centered on the following mission and vision.

WRVSU Vision

In the White River Valley Supervisory union, a world-class education is built upon strong relationships between and among students, teachers, families, and communities. All students are supported, challenged, and engaged with a personalized education. Learning is rigorous and relevant to student interests while preparing every child for college, career, and active citizenship.

WRVSU Mission

The White River Valley Supervisory Union serves our educational community with special emphasis on optimizing quality, opportunity, equity and efficiency. Our school system promotes cognitive, personal and social excellence as students flourish in a dynamic learning environment. We seek to empower each student to become a passionate, lifelong learner and an informed contributor to a rapidly changing society.

The plan calls for the creation of a unified high school program for operating towns, strong middle school opportunities for all students, and strengthened, more equitable experiences for elementary students. The strategic plan was adopted by the supervisory union in the summer of 2016 and is currently guiding educational improvements across the region. The full body of the strategic plan is attached to this document as **Appendix B**.

RESPONDING TO ACT 46

In the midst of all of this planning, Act 46 passed the 2015 legislature, driven by declining student population, increasing costs per student, and growing inequity in educational opportunities across the state.

Act 46 of 2015 became law in June, 2015. It calls for school districts in the state to come together to create somewhat greater scale in order to achieve the following goals:

Provide substantial equity in the quality and variety of educational opportunities

Lead students to achieve or exceed the State's Education Quality Standards

Maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with the goal of increasing the district-level ratio of students to full-time equivalent staff.

Promote transparency and accountability.

Deliver education at a cost that parents, voters, and taxpayers value.

The assumption inherent in the bill is that issues of quality, inequity of student opportunity, and the ever-increasing cost-per-student can best be addressed over the long-run by the creation of

somewhat larger school *districts*. The hope is that local regions will come together and figure out a viable pathway to achieve that objective. The bill includes incentives for districts to unify. It also includes the eventuality that the State Board can, in November, 2018, order unification, if regions have not developed their own approach to unification prior to that.

The issues identified in the legislation—equity, quality, opportunity, efficiency, and accountability— are the same issues that inspired the planning already completed by this region.

Act 46 Exploratory Committee

In response to the passage of the law, the 10 districts of the White River Valley Supervisory Union created an Exploratory Committee to examine the range of actions open to them. That work recommended the creation of three study committees:

Prekindergarten – Grade 12 Unified Union District

This type of district would operate all grades for all students. If four districts come together to create such a district, it would be a Regional Education District (RED) and would be eligible for incentives for the involved towns, and would not require a “side-by-side” partner. If there are fewer than four towns serving fewer than 1250 students, incentives will only be available with the creation of at least one of the other districts described below.

Prekindergarten-Grade X Union District with Tuitioning Beyond

This type of district would oversee all education of students, grades PreK-12, with common grades being operated (K-6 or K-8) and with common tuition options being offered for grades beyond the operating years. It is recommended that current districts contemplating joining a study committee for this type of union district come together informally in advance to agree tentatively on the operating grade levels and basic high school tuitioning practices. Although, together, they may agree to alter that decision during the study, ultimately this new district cannot have within itself multiple grade levels and disparate tuitioning practices.

Non-Operating District

This type of district would not operate any schools, but rather would tuition all students to other schools. The district would have to have one set of tuitioning policies covering all students.

The full exploratory committee report can be found in **Appendix C**.

Accordingly, three study committees were created and have all worked diligently to assess the advisability of moving forward with the creation of union school districts.

The WRVSU Proposal for Responding to Act 46

After an extended period of consideration, the study committees are proposing an overall approach which we believe will achieve the goals of Act 46, further our ability to achieve the vision laid out in our strategic plan, and allow communities to maintain different approaches to operating schools and tuitioning students.

The proposal involves the creation of three “side-by-side” union districts. It also includes the assumption that three current districts—Strafford, Sharon, and Stockbridge—will, at this time, establish themselves individually and in partnership with the rest of the supervisory union as part of an “alternative structure”.

The three proposed “side-by-side” union districts to be created are as follows:

The White River Unified District-- a PK-12 Operating Union School District serving Bethel, Rochester, and Royalton.

The First Branch District-- a PK-8 Operating/Grades 9-12 Tuitioning Union School District serving Chelsea and Tunbridge.

The Granville-Hancock Unified District-- a PK-12 Non-Operating Union School District serving Granville and Hancock.

These three districts will continue to be strongly linked through the White River Valley Supervisory Union and will operate under the vision and mission outlined in the strategic plan.

The WRVSU will continue to work to promote educational equity among the elementary schools, promoting best practices and strong professional development. The supervisory union will promote strong connections and cooperative programming and staff-sharing between the new districts. The supervisory union will support the development of strong middle schools in the operating districts and will promote the implementation of a middle school model characterized by hands-on learning, flexible scheduling and curriculum, dedicated staff teams, and strong relationships between and among students and staff. Finally, efforts will be made to assure a strong link between elementary and middle school programming and the programs of the new regional high school operated within the supervisory union. The supervisory union is committed to facilitating smooth transitions between various schools, whether a particular district operates all grade levels or whether they will tuition students between districts within the supervisory union. Below is a map of the Supervisory Union with the several proposed component districts.



A Word on Three Districts Currently Unable to Unify

The current districts of Strafford, Sharon, and Stockbridge have been important members of a study committee investigating the advisability of creating a PK-6 or PK-8 single district. After extensive meetings over a number of months, the districts involved in that study have come to the conclusion that there is not a basis for unification of those districts at this time. Key factors include geography, topography, historic connections, and operating/tuitioning/designation practices. Act 46 is clear in protecting historic patterns of operating and tuitioning. The situations, in brief, are as follows:

Strafford is unique in its operating/tuitioning patterns. It operates grades PK-8 education and designates Thetford Academy as its primary high school. Strafford has a seat on the Thetford Academy governing board. It does not desire to alter this highly successful arrangement. There are also cost concerns. To merge with the most logical neighbors would require Strafford to cease operating grades 7-8 and it has been determined that it would cost the town substantially more to tuition those students.

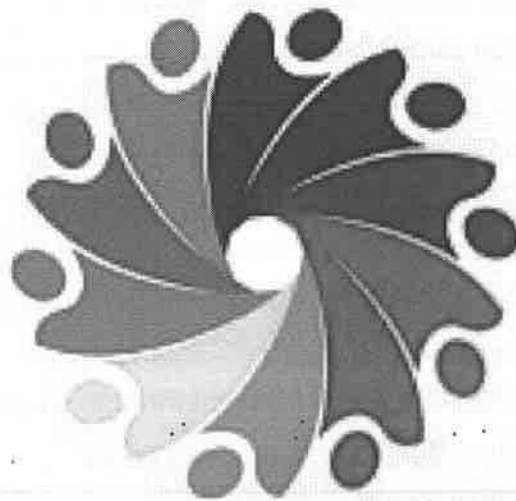
Sharon and Stockbridge are the only two districts in the Supervisory Union that operate PK-6 education with middle and high school choice thereafter. They worked hard to analyze the possibility of becoming a single, unified district. In the final analysis, this did not make sense to any of those involved given the substantial distances and community orientations. The Sharon School and Stockbridge Schools are 21 miles from one another. From one edge of their town to the far edge of the other is in excess of 30 miles. This makes serious collaborative ventures for elementary students very challenging. The other consideration is that, if the Stockbridge School becomes too small to sustain, all elementary students from Stockbridge would have to be bussed those many miles as opposed to attending much closer schools in contiguous towns.

An "alternative proposal" will be prepared with much more complete information and will be submitted following the completion of all unification votes.

It is also important to note that once the process for forming new districts comes to an end, the WRVSU will need to revisit its structure and rethink representation of the various size districts. We will approach the State Board with a proposal at the appropriate time, prior to July 1, 2018.

The detailed reports from each of the study committees follow.

Report on the Proposed Supervisory Union Boundary Change between Windsor Northwest and Orange-Windsor Supervisory Unions



VERMONT
SCHOOL BOARDS ASSOCIATION
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Vermont School Boards Association
January 6, 2015

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Credits

This Phase I Report was made possible through the efforts of:

Windsor Northwest (WNWSU) and Orange Windsor (OWSU) "Supervisory Union Integration Committee" (SIC) members

- Mr. Carl Groppe, WNWSU Chair (Stockbridge)
- Mr. David Eddy, Jr., WNWSU Member (Bethel)
- Mr. Bruce Hyde, WNWSU Member (Granville)
- Mr. Jeff Sherwin, WNWSU Member (Rochester)
- Mr. Donald Shaw, OWSU Chair (Sharon)
- Ms. Kathy Galluzzo, OWSU Member (Tunbridge)
- Mr. Geo Honigford, OWSU Member (Royalton)
- Mr. Paul Perkins, OWSU Member (Strafford)
- Mr. Joe Spinella, OWSU Member (Chelsea)

WNWSU and OWSU Administrators

- Ms. Meg Powden, WNWSU Superintendent
- Mr. Bruce Labs, OWSU Superintendent
- Ms. Donna Benoit, OWSU/WNWSU Business Manager

Vermont School Boards Association

- Mr. Stephen Dale, Executive Director
- Dr. Michael Deweese, Consultant
- Mr. Grant Geisler, Consultant

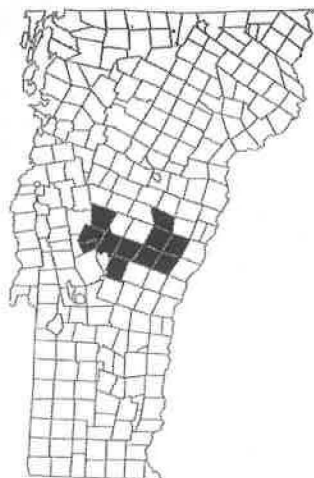
Vermont Agency of Education

- Dr. Vaughn Altemus

Also

- Mr. Frank Russell, WNWSU Board Member (Rochester)
- Ms. Deborah Matthews, OWSU Director of Special Services
- Ms. Kerri Lamb, VSBA Operations Manager
- Ms. Carol Sears, WNWSU Office

OWSU (Post Boundary Adjustment)



I. Joint Chairs' Letter to the State Board of Education

January 6, 2015

Vermont State Board of Education
c/o Mr. Perry Thompson
219 North Main Street
Barre, VT 05641

Dear Members of the State Board of Education,

The State Board of Education has, for the past year, been clear in its intent that the WNWSU be dissolved and that the member school districts be distributed to other area supervisory unions. The members of the WNWSU board have appreciated being given additional time to sort out the best course of action to align with others and have also appreciated being welcomed by two neighboring supervisory unions. The State Board of Education has already approved Pittsfield's request for transfer to the Windsor Central Supervisory Union July 1, 2015. Upon implementation of the State Board plan to dissolve the WNWSU, the OWSU has agreed to support the integration of the remaining districts into the OWSU, and the districts of the WNWSU have agreed that this direction makes sense, effective July 1, 2016.

At the direction of the State Board of Education, the WNWSU and the OWSU have been engaged in joint planning for the past ten weeks and have charted a preliminary course for this eventuality.

The Supervisory Integration Committee (SIC) has overseen this process. It is comprised of nine members—the current members of the executive committees of both SUs. The SIC has come together to do this work with the blessing of the ten boards who would be members of the new Supervisory Union.

The conclusions of the Supervisory Integration Committee are as follows:

Given the clear intentions of the State Board of Education to dissolve the WNWSU, and our desire to achieve the best results for our students and taxpayers, as a committee of the two SUs, we hereby state the following:

We understand that on January 20, the State Board will act as follows:

- *The WNWSU will be dissolved effective at the close of business on June 30, 2016.*
- *Effective July 1, 2016, the school districts of Bethel, Granville, Hancock, Rochester, and Stockbridge will be integrated into the current legal entity known as OWSU which already includes the districts of Chelsea, Royalton, Sharon, Strafford, and Tunbridge. The result will be a 10-district supervisory union.*

Assuming that action, the Supervisory Integration Committee makes the following additional statements and requests of the State Board:

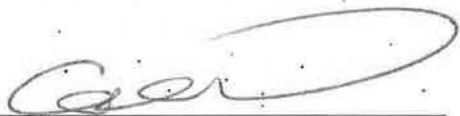
- *We ask that the State Board authorize the creation, on or before March 31, 2015, of a Transition Board which can act on behalf of the expanded supervisory union on matters*

which will govern the organization after July 1, 2016. The board will be created using the statutory guidelines for supervisory unions found in 16 VSA § 266. Consistent with 16 VSA § 261a. The Transition Board shall have the exclusive power to make decisions on behalf of the expanded supervisory union that will be in effect on July 1, 2016. It may enter into collective bargaining agreements, may enter into employment contracts, may adopt a budget for the 2016-17 school year, and otherwise make the usual decisions of a supervisory union board for matters affecting the new SU commencing July 1, 2016. The statutory powers of the current WNWSU and OWSU supervisory union boards will not be affected by the power of the new entity during the period of transition. The Transition Board shall have the power to receive and expend transition funds provided by the Agency of Education for use in planning and executing a smooth transition to the new supervisory union.

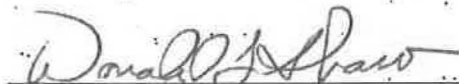
- The Transition Board reserves the right to return to the State Board with additional recommendations about the expanded OWSU's potential renaming, structure and operations, pursuant to the State Board's powers outlined in 16 VSA § 261(d).
- In addition, the two supervisory unions ask for State Board support in pursuing the following objectives that can help this effort achieve its full educational and financial objectives:
 - ✓ Adequate broadband connectivity to assure that all districts in the supervisory union have strong connectivity to facilitate the operation of an expansive supervisory union (including virtual community meeting attendance) and for school, student, family and business access to global learning and participation.
 - ✓ Priority access to state construction funds that are or may become available to support new construction or the renovation of existing buildings related to educational initiatives involving two or more districts within this supervisory union, as well as funds to support adequate technology infrastructure.
 - ✓ Grant dollars to support the creation and implementation of transformational education practices and programs involving multiple districts in the supervisory union.
 - ✓ Adjustments to Department of Labor rules that currently interfere with flexible pathways and community-based learning opportunities, most notably in the areas of student internships and cooperative learning placements.
 - ✓ Assistance in addressing the transportation challenges created through efforts to operate an expanded program across districts. This could include a waiver of state board rule related to "allowable transportation expenditures" to support greater movement of students between educational resources across the new SU. This could also include support through the Agency of Transportation and the Stagecoach in helping assure that parents across the district can have greater access to school programs and activities.

We look forward to meeting with you on January 20, 2015 to further discuss this letter and the attached report.

Sincerely yours,



*Carl Groppe, Chair
Windsor Northwest Supervisory Union*



*Don Shaw, Chair
Orange-Windsor Supervisory Union*

II. Overview: Integrating Windsor NW SU with Orange Windsor SU

In Vermont, all school districts are assigned to a supervisory union or are determined to be a supervisory district. Assignments to supervisory unions or supervisory districts fall within the purview of the State Board of Education. The State Board can assign districts based on its own prerogative, or upon review of requests from particular districts. The composition of supervisory unions and corresponding roles are addressed in statute.

Following an extensive review over the past several years, the State Board of Education has determined that the number of students currently served by WNWSU does not justify its continuation as a supervisory union. As a result, the Board intends to dissolve WNWSU and to direct the affected districts to associate with other area supervisory unions. The Board prefers the districts involved design a transformational model that would achieve this objective in a way that is most acceptable to them and provides the best chance for newfound efficiencies and educational improvements.

With the exception of Pittsfield, which has already been approved for transfer to Windsor Central Supervisory Union by the State Board of Education (effective July 1, 2015), local school district officials of WNWSU have asserted a preference to associate with the school districts of OWSU for purposes of creating a single and expanded supervisory union. OWSU has agreed to welcome those districts if a boundary adjustment transpires.

Upon considering joining together as a single supervisory union, school officials have identified a number of potential efficiencies and can begin to envision using the new structure as platform for exciting education enhancements for the students of the White River Valley.

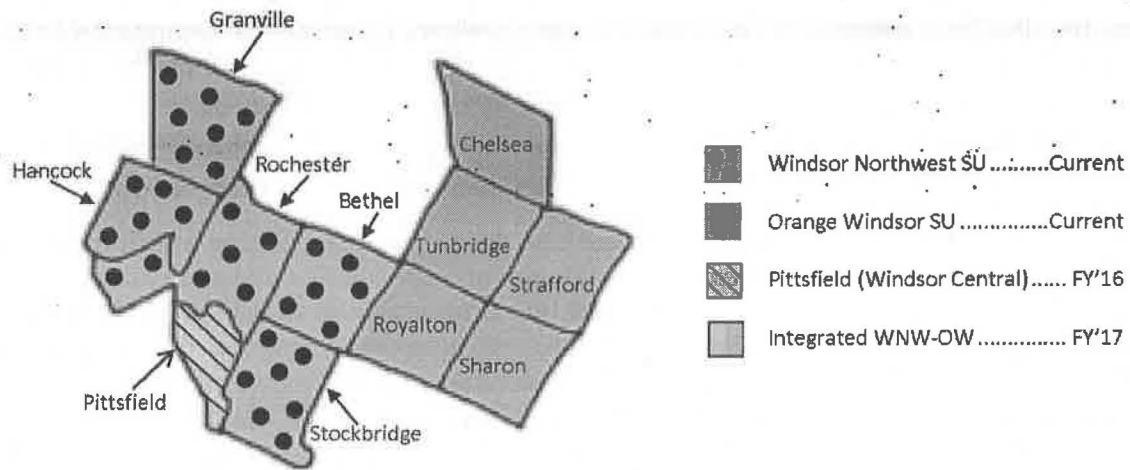
The process of bringing together the two supervisory unions involves two phases:

- Phase I—This study begins to lay out the potential benefits of the WNWSU and OWSU supervisory union integration and to identify the pathway to complete the integration. The Phase I study period is October 23, 2014 through January 5, 2015.
- Phase II—An implementation phase will be required, during which time plans will be finalized and implemented for a July 1, 2016 official transition date. The Phase II implementation period is January 21, 2015 – June 30, 2016.

The purpose of the Phase I study is to develop a vision and plans for the integration of WNWSU with OWSU and the creation of a new supervisory union entity. At the conclusion of Phase I, the study findings and conclusions will be reviewed with the State Board.

The general scope of the Phase I Study is as follows:

- Develop a common vision, mission, and desired results for the new supervisory union.
- Begin to envision the educational benefits of such an integrated union.
- Identify potential economic benefits of supervisory union integration.
- Begin to design how an expanded supervisory union will operate.
- Identify any conditions or contingencies to be recommended to the State Board.
- Plan for Phase II, most notably the composition and responsibilities of the Transition Board.

Map of School Districts Affiliations

Map courtesy of Kerri Lamb, VSBA

III. Data Points: WNWSU and OWSU

In FY'16, WNWSU and OWSU will comprise ten school districts. (WNWSU will be affected by a State Board of Education boundary adjustment at the end of FY'15, at which time Pittsfield will be relocated to Windsor Central Supervisory Union.) With a shared presence in four Vermont counties (reduced to three in FY'16), the two supervisory unions co-exist within a large geographic region and exemplify the state's school governance complexities.

The following data reflect the factual conditions of the districts, their schools, the governance structures, the existence of non-operating districts, financial information and the districts' children. Not as readily obvious are other factors including significant distances between some schools, the number of students with elective educational opportunities who choose schools outside their supervisory unions, and the modern day challenges for Vermont's small schools.

Yet, as this report illustrates, in our very rapidly changing world, the region's school board members and administrators are committed to addressing these conditions and needs in order to meet the contemporary needs of their communities' students.

Element	OWSU	WNWSU	WNWSU without Pittsfield*
SU Web Site	www.owsu.org	www.wnwsu.org	www.wnwsu.org
SU Mission Statement	The mission of the OWSU is to promote education as a vital service of its member towns and to promote the development of curriculum and instruction for the education of all. Relying on common interests and resources, OWSU strives to enhance the education of students residing in or attending public schools within its boundaries.	The WNWSU will establish conditions for academic excellence, social responsibility and personal meaning to ensure all WNWSU learners actively participate in and contribute to our local and global society.	<i>The WNWSU will establish conditions for academic excellence, social responsibility and personal meaning to ensure all WNWSU learners actively participate in and contribute to our local and global society.</i>
SU Member Districts with Operating Schools	<ul style="list-style-type: none"> ■ Chelsea ■ Royalton ■ Sharon ■ Strafford ■ Tunbridge 	<ul style="list-style-type: none"> ■ Bethel ■ Rochester ■ Stockbridge 	<ul style="list-style-type: none"> ■ <i>Bethel</i> ■ <i>Rochester</i> ■ <i>Stockbridge</i>
SU Member Non-operating Districts	(none)	<ul style="list-style-type: none"> ■ Granville ■ Hancock ■ Pittsfield 	<ul style="list-style-type: none"> ■ <i>Granville</i> ■ <i>Hancock</i>
Counties	Orange, Windsor	Windsor, Addison, Rutland	<i>Windsor, Addison</i>
SU Square Miles	210.0	258.6	238.6

Element	OWSU	WNWSU	WNWSU without Pittsfield*																																
Total School District Board Members	21	22	19																																
SU Board Members	15	12	11																																
Schools/Grades	<ul style="list-style-type: none">• Chelsea Public School (K-12)• The Newton School (K-8)• Sharon Elementary School (PK-6)• South Royalton School (PK-12)• Tunbridge Central School (K-8)	<ul style="list-style-type: none">• Bethel Elementary (PK-6)• Whitcomb Jr/Sr HS (7-12)• Rochester School (PK-12)• Stockbridge Central School (PK-6)	<ul style="list-style-type: none">• Bethel Elementary (K-6)• Whitcomb Jr/Sr HS (7-12)• Rochester School (K-12)• Stockbridge Central School (PK-6)																																
ADM for FY'14	889.79	639.62	569.07																																
SU % Special Education	18.07%	14.81% **	14.81%**																																
SU % Free and Reduced Eligibility FY'14	49.63%	56.25%	56.25																																
Total FY'15 Budgets	<table><tr><td>Chelsea</td><td>\$3,285,104</td></tr><tr><td>S. Royalton</td><td>\$6,023,335</td></tr><tr><td>Sharon</td><td>\$4,073,189</td></tr><tr><td>Strafford</td><td>\$3,176,285</td></tr><tr><td>Tunbridge</td><td>\$3,104,984</td></tr></table>	Chelsea	\$3,285,104	S. Royalton	\$6,023,335	Sharon	\$4,073,189	Strafford	\$3,176,285	Tunbridge	\$3,104,984	<table><tr><td>Bethel</td><td>\$5,351,363</td></tr><tr><td>Granville</td><td>\$602,640</td></tr><tr><td>Hancock</td><td>\$998,089</td></tr><tr><td>Pittsfield</td><td>\$1,422,309</td></tr><tr><td>Rochester</td><td>\$3,244,523</td></tr><tr><td>Stockbridge</td><td>\$1,996,481</td></tr></table>	Bethel	\$5,351,363	Granville	\$602,640	Hancock	\$998,089	Pittsfield	\$1,422,309	Rochester	\$3,244,523	Stockbridge	\$1,996,481	<table><tr><td>Bethel</td><td>\$5,351,363</td></tr><tr><td>Granville</td><td>\$602,640</td></tr><tr><td>Hancock</td><td>\$998,089</td></tr><tr><td>Rochester</td><td>\$3,244,523</td></tr><tr><td>Stockbridge</td><td>\$1,996,481</td></tr></table>	Bethel	\$5,351,363	Granville	\$602,640	Hancock	\$998,089	Rochester	\$3,244,523	Stockbridge	\$1,996,481
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* Some values in this column may not change, as Pittsfield is a non-operating school district.

** Value did not change because per AoE reporting standards, Pittsfield's (and also Granville's) values are not reported because counts less than eleven (11) are suppressed so as not to make students' information personally identifiable.

Detailed information regarding each local district may be found in Appendix B.

IV. Summary of Recent History

Background

The WNWSU board and the OWSU board, through their respective Executive Committees, have been meeting earnestly over the past half-year in response to the Vermont State Board of Education's invitation to address a pending boundary adjustment affecting both supervisory unions. Specifically, the boundary adjustment will result in the dissolution of WNWSU (upon the close of business on June 30, 2016), with its then-member districts¹ being integrated into the OWSU, effective July 1, 2016.

Recent Historical Context

A series of recent events and decisions has informed the Phase I study. A summary chronology follows.

2007-2012: WNWSU experiences a period of declining enrollment, fiscal (fund balance) issues within some member districts, resignation of a superintendent, installation of an interim superintendent, inability to recruit stable fiscal management leadership, considerations given to consolidation options, dialogues over educational quality interests, closing of the joint Granville/Hancock Elementary School, a supervisory union needs assessment, formation of a document entitled "consolidation-merger-regrouping initiative" (summarized as favorable movement and obstacles), progress in consolidation of some operations, RED consideration, concerns over facilities issues, and explorations with neighbors about governance options.

March, 2011: WNWSU Chair Carl Groppe summarizes his board's status to the Commissioner and SBE Chair: *"There are no clear and reasonable destinations that can be determined with respect to conducting business in conjunction with Act 153."*

May, 2011: SBE declines to grant the petitions of Bethel and Rochester voters to regroup their respective school districts into one or more different supervisory unions.

December, 2012: SBE votes to place WNWSU under consideration for a comprehensive supervisory union study (a.k.a. "Boundary Change Study") to be conducted by the Department of Education. The timeline identified is January 1 - May 30, 2013, with any resulting implementation to be effective July 1, 2014. WNWSU Superintendent Poljacik requests the Department conduct the survey, as previous regional efforts had not surfaced any willing partners.

May, 2013: SBE approves extension of the timeline for the WNWSU Boundary Change Study deadline to November 19, 2013.

¹ The current (FY'15) member districts of WNWSU includes Bethel, Granville, Hancock, Pittsfield, Rochester and Stockbridge. Effective July 1, 2015, the Pittsfield Town School district will experience a State Board of Education approved boundary adjustment, resulting in its inclusion among the member districts of Windsor South Supervisory Union. The remaining F'16 members of WNWSU will experience a boundary adjustment with OWSU.

June 2013: For inclusion in the AoE² Boundary Change Study Report, AoE contracts with Consultant Norman Andrews to undertake the financial feasibility of consolidating the school districts of Granville and Hancock (into Washington West); Bethel and Rochester (into OWSU); and Stockbridge and Pittsfield (into Windsor Central). No predetermined outcomes are asserted, and Mr. Andrews has license to study other potential combinations. Mr. Andrews' report is due before the SBE for its November, 2013 meeting.

July - September 2013: Mr. Andrews provides courtesy updates of his preliminary findings to the WNWSU board. He foreshadows six specific areas to be included in his pending report to AoE: (1) variances between WNWSU member districts' special education assessments and actual costs; (2) perceived administrative overstaffing within WNWSU on the basis of scale; (3) other education-neutral cost savings; (4) effects on Consolidated Federal Grant funding and practices among member districts; (5) EEE grant implications; and (6) pending impact of possible legislative directions.

September 2013: WNWSU Chair Groppe submits a letter to Secretary Vilaseca following the Secretary's presentation in August to the WNWSU board. Mr. Groppe's comprehensive letter addresses educational impact, special education, Consolidated Federal Grant, consolidation costs, and a need to delve more deeply into policy issues related to governance changes as related to shared services and costs. Mr. Groppe further addresses the timeline implications, including a need to proceed with a WNWSU superintendent search. The letter closes with an expressed willingness to consider voluntary merger with another supervisory union.

November 2013: SBE receives the Agency's Boundary Change Study (including elements of Mr. Andrews' report). WNWSU Board Chair Groppe states concerns over some elements of the study, including some asserted cost-savings projections, governance issues, and transitional costs. SBE takes a straw vote on the Agency's proposal for reallocating the districts of WNWSU to three supervisory unions with unanimous assent. The discussion is summarized in the SBE's minutes as:

"The four supervisory unions (WNWSU, OWSU, Windsor Central, and Washington West) are to come together, with assistance from the AoE (and whoever else may be needed) to come up with/work out a plan that will accomplish the goal of dissolving the supervisory union and moving the respective towns into the adjacent SUs with the ultimate goal of providing increased opportunities for students. If that cannot be accomplished, the SBE will vote in December on what has been laid out in the AoE report."³

The region's superintendents are afforded one month to recommend an alternative plan to the SBE for the reallocation of WNWSU member districts.

December 2013: SBE tables discussion and vote of WNWSU dissolution or regrouping details until June, 2014. WNWSU Superintendent Poljacik advises the WNWSU Executive Board that he believes SBE will impose a decision unless some local/regional determination is proposed.

² The former Vermont Department of Education was renamed the Vermont Agency of Education.

³ Vermont State Board of Education: Approved meeting minutes 11.19.13.

March 2014: Unanimous vote of the Pittsfield Town School District electorate requesting a boundary change to Windsor Central Supervisory Union.

May - June 2014: Five of the region's six superintendents (WNWSU Superintendent Poljacik does not sign the letter) propose the reassignment of WNWSU to OWSU with stipulations. WNWSU board members object to some of the governance-related stipulations. SBE Chair Stephen Morse expresses frustration that the superintendents' plan does not have the full boards' support.

June 2014: Secretary Rebecca Holcombe recommends two actions to SBE: (1) for the Board to delay taking action on WNWSU until January 20, 2015, and (2) for the State Board to direct WNWSU and OWSU to undertake a more detailed study of *"the advantages and costs of various allocations of districts from the perspective of improved educational opportunity of students and increased efficiencies."* SBE motion so carries.⁴ SBE further approves Pittsfield's request to move from WNWSU to Windsor Central Supervisory Union as of July 1, 2015 through a boundary adjustment.

July – mid October 2014: WNWSU Merger Task Force (consisting of one member from each of all boards, except Pittsfield) explores and advances the conversation. Boards' respective interests were identified through a common consolidation-related question set (August, 2014).

October 2014: WNWSU Superintendent Meg Powden files a report with SBE: "WNWSU's Interim Report Regarding Dissolution of the Supervisory Union and Merger of the Supervisory Union's Districts."

October 2014: AoE approves grant for purpose of studying merger of WNWSU and OWSU; OWSU will serve as the fiduciary agent.

October 2014: VSBA commences consultation with joint WNWSU/ OWSU "Supervisory Integration Committee" (SIC) to prepare SBE report, with a submission deadline of January 5, 2015.

October 2014 - January 2015: SIC meets on a regular basis to complete Phase I report to SBE.

January 5, 2015: Affirmative vote by WNWSU and OWSU boards in support of Phase I report to SBE regarding the supervisory union integration.

January 20, 2015: Scheduled vote by SBE on WNWSU~OWSU integration.

⁴ Vermont State Board of Education: Approved meeting minutes 06.24.14.

V. Phase I: Process and Outcomes

The Joint Planning Process (October 2014 - January 2015)

The two involved supervisory unions have chosen to come together to plan for a future as part of the same supervisory union, should the State Board so order. They have designated their two executive committees to come together as a Supervisory Integration Committee (also referred to in this document as the SIC). It is hoped that this work provides a blueprint for a subsequent Transition Board's consideration.

The committee met on seven occasions between October 23, 2014 and January 5, 2015. Meeting minutes are found in Appendix A. The tasks of this group have been to:

- Envision the potential of a new, integrated supervisory union.
- Create values, vision, mission, and goals for an integrated entity.
- Begin to identify potential educational benefits from an enlarged entity.
- Estimate the potential efficiencies and economies of scale that can be achieved from such integration.
- Create the foundation for a new way of operating a large supervisory union, extending over a broad geographical area with many separate districts.
- Create the framework for the operation of a transition committee.
- Identify state-level supports that can promote the success of this effort.

The Case for an Expanded Supervisory Union

The WNWSU is proposed to discontinue operation at the close of business on June 30, 2016 and to become fully integrated within the current OWSU the following day (July 1, 2016). The two current organizations are committed to coming together in a way that will create a larger, vibrant organization, driven by a strong, unified vision, whose values and goals recognize that the size and scope of the organization will require a whole new way of operating, both to achieve educational goals and to attract and retain high quality leadership. The expanded organization may have a new name, to be determined during the implementation phase.

The creation of the new supervisory union is not simply the merging of business functions or the changing of boundaries; rather, it is building a foundational structure that will:

- Allow for the creation of an exceptional education experience for all children in the White River Valley.
- Ensure strong leadership to support the education program throughout the region.
- Achieve immediate efficiencies and create the potential for greater cost-effectiveness over time.

The board members of the ten boards embrace the need for change and commit to establishing a new and exciting educational system in coming years.

The SIC developed a strategic framework to guide the ongoing development of the integrated supervisory union. We present it as a blueprint for the Transition Board to develop a more complete strategic plan.

Organizational Values

The following foundational values (listed in no particular order) will serve the new organization as asserted by the SIC:

Safety—We will create an environment that is physically and emotionally safe for all members of the education community—students, parents, staff, and citizens.

Student-Centeredness—Our focus will be on what is best for students. We believe that all students must have equal opportunity to grow and develop and pursue their hopes and dreams.

High Expectations—We value excellence and have high expectations of our students, our staff, our schools, and ourselves.

Trust—We will create an environment characterized by high trust among boards, administrators, teachers and staff, parents, and citizens. Trust will grow from a sense of mutual respect and from transparency.

Community—We value the many separate communities in the region and respect the unique characteristics and history of each. We respect the varied choices made by towns with some operating schools, some that tuition students, and some having a combination of the two.

Financial Responsibility—We will operate a system which achieves our mission in the most efficient manner possible, will assure a strong return on taxpayer investment, and will build public trust.

Innovation—We value innovation. We live in a very dynamic environment and will seek to anticipate the future and adapt and proactively tailor our approaches to meet new challenges, rather than simply reacting to crises.

Vision

We envision an education system in the White River Valley where students are engaged in vibrant educational experiences that prepare them for college, career, and life in a democratic society. From experiences within and beyond the walls of our school buildings, students emerge from our education system with academic proficiencies and transferable skills, including clear and effective communication, self-direction, creative and practical problem solving, responsible and involved citizenship, and informed and integrated thinking. The cost of education is sustainable and strongly supported by our communities. Families seek to reside in the region both because of our strong, healthy communities and our exceptional education system.

Mission of the Expanded Supervisory Union

The mission of the expanded supervisory union is to promote the creation and sustainability of a world-class educational system in the White River Valley of Vermont. We will strive to:

- Ensure equal educational opportunities for all students.
- Provide a broad range of opportunities for personalized learning using facilities and resources throughout the supervisory union.
- Engage all students and promote high student achievement.
- Engage all citizens in supporting education and the need for innovation.
- Achieve a highly efficient operation that produces excellent education for students and great value for taxpayers.

Desired Results

I. Exceptional student outcomes

All students are highly engaged in learning and achieve at a high level.

Indicators:

- Balanced assessment indicators show excellence.
- Student and parent surveys reflect satisfaction.
- Special Education is less in demand as a result of effective early intervention.
- The achievement gap is substantially diminished.

II. Equal opportunity for high quality student education

Every student in the region has the opportunity for an excellent education built on a strong, rigorous, common curriculum and strong support for personalized learning. Equity is achieved by raising the quality and quantity of opportunities for all students. A wide range of opportunities is available to all students within the region, including "flexible pathways" and special education services.

Indicators:

- Reduced disparity between the educational offerings available to students across different towns.
- Measures of "Student Opportunity" show more equitable outcomes.
- Technological resources available to students are comparable across the region.
- Students from all towns have vibrant and engaged after-school and summer programs with experiential learning.
- A greater percentage of students choose to receive their education from programs operated within the supervisory union.

III. Efficiency and Cost-Effectiveness

The education system is functioning with maximum efficiency, avoiding redundancy, and effectively using staff in the achievement of its mission. The region constantly seeks to identify areas where resources can be shared or activities coordinated or combined to increase effectiveness and efficiency. School buildings are used effectively and efficiently and are managed as a system of resources rather than as isolated buildings.

Indicators:

- Increases in cost per-student, if any, are modest across the system.
- There is evidence of strong attention to issues of efficiency.
- Staff/student and teacher/student ratios are managed.

IV. Strong support of and connection to local communities

The communities of the region remain strongly connected physically and emotionally to the education system. The education system respects and fully utilizes the priorities and strengths of each community and the local schools. Community members continue to volunteer and participate in the education of students and continue to display strong support for education. The district is marked by strong communications where students, parents, citizens, and the broader media are well informed and engaged in education.

Indicators:

- Community feedback is favorable.
- Budgets receive voter approval.
- Community volunteerism continues at a high level.

V. Exceptionally well managed systems

The supervisory union provides exceptional "centralized services" as defined in statute. Those include:

- *Curriculum is well coordinated across the supervisory union.*
- *Teachers across the supervisory union have comprehensive, integrated professional development options.*
- *Business functions and human resources management are integrated, state of the art, streamlined, and provide accurate and timely information.*
- *Transportation is effective and efficient. The system assures great access and facilitates student opportunity.*
- *Special education is effectively and efficiently delivered throughout the supervisory union.*
- *Student data systems are integrated and accurate.*
- *Technology systems are centrally managed and supported with excellence, keeping districts across the supervisory union on the cutting edge.*
- *Collective bargaining is handled efficiently and effectively and promotes educational priorities and flexible use of staff.*

The supervisory union is engaged in regular strategic planning and monitoring of outcomes across the system. The supervisory union spends relatively less time managing crises.

Indicators:

- Satisfaction of school staff, parents, and others.
- All districts in the supervisory union experience have a strong financial position and display sound financial management practices.

VI. Strong Leadership

The education system in the region operates as an integrated entity focused on vision, mission, and results. Administrators and board members are committed to the best interests of every student in the region. Teachers, administrators, support staff, students, and parents are very favorable about the system. The supervisory union has strong continuity in leadership, and both board members and administrators are clear about respective roles and responsibilities. The system across the supervisory union enjoys the strong confidence of citizens.

Indicators:

- Surveys of students, parents, staff, administrators, and board members reflect strong leadership.
- Staff, administrator, and board turnover rates are relatively low.

Increased Educational Opportunities for Students

The driving force behind any structural change must be the potential benefits for students. The preceding sections of this report outline the aspirations of the members of the SIC. Their commitment is to use the creation of the larger supervisory union as a catalyst for action to assure a world-class education for every child in the supervisory union.

The integration of supervisory unions will have important immediate benefits provided there is focused follow through by administrators and boards and strong engagement with teachers, staff and communities. More dramatic change in educational opportunities will require additional planning and decision-making by districts (boards and their electorates) in order to proceed. Some of the more ambitious ideas generated will require the creation of various types of joint ventures or mergers which are beyond the authority of any supervisory union board.

This structural change creates a foundation for immediate efforts and for larger-scale planning. It is an important vehicle for focusing superintendent time, for building energy toward a common vision, and for developing relationships among board members, administrators, teachers, and communities.

During the relatively brief period of this study, many opportunities for enhancing education program were identified, both through discussions with administrators and through meetings of the Supervisory Integration Committee. It is fully understood that an early priority in a second planning phase will be to fully engage teachers and staff and the broader community to generate ideas and action. This process has only scratched the surface of the possibilities. Below is a listing of some of the potential educational benefits, both those that can occur from the supervisory union integration, alone, and those that will require additional action and process by member districts.

The immediate educational benefits of coming together may include the following:

- Expanded professional development offerings and peer support.
- Expanded technology resources, technology support, and creation of virtual learning opportunities.
- Expanded curriculum opportunities through coordination and sharing across districts.
- Identification of options for more efficient and effective deployment of staff for program enhancement or greater efficiency.
- Greater opportunities to compete for grants that can enhance the district's adherence to Education Quality Standards and promote personalized learning and other transformational efforts.
- Greater opportunity to attract a post-secondary partnership to increase high school dual enrollment options.
- Greater ability to create a partnership with a post-secondary institution for placing student teachers and interns.
- Supporting teachers interested in expanding their repertoires and versatility through their acquisition of multiple license endorsements.

In considering longer-term, more dramatic change, several ideas came forth designed to provide students in this region a broader array of opportunities. Most of these ideas will require a deeper discussion among interested districts as they could involve joint contracts or mergers. Examples of larger ideas include:

- Enhanced middle school alternatives available to students through coordination of programs or through joint ventures or mergers.
- A united or integrated high school program among any or all of the four current high schools—either at multiple locations or through the creation of a new regional high school.
- Development of magnet schools or schools as "specialized centers of excellence."
- Development of a comprehensive approach to effectively serving students of the region through studying factors drawing students away from their local schools and seeking to replicate or exceed those external educational offerings within the new supervisory union.

Increased Economies of Scale and Enhanced Cost Efficiencies

Mr. Grant Geisler provided financial analyses for this study. Mr. Geisler serves as the Chief Financial Officer/Chief Operations Officer with Chittenden Central Supervisory Union. He is an active member with the Vermont Association of School Business Officials (VASBO), and is a VASBO Past President.

With his analysis of the impacts of combining WNWSU and OWSUs through the proposed boundary adjustment (resulting in an expanded OWSU), Mr. Geisler explored three specific focal areas:

- Potential Financial Savings
- Existing Assessment Methodologies
- Proposed Assessment Methodology

Two key understandings support the analysis:

- All of the existing school districts in both supervisory unions, with the exception of Pittsfield, will be part of the expanded OWSU.
- FY'15 approved budgets are used for purposes of analysis. The ensuing analyses demonstrate how the FY'15 budget could have been built and assessed, had the boundary adjustment already been in place.

Potential Financial Savings. Budget elements of staffing, office space, and financial management software are noted to have at least some inherent redundancies.

* Staffing. In consolidating two supervisory union offices to one, improved economies of scale will lead to overall staffing reductions at the central office level. For purposes of modeling, some positions were added (through the reinvestment of salary and benefits savings) or some part-time equivalencies increased in anticipation of increased workload or desired improvements. Otherwise redundant positions will be eliminated.

Any representation of specific personnel required with an expanded supervisory union within this analysis is an arbitrary exercise. The specific determination of staffing will be identified by the supervisory union board (or for FY'17, by the Transition Board). However, with assumptions, a preliminary savings of \$300,000 in personnel costs for the first year is a reasonable estimation.

<u>Potential Savings:</u>	
Personnel	\$300,000
Office space	\$ 4,200
Less software	<u>\$ 10,000</u>
Total	\$314,200

* Office Space. With one office for the expanded supervisory union, less total office space will be required than that of the otherwise combined WNWSU and OWSUs' offices. However, more space than the present OWSU square footage is necessary to serve the expanding supervisory union. Assuming relocation to a different (and somewhat larger) space, and using conservative local lease costs per square foot, a savings of \$4,200 for the first year is a reasonable assumption.

* Financial Management Software. The two supervisory unions use different financial software management platforms. By maintaining the software in use by OWSU and eliminating the platform in use by WNWSU will yield a first year savings of approximately \$10,000.

Additional savings by specific districts could be achievable as stronger connections are built between districts and opportunities emerge for more efficient deployment of staff.

Supervisory Union Assessment Methodologies

A challenge that will need to be undertaken by the Transition Board is the determination of how to allocate costs in the new supervisory union.

Existing Assessment Methodologies. Variations in assessment methodologies exist among the state's supervisory unions. Locally, assessment methodology differences exist between WNWSU and OWSU. Each is summarized as follows:

- WNWSU
 - General Funds – Based on prior year ADM
 - Special Education & EEE – Based on an average Child Count (over a 3-year period) and ADM (also over a 3-year period)
 - Challenges
 - Non-Operating Districts are assessed at the same rate as Operating Districts
 - Large shifts in ADM could drive dramatic swings in general fund assessment from year to year
- OWSU
 - General Funds – Based on November student enrollment
 - Special Education & EEE – Based on prior year equalized pupil count
 - Challenges to the methodologies
 - Large shifts in enrollment could drive dramatic swings in assessment from year to year

Proposed Assessment Considerations. A single, expanded supervisory union has assessment methodology options to consider. When viewed through a “financial lens,” any methodology will have a different effect on the member districts, resulting in perceived “winners and losers.” The Transition Board will determine the first year methodology (or methodologies), and should consider:

- Most methodologies use some type of student count (enrollment, ADM, equalized pupils, child count)
- Several other methodologies are possible (e.g., percentage of staff, square footage, etc.)
- Using a single year data point can result in dramatic swings from year to year.

Mid to long-range supervisory union assessment methodology options will require future board discussions. Upon considering use of calculated equalized pupil counts, implications of the 3.5% hold harmless adjustment provision need to be studied. Whether or not the hold harmless provision continues in future years, the equalized pupil count *prior to adjustment* is the more equitable approach. Implications stemming from use of the calculated equalized pupil counts include:

- Being the only count averaged over a two-year period, which is also a key factor in tax rate calculations.
- Using the calculated count (prior to the hold harmless adjustment) would eliminate the current artificially high numbers for Granville and Rochester.

- There may need to be specific assessment adjustments for Granville and Hancock since these non-operating districts will require comparatively fewer supervisory union services. Treatment across the state for non-operating districts' assessments vary; a discounted assessment factor (perhaps 0.75) is an option.

Ideas for Operating a Substantially Expanded Supervisory Union

The SIC is keenly aware of the complexities involved in operating a large and rural supervisory union in a thoughtful, intentional, and integrated fashion. The Committee is committed to creating a highly functional supervisory union that can realize a shared vision for students, attract and retain strong educational leadership, and maintain strong connections among the many smaller communities in the region. This will require a strategic approach to designing how the expanded supervisory union and its member districts operate.

Currently, district boards meet once or twice per month (one supervisory union board meets monthly while the other meets bimonthly). Executive Committees meet monthly in both supervisory unions. Within the two existing smaller supervisory unions, this has been problematic, but possible. In the new supervisory union, with ten districts, this will not be practical. If nothing changes, a single superintendent and key administrative staff will need to attend a minimum of 13-14 night meetings (out of a possible 16-17 week nights each month). It will also not be possible for the members of ten district boards to get to know each other and to create the trust and energy for change that will be required to achieve the vision. The status quo approach will simply not work. This is a time for high energy and ingenuity and will require that the new supervisory union and its member districts experiment with new meeting structures and adjust as needed. The Transition Board will need to spend further time developing the detailed plan for this effort.

The SIC has brainstormed alternatives for action. Some of the ideas generated include:

- Assure the full supervisory union board meets with sufficient frequency to develop trusting relationships among districts and to assure a common focus on a broad agenda for education.
- Revisit the purpose of district and supervisory union meetings and structure them accordingly: Be clear on the role of a supervisory union executive committee.
- Consider centrally-held "carousel meetings" with some regularity; with locally held meetings held on the other months, but assure electronic access to all meetings by all communities. (Bring electronic participation to a new art form!)
- Assure meeting time is spent as a precious resource and that meetings be designed and executed to achieve particular purposes. Do not use meetings for simple communications, but use other vehicles for that. Meetings should be to move forward the joint agenda. Consider, as part of the planning, determining how much administrator time is to be devoted to preparing for, attending, and following up on board meetings and creating a structure which gets the job done within that capacity.

- Lay out a yearly calendar for all meetings with the mix of district-based and centrally held meetings—tailor the schedule to adapt to particular needs during the year.
- Engage all board members (both those who are official appointees to the supervisory union board and those who are not) in committees of the supervisory union.

Ultimately, the Transition Board must make structural decisions for the expanded supervisory union. The complete results of the SIC's brainstorming activity on this important topic may be found in Appendix C (Operating/Structural Brainstorm Ideas from the December 4 Meeting).

VI. Phase II: The Path Ahead

Phase II will commence on January 21, 2015 and run through June 30, 2016. The Transition Board will address all issues necessary for the successful "cut over" to the expanded OWSU. In synchronous fashion, Superintendents Labs and Powden will prepare their supervisory unions for a smooth administrative transition.

Pre-boundary Change Opportunities (Present through June 30, 2016)

Shared leadership between WNWSU and OWSU is central to the early success of an expanded supervisory union. Through the encouragement of the boards and the progressive thinking of Superintendents Labs and Powden, work is already underway to effectuate the pending transition. Examples of such efforts include:

- Strategic planning related to collective bargaining timelines.
- Planning for shared professional development.
- Co-employment of a common Business Manager.
- Sharing a common central office location.
- Planning for a side-by-side operation of central office functions during FY'16, operating in a merged fashion whenever possible.
- Joint administrative team meetings.

Structure of the Transition Board

Effective on or before March 31, 2015, a Transition Board will be created using the statutory guidelines for supervisory unions found in 16 VSA § 266. Each district board will need to designate its representatives to the Transition Board.

The transition board shall have the power to make decisions on behalf of the expanded Supervisory Union that will be in effect on July 1, 2016. It may enter into collective bargaining agreements, may enter into employment contracts, will adopt a supervisory union budget for the 2016-17 school year, and otherwise make the usual decisions of a supervisory union board for matters affecting the new supervisory union after July 1, 2016. The powers of the current WNWSU and OWSU supervisory union boards will not be affected by the powers of the Transition Board during the period of transition. The Transition Board shall have the power to receive and expend transition funds provided by the Agency of Education for use in planning and executing a smooth transition to the new SU.

The Transition Board reserves the right to return to the State Board with additional recommendations about the supervisory union name, structure and operations, pursuant to the State Board's powers outlined in 16 VSA § 261(d).

The Work of the Transition Board

The Transition Board will have a large job ahead to oversee the planning and implementation for a new and expanded supervisory union.

Legally, the order of the State Board will constitute an enlargement of the entity that is now OWSU. Practically, this change involves the coming together of two large organizations. There is much to be done to merge cultures and operations.

The first task of the Transition Board will be to map out all results and action steps that will need to be achieved and completed prior to the actual effective date, July 1, 2016. A preliminary list of the work may include the items listed below—some of which will largely be administrative work, some will be board work. The board will need to monitor progress to assure readiness by July 1, 2016. It is, by no means, a complete list:

- Select a name for the enlarged supervisory union.
- Commit to a vision for the new supervisory union (hopefully using the extensive work of the SIC).
- Create and implement a plan for the merging of two cultures and the full engagement of teachers, staff, and communities in the work ahead.
- Finalize long-term decisions about executive leadership of the new supervisory union.
- Develop and implement a plan for the convergence of central office and centrally administered functions.
- Decide on space for the new central office operation.
- Develop and implement a plan for selection of the key staff leadership for the new supervisory union and the transition of those staff.
- Develop and implement a plan for the convergence of collective bargaining agreements.
- Merge human resources policies.
- Create a merged policy-development process and a new set of policies.
- Finalize the plan for operating the new supervisory union (meeting protocols and schedules) for the first year.
- Create a budget for 2016-2017.
- Decide an initial assessment methodology for distributing costs of the new supervisory union.
- Develop and implement a communications strategy to assure strong understanding and involvement among staff, parents, and the broader community.
- Develop strategies for education enhancement and greater efficiencies.

State Support for a Successful Transition and Beyond

The Supervisory Integration Committee has embraced the complex challenges involved with the pending dissolution of WNWSU and its subsequent integration with OWSU. While the State Board's intentions to implement the pending boundary adjustments have been clear, SIC's members have approached this task with a cooperative spirit, open minds, and a shared desire to positively impact our region's future educational structures:

Our operating ethic has been student and taxpayer-centered throughout Phase I. The State Board's deadline extension has enabled a responsible level of SIC discourse; a more deliberate "desired state" as evidenced in this report is the result. The SIC is proud to have laid the foundation for the Transition Board's work ahead.

To achieve our vision for exceptional education and high efficiency, we will need a continued strong partnership with the Agency of Education, the State Board, and other state entities. While we understand the State Board's limited powers, we ask for your support in pursuing the following objectives that can help this effort achieve its full educational and financial objectives:

- Adequate broadband connectivity to assure that all districts in the supervisory union have strong connectivity to facilitate the operation of an expansive supervisory union (including virtual community meeting attendance) and for school, student, family and business access to global learning and participation.
- Priority access to state construction funds that are or may become available to support new construction or the renovation of existing buildings related to educational initiatives involving two or more districts within this supervisory union, as well as funds to support adequate technology infrastructure.
- Grant dollars to support the creation and implementation of transformational education practices and programs involving multiple districts in the supervisory union. A specific and immediate example is The Agency of Education's designation of a central Vermont supervisory union for year three of the States Personnel Development Grants program (SPDG), a federally funded grant used in Vermont to develop a Multi-Tiered System of Support (MTSS) (and early learning and transitions for special education students similar to the School Wide Integrated Framework for Transformation (SWIFT) initiative). The types of staff development and resources available through this grant would enable educators to work collaboratively on education benefits and bring forth positive results for children across the expanded supervisory union.
- Adjustments to Department of Labor rules that currently interfere with flexible pathways and community-based learning opportunities, most notably in the areas of student internships and cooperative learning placements.
- Assistance in addressing the transportation challenges created through efforts to operate an expanded program across districts. This could include a waiver of state board rule related to "allowable transportation expenditures" to support greater movement of students between educational resources across the new SU. This could also include support through the Agency of Transportation and the Stagecoach in helping assure that parents across the district can have greater access to school programs and activities.

WNWSU and the OWSU have been engaged in joint planning for the past ten weeks and have charted this preliminary course for your consideration. Should the state board decide to dissolve the WNWSU and integrate the remaining five districts into OWSU, we stand ready to make it work effectively for students and for taxpayers.

Appendix A: Supervisory Integration Committee Meeting Minutes

To: WNWSU AND OWSU SUPERVISORY INTEGRATION COMMITTEE

From: Steve Dale, VSBA Consultant

Date: November 3, 2014

Subject: Notes from First Meeting (10/23/14)

The Supervisory Integration Committee met for the first time on October 23, 2014 to get organized for Phase I of its effort to bring together two Supervisory Unions into one.

The committee was joined by consultants, Steve Dale and Mike Deweese from the Vermont School Boards Association.

The first half of the meeting featured a review of the history, a clarification of the goals of this entire effort, a description of "Phase I" and "Phase II", and clarification of the difference between joining SUs and creating new joint schools or new union districts within the new SU.

During the second half of the meeting, the following decisions were made:

Nature of the merger—

It was agreed that this effort involved the eventual dissolution of the WNWSU business operation and the integrating of that operation fully with the OWSU operation by July 1, 2016.

However, it was also agreed that the two current SUs, through a merger, would be creating a new entity, with a new name and new mission, goals, and values, and a new set of operating principles and structures.

Integration was seen as the key word.

Ground Rules—

No surprises—as concerns arise get them on the table for discussion and resolution.

Membership-- The committee consists of the Executive Committees of WNWSU (4) and OWSU (5). Each member will have a designated alternate. As much as possible, alternates will attempt to participate in the meetings to keep up on the discussions. We want to avoid needing to start discussions over again, given the tight timeframe for the process.

Quorum-- Meetings will require attendance by over 50% of the members (at least 5), however, there is a strong desire for full attendance so that there can be a meeting of the minds on major decisions.

10/23/14 Meeting notes (continued)**page 2 of 2**

Decision-Making-- Roberts Rules of Order create the formal structure for decision-making, however, there is strong interest in using more of a consensus model as much as possible, where committee members will indicate whether they strongly support the proposal, or are neutral (can live with it), or are strongly opposed. An attempt will be made to get everyone to a place where they "can live with" decisions.

Coordinating Committee-- The consultants will work with the two superintendents and two supervisory union board chairs to keep the process on target.

At the end of each meeting, there will be a list of decisions made and a plan for who will communicate the progress following the meeting.

A decision was made to schedule meetings at times and places that may dovetail with other meetings. Meeting Wizard to be used to schedule the full grouping of meetings.

Other Issues to Attend To

Include in the proposal from the committee to the State Board clarification of actions/decisions which can be made in the Phase I timeline and which must be delayed until the phase II timeline.

Communications

Assure a good website

Have a comprehensive communications plan to engage community members

Assure thorough communications with all boards and board members

Next Meeting

Review of Decisions

Review Schedule and Process

Envision a new and highly productive SU

Establish mission, vision, goals, and values governing a new SU

**MEETING OF SUPERVISORY INTEGRATION COMMITTEE:
ORANGE WINDSOR AND WINDSOR NORTHWEST SUPERVISORY UNIONS**

November 4, 2014

6:30-8:30 PM

Minutes

In Attendance:

Frank Russell, Don Shaw, Carl Groppe, Dave Eddy, Jeff Sherwin, Geo Honigford, Bruce Labs, Joe Spinella, Paul Perkins, Meg Powden, Kathy Galluzo, Rebecca Mattoon, Tim Murphy, Donna Benoit, Deb Matthews

The meeting was called to order at 6 PM by Don Shaw.

Members introduced themselves.

Report given on the Bethel Board: Special Meeting last night including new board member with the Bethel Board. Favorable vote for merging with the Orange-Windsor SU on a 5-0 vote. A Lot of favorable energy for this merger.

Meeting turned over to Steve Dale and Mike Deweese from the VSBA to facilitate further planning related to the creation of a new SU.

Review of process issues and ground rules.

Reviewed two phases of planning process.

Reviewed purpose of Phase 1.

Reviewed agenda (attached)

Notes from November 3 Meeting were handed out by Steve Dale. Other notes were handed out by Supt Labs.

Reviewed decisions from last meeting—especially nature of this coming together—"integration" is the key word.

Reviewed ground rules.

Revisited ground rules for "quorum". **Agreement that must be at least five members present with at least two members from each SU. If there are to be official alternates for each member, those members should be voted on by their boards.**

Discussed the need to put on the table critical issues which could get in the way of a final agreement and document. Three were identified at the previous meeting, as follows:

The need for "clean audits" from both SUs prior to a merger.

11/4/14 SIC Minutes (continued) page 2 of 4

Clear direction from Bethel.

The need to revisit the special ed allocation formula—need to be sure it is equitable.

Was agreed that the Bethel issue is now resolved. Other two to be worked on by Mike Deweese together with administrators.

Paul raised the need to adopt a resolution to meet requirements for the Open Meeting Law so we aren't running afoul of open meeting law. Also emphasized the need to meet notice and minutes requirements. A resolution was adopted to embrace the schedule outlined in the letter from the Superintendents to the community. We will be certain to meet all other requirements.

Johanna will post all agendas.

Discussed how the final document will get approved for submission to the state board. Debated whether the final approval would be done by the Integration Committee or by the two SU Boards.

Agreement:

The January 5 meeting of this group should include all members of both SUs so that the final document can be reviewed with everyone and both SU boards can vote on it, for submission the following day to the state board.

Discussed need to get a draft for all individual boards no later than December 18 so people have time to review. Notice needs to go out to the SU boards for January 5th for a full board meeting. Must have a Quorum of each board for January 5th.

Discussed importance of this process. This is a crucial matter and buy-in is important. It is hard to make good decisions without all of the information. Discussed the impact if a board decides not to go along with final document. It is the 2 SU boards, not the individual boards.

Discussed the fact that a report will need to go to the state regardless of the final votes—laying out the process, the current state of planning, and the full alignment of both boards, or any disagreements. The State Board has the authority to act or not with or without agreement. However, Steve was clear that they would prefer that this be a positive process and that there be agreement on the direction.

Business Office Update

Both boards have agreed to have Donna Benoit take over as Business Manager for both SUs. This arrangement began a week ago and it is busy. Donna is learning and spending a lot of

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time going between the two offices. She indicated that she will have a first draft of all budgets ready

for their boards in November. Will talk to you all. Donna indicated that the staff at WNWSU are fantastic.

Mike Deweese Report

Mike Deweese reported that he has been reading all of the historical documents and has begun working with the superintendents and the central offices and with Vaughn Altemus of the AoE.

Brainstorming Activity

The next hour was spent brainstorming the question:

If you are successful in creating an ideally functioning new Supervisory Union, how would you know it? What would you see happening? What would you experience?

Document to be produced by Steve and Mike to review at the November 10 meeting.

Brainstormed possible underlying values—to be prioritized.

Wrap-Up

Reviewed key agenda items for next week.

- Review and editing of draft documents drawn from the brainstorm.

- Sharing of information on "The High Functioning Supervisory Union"

- Begin planning for how an SU of this size and scope can function effectively and efficiently.

Are there any other issues out there that will need ongoing attention?

The issue of the votes for each town was again raised. Is general agreement that this issue may or may not be appropriate to address at this phase.

Choice was raised-- Is general understanding that the coming together of two SUs does not, by definition, involve changing any current choice situations. This issue will not be addressed as part of this merger. There was agreement that the coming together of the districts could lead to increased choices for students. And there will likely be interest in further discussing the issue at some point, but the SU does not have any authority to alter current arrangements.

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Discussed distribution of grant money?

- Bruce and Meg have had discussion with Alice of Windsor Central. She is seeking dollars that match proportion of ADM from WNWSU that will be moving to WCSU—in the neighborhood of \$16,000. Was extensive discussion about whether that is fair or if it should be based on the percentage of ADM for the entire new SU.
- Bruce and Meg will review the situation, talk with WCSU to try to work out a fair arrangement and will consult with the AOE, and will bring back a recommendation.

Name of New SU can be done by January 5 or you could wait for the implementation phase.

We need someone to do official minutes of actions taken for future meetings. Steve and Mike will catalogue work done in the context of planning.

Meeting adjourned at 8:05 PM.

Minutes recorded by combination of Deb Matthews and Steve Dale.

SUPERVISORY INTEGRATION COMMITTEE

November 10, 2014

6PM-8PM

Whitcomb High School

In Attendance:

Committee Members: Geo Honigford, David Eddy, Jeff Sherwin, Carl Groppe, Don Shaw, Joe Spinella, Paul Perkins, Kathy Galluzo

Superintendents: Bruce Labs, Meg Powden

Others: Frank Russell, Rebecca Mattoon, Chris Mabey, Donna Benoit, Todd Sears

Facilitators: Mike Deweese, Steve Dale

Note taker: Deb Matthews

Meeting called to order at 8:04 by Carl Groppe.

Agreed that committee chair role is shared between two SUs. Carl and Don will chair the meetings held at their respective high schools.

Steve passed out packet and went through it.

Handed out raw material from the brainstorm. Also distributed beige sheet broken into various categories—beginning of a “blueprint document”—a working document

Steve reviewed 6 Categories:

Values: What we care about that should guide what we do and how we do.

Vision: What will be happening for children, families, and communities when we are 100% successful?

Mission: What is the purpose of this SU?

Key Result Areas/ Desired results: In what areas are we looking to achieve specific outcomes? What are our desired outcomes?

Indicators: How would you know the results are being achieved? (Will not obsess over during phase 1).

Strategies: What will be the specific action steps?

Discussed Values:

Began with a list from items generated on November 4. Did prioritization exercise and identified priority values.

Trust*****

Transparency(communication)*****

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Integrity

Respect*****

High Expectations***** (For kids, schools, staff, etc.)

Equal Opportunity

Embracing Change*** (Visionary, courage, safe to take risks, etc.)

Fiscal Responsibility*****

Child-centered*****

Safety

Community*****

Enthusiasm

Collaboration

Inclusive/Divergent Opinions8

Do you want to include the notion of embracing change. Kathy said "It is a given. It has to happen"

Geo: Come into thoughts like that. Schools need to look differently 10 years from now.

Carl: embracing change is a strategy more than a value

Child centered took safety for granted.

Need safety for education to take place

Trust, respect and transparency belong together

Steve will write a definition and try to capture some of the other ones.

Agreed we should use "student centered" as opposed to child centered. Some of our kids are young adults.

Worked on revisions to "Blueprint" on the Beige Sheet:

Vision

Sustainable instead of "cost per student in the middle of the pack"

education focused for the vision: What do we want students to know and experience when they are done.

More than just all students "thriving", Best practices or education- how do we phrase what we want.

Concept of what we want students to know and have to do.

Values can attract folks as well as the mission and offerings of the school.

People come because of the values

Students ready for the career or college when they leave us.

Flexible pathways within our SU to get there.

Global statement of "What does the world look like when you get there"

Don has a thought ready to come out....

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Mission: What is the role of this Supervisory Union? In addition to achieving the vision Change children to students Are the last 3 redundant? Kind of. Some deal with children and some deal with organizational. Comment on both those categories.

What about High Level of community involvement?

Highly efficient organization that "continuously improves itself"

Should we have "to meet the educational needs of our students?"

Should the word "increased" educational opportunities High Expectations: kids and schools and communities

Innovation- Is the concept of Innovation important to incorporate here? Yes innovation is important.

It is going to be more important- communities need to know that we have to innovate to survive.

Desired Results:

What about the categories: we will start drafting into a statement Is there anything missing? Is it a reasonable place to start.

Where are the economies? Under efficiency? Is it the same thing?

Frank is trying to match up to law right now . ie. Act 153 etc.

details of the strategies will be done in Phase 2.

What is the difference between IV- High functioning centralized systems and VI-A highly functional..

IV seems to relate to students- different focus where VI relates to governance and structure- how the SU would operate, not what it would be delivering All speak to a highly functioning system.

Geo thinks IV and VI should be combined

Others think separate focus

Separate to Education vs. Operations

How to move from a list of items to workable narratives.

Are there folks who want to work on some of these?

Steve and Mike would welcome your comments.

Heavy spirit of innovation to make something that doesn't exist in this state.

3-4 SU's this large, but have a heavy sense of history.

You have the opportunity to create something very different. Encourage you to think differently.

Tremendous opportunity to create different things and really creatively.

Steve presented information on "the Effective Supervisory Union"

ROLE OF PRINCIPAL/SUPT/BOARD AND RELATIONSHIP COMMUNITY EXPECTATIONS OF THE ABOVE

Loose Confederation: No interdependence. Connect because have to. 5-6 in this category (example: North Country)

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Business Hub: Almost fee for service relationship. There is a business relationship—we are paying and are getting specific centralized services—financial services, transportation, etc. Are 7-9 in that category. Don't see students as their common focus. No shared mission

Collaborative effort: Boards have come together: shared mission. E.g.-- Rutland Northeast. Run many services centrally for efficiency for the last 25 years. "Freedom and Unity", but maximize things together. Supt is involved in the educational agenda 7-10 districts in this category. Rutland Northeast has a "compact" which outlines their mutual commitments. Every year they recommit in a "compact meeting".

Integrated SU: SU has become a single school district. Randolph- single board once a month. Conduct all of the business of the district and at the end of the meeting then they split into individual boards. Function as a single district. 3 towns. 3 elementary and SU high school and tech center.

Strongly advise 1 set of policies for SU so the Supt. knows what to do. Each board has to sign off on each policy—can make a small change, but not advised very often.

Discussed how to use this going forward. Was suggested that we use the framework of the four categories as a starting point.

We need to look where we are.

OWSU--Executive board has moved from the business model to the collaborative model. We know that the resources are where they are.

How did that shift happen from business to collaboration. Started with sports then expanded to Arts and music and social interactions, and more about what are there for students.

Sharing teachers, foreign language and addition of curriculum coordinator, everybody is concerned about the kids in the SU.

WNWSU: moving towards a collaborative model in fits and starts. State board has made us look at things collaboratively. We were dysfunctional in the business hub.

What is important is what you are going to create.

Curious as with some of your towns not having a physical school then how are they encouraged to participate? How do they buy in and care about all the other schools.

5 years ago is when the village school closed. A lot of students stay in WNWSU. Used to be that Pittsfield kids stayed in WNWSU.

Steve suggested a meeting with Two Rivers at some point during the implementation phase.

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What do we see our SU being. Collaborative effort being as integrated as we can be?

Landing on the ground as collaborative and then to head towards integrated.

10 towns with 26 member board and we must be Collaborative to survive. Steve hears that you want to start Collaborative and work toward Integrated.

Think of it as an enterprise and think of centers of excellence. Different focus areas throughout the SU. What is the desired end state? Is it individual schools doing individual things? Centers of excellence? Focus areas?

Find out why people are leaving the district.

Look at the structures that we talk about going from 1 to the other.

Is this a 5 year or 10 year dream or is the time frame shorter.

Define and state enterprise.

Tie to corporation and college

Relationships with companies and college.

Upper valley business and education partnership. Hanover- Everybody wins program

Went around room and asked each committee member to react to this conversation?

Superintendent- how to use him?

Same discussion that we have had in OWSU.

Get the governor on board for FIBER OPTICS in our area. AT HOME AS WELL AS SCHOOLS

Centers of excellence- Ag or Outward Bound Technology for meetings and communicating

We need to know where to start.

Conceptually on board- remember the educational professionals and they need to design things.

Going to change and don't know what it is going to look like.

Board needs to identify vision, values and priorities.

Collaborative makes a lot of sense and we don't know if the communities are ready for the integrated. Integrated sounds top down and the communities may react. Will our cultures embrace that. Centers for instruction sounds good to me.

Already has started to be a part of our culture. We have already started to do that.

If we design it and not be hung up on tuition or merge to one high school on 4 campuses so that tuition is not a factor.

Steve pointed out that this process will create a platform on which to create a new educational program for the region. Are limitless possibilities. Could choose to create a joint school with multiple locations. limitless opportunities that will be built on the platform.

Reviewed the plan for the next meeting—November 20. Discussed scheduling challenges. Specific time to be set. Will be at Royalton.

Adjourned 8:22 PM

Minutes by Deb Matthews and Steve Dale

SUPERVISORY INTEGRATION COMMITTEE**November 20, 2014****7PM-9PM****South Royalton High School****Minutes****In Attendance:**

Committee Members: Geo Honigford, David Eddy, Jeff Sherwin, Carl Groppe, Karen Henderson attending for Don Shaw, Joe Spinella, Paul Perkins, Kathy Galluzzo, Bruce Hyde,

Superintendents: Bruce Labs, Meg Powden

Others: Frank Russell, Chris Mabey, Todd Sears, Tim Murphy, Barbara Turner, Tammie Ennis, Jessica Schmidt, Christine Hudson, Bridgid Taylor

Facilitators: Mike Deweese, Steve Dale

The meeting was called to order by Carl Groppe at 7:04PM. Introductions were done and the meeting was turned over to the consultants to facilitate continued planning.

Schedule Review:

The remaining meeting schedule was reviewed with meetings scheduled for:

December 4, December 18, and January 5

It was suggested that the December 18 meeting might need to be somewhat longer (to be decided on Dec. 4). It is also critical that all SU board members from both SUs plan to be present on January 5 to vote on the final proposed report to the State Board.

Report on Educational Benefits

Mike Deweese and the two superintendents reported on a preliminary discussion with the combined administrative leadership group related to potential educational benefits of an integrated SU. They reported that there was good energy among the participants and some creative ideas. This will be a central part of the "implementation phase" of this effort. It was raised and agreed that teachers need to be engaged, as well, as we go forward in trying to imagine the potential educational benefits.

Feedback on November 17 Draft of "Blueprint for a New SU"

Extensive input was provided on wording and concepts throughout the draft document. Next steps are for Frank Russell to re-draft the "vision" statement and Steve to redraft

11/20/14 SIC Minutes (continued) page 2 of 2

the remainder of the document to be brought back at the next meeting. A new draft will be circulated a couple of days before the December 4 meeting.

Review of Possible Structures

The next section of the meeting was focused on the following question:

How might the new SU operate to achieve the vision, mission, and desired results (that have been identified for the new SU)?

Everyone was asked to think separately about the questions and to prepare to share ideas. Each individual on the committee shared their best thinking. Others in the audience were also allowed to share thoughts. A wide range of ideas were shared, ranging from meeting times, to meeting configurations, to expanding the use of technology to support meetings, to more significant reorganization and the "ceding of responsibility" to the SU board. The full content of the board is being transposed and will be distributed under separate cover prior to the next meeting. Some participants expressed uneasiness with some of the suggestions.

Steve explained that the purpose of the exercise was to cause people to think seriously about what will be required to successfully achieve the mission of this new entity. The brainstormed list will be the start of the discussion at the next meeting of the Committee. It will be important to find a pathway that can be strongly supported by the committee. At the same time, it will be important not to shy away from the need to think in a fresh way about the new entity.

Bill Daggett

Superintendent Bruce Labs explained that he had reached out to consultant Bill Daggett about coming to the districts on February 10 to work with administrators and boards around envisioning the need to move education forward. No formal motion was made, but there appeared to be general support for moving forward. Several favorable comments were made. A couple of board members expressed neutrality on the matter.

Financial Review

Mike Deweese explained how he and Grant Geisler are moving forward with the financial review which should produce a comparison between the current state (2 SUs in FY15) and the projected, integrated state for FY'17. The information will be presented at the next meeting.

Meeting adjourned by Carl Groppe at 9:17

Minutes Taker: Steve Dale

SUPERVISORY INTEGRATION COMMITTEE

**December 4, 2014
6:30PM-9PM
Whitcomb High School**

Minutes**In Attendance:**

Committee Members: Geo Honigford, David Eddy, Jeff Sherwin, Carl Groppe, Don Shaw, Joe Spinella, Paul Perkins, Kathy Galluzzo, Bruce Hyde

Superintendents: Bruce Labs, Meg Powden

Others: Frank Russell, Todd Sears, Tim Murphy, Tamela Ennis, Deb Matthews

Facilitators: Mike Deweese, Steve Dale

Guest: Grant Geisler

The meeting was called to order by Carl Groppe at 6:36PM.

The minutes for November 10 and November 20 were approved unanimously, with the correction of three names on the November 20 minutes (Tammie Ennis, Barbara Turner, Brigid Taylor)

Grant Geisler was introduced to the group as a person who has done some financial analysis to be presented later.

Scope of this Project

Carl Groppe led off with comments about the need to keep perspective on the scope of this particular project. Brainstorming got far afield last meeting. Need to review where we are and what we are trying to accomplish. Carl read what the mission of this committee is—focused on the merger of two SUs. It is not deciding anything about consolidation of districts or closing of schools. Steve shared a graphic that clarified further. (See attached). The new SU improves the ability to be more flexible around education equity and opportunity and will gain efficiencies. It creates a platform for more dramatic breakthrough initiatives later on if districts so choose.

Steve reviewed agenda for the evening--5 things to achieve:

Revisit the scope of the project.

Early indication of the financial picture. Also assessment challenges.

Review and identify any issues in the "blueprint" document that we have been working on.

Further work on identifying how this entity might operate.

Review of draft letter of the kind that might be sent to the State Board.

12/4/14 SIC Minutes (con't) page 2 of 5

Reviewed rest of process. Mike and Steve will package up all the work done so far and get it out to members around December 15 for discussion on December 18. There is a lot of interest and excitement about what is possible here. Vision of what is best for kids.

Financial Analysis

Mike Deweese introduced this section. The task is to take a preliminary look at potential financial benefits of this work and the potential assessment challenges across districts.

This involves a look 17 months into the future. The Transition Board will need to look more carefully at all of this beginning on 1/21/15. No need to drill down too deep at this point.

Grant Geisler, consultant and current business manager of Chittenden Central Supervisory Union, shared findings from his review. Slides are not going to get into a lot of detail.

Scope of work: Savings, Assessment methodology, Future methodology

Used FY 15 budget as it is to the potential savings, had the unified budget been created this year.

Potential savings could be approximately \$314,000, depending on decisions made by the transition board. Savings would largely be in: staffing, office space and financial management.

Staff savings—\$300,000 is a realistic number

Office Space Savings – approximately \$4200

Financial Management System—approximately \$10,000

Grant then presented the range of challenges and options around establishing assessments for each district. There are a wide range of possibilities which will need to be modeled and considered by the Transition Board.

Questions were asked about details. What made you put in a technology director instead of an Assistant Supt? Grant felt it made sense to put in Technology Director, but made clear that the proposed staffing list was his best read and included some place holders—specific decisions about the staffing and the budget will need to be made by the Transition Board. Grant was asked about the average SU cost per student across Vermont. Because every SU includes different services centrally vs locally, it is very difficult to compare. There is no standard. Steve agreed to explore with AOE. How did your report line up with Norm Andrews? Grant has not looked at what he calculated for savings. Those who had seen Norm's earlier report recalled the potential savings as being very similar.

Discussed methodology for SPED separate from other SU costs. Are Bethel's costs higher? Are somewhat more children, but Grant suggests using method that evens things out to avoid wide fluctuations.

Discussed issues related to equalized pupil count. Grant recommends using equalized pupils without the "hold harmless" factor, but the transition board gets to decide. This committee cannot select new methodology.

12/4/14 SIC Minutes (con't) page 3 of 5

Discussed non-operating districts- 19- in the state all doing it differently. Fairness will be the standard- not "let's dump on the little guy". What will be the fair assessment?

Bottom line is there will be savings and the transition board will need to sort out assessments and how those savings will play out across districts. Transition board will create the 16-17 budget to be presented to Town Meeting in 2016. Then the new SU board will make decisions thereafter.

It was again discussed whether there are any state data around assessments or cost per student or anything that allows a board to compare. Steve will check with the AOE

Grant's powerpoint will be made available to the committee.

Discussion of Next Draft of "Blueprint"

Steve explained that the version handed out was slightly different than the one sent a few days ago. Frank suggested using the word "sustainability" in the mission.

Not intending to wordsmith tonight. Looking for big conceptual issues. Goal is to have a draft report based on what we have finished talking about tonight. Steve and Mike to put it together in a report format. The meeting on the 18th will be to really look at the report closely.

Issues/suggestions:

Achievement Gap disappeared- realistic? no

#5 Technology systems are managed "centrally" rather than "jointly".

Track changes on the report so we are not going over the same stuff.

Added stuff to the front.

Frank sent a draft for a vision statement.

Is this a working document? Yes—is a foundation from which the transition board will build its defining documents and its strategic plan.

Would hope that there are more indicators for community support.

It is a blueprint. Why doesn't it contain more practical information about the transition team.

This will be part of a big report. The big report will include transition team make up etc.

Include all staff and not mention administrators twice.

Next time will be the time to really make final changes.

Discussion of Ideas for Operation of a New and Larger SU

Orange Sheet: Photograph of the white board at South Royalton.

Steve: Let me try to again frame what we want to do in the next 40 minutes.

12/4/14 SIC Minutes (con't) page 4 of 5

Question is : What ideas does this group have for operating this new SU to achieve the objectives on the "blueprint"?

Shared a glimpse of how other boards have chosen to operate. (attachment)

Reviewed how the two current SU boards operate.

WNWSU- SU monthly- 12 board members- EC once a month

OWSU- SU board quarterly-EC every month- Districts meet once a month and some twice a month.

How to operate going from 5-10 boards?

SU board: Education of all children in the region and are there greater efficiencies? Must conduct our business at high level, trusting the employees to do their work.

Overseers: laying out where it is to go and then laying out the policies and letting the folks run the school.

Discussed how to create an intentional structure

What can the EC board do in OWSU? Can make decisions everything except the 3 leadership positions and passing the budget. I don't have a quorum of the full board and there isn't a quorum then the EC can act like that.

Reviewed numbers challenge:

WNWSU- 21 members-Bethel-5, Rochester-5, Hancock-3, Granville -3, Stockbridge-5

OWSU-25 members—Royalton-5, Tunbridge-5, Strafford-5, Sharon-5, Chelsea-5

Many ideas were brainstormed around how to achieve a highly effective board that is large and geographically disbursed and could efficiently use staff and board time. The brainstormed list is attached. The information discussed will inform the overall draft of the report slated to be released on December 15.

Beginning Discussion of Letter to State Board

Draft letter circulated (attached)

Want input on language in letter and most importantly, is there anything you want to request of the State Board as part of their action on January 20 which will support your work. You can always go back and ask for waivers in structure and operations, but is there anything else you want to get on the table now—law, policy, special appropriation or consideration for something?

Ideas proposed:

- construction aid for new construction or renovations
- whatever she thinks she needs to make this transition

12/4/14 SIC Minutes (con't) page 5 of 5

- State support for special audit if needed (Donna?) (Donna is feeling more confident that she is getting a handle on the overall finances and feels that things will "tie out". Does need see immediate cause for concern or action.)
- Consider clarifying that no district deficit will affect the new SU. May not be necessary as this is already true. Was suggestion that any SU deficits would be cleaned up at their respective SU's prior to a merger.
- Key administrators in both SUs were asked to think about the question—are there special considerations that should be proposed as part of this proposal that could support success for the new SU.
- Consider request for Audit Extension
- Discussed whether to include proportional voting within the districts. Steve advised not to try to tackle this in phase 1. Is complicated, should involve lawyers, and would not be agreement at this point. Tackle this issue with the Transition Board.
- We should be asking for special innovation grants, grants which could help us make substantial education changes, curriculum, MTSS, etc.
- Region wide connectivity
- Flexibility around endorsements
- Consider legislation that allows school districts to cede the policy authority to the SU

Communication

Need to make sure we are paying attention to communication.

Is there some other communication piece that needs to happen. Another letter of progress?

Room in annual reports?

Superintendents will draft up another letter to get out to all stakeholders.

Next Steps

Draft report out to both SUs on the 15th (or early the 16th). Should be sent to all board members.

Meeting on the 18th- 2.5 hours- last time to get into substance of what is in the report.

18th of Dec to 30th of Dec, if is major error or something we overlooked, then talk to the SU board chair in your region and Don and Carl will communicate it to Steve/Mike.

Jan 5th- we need a quorum of both SU's for final approval of the plan.

NEXT MEETING AT SOUTH ROYALTON, DECEMBER 18 AT 7:00pm

Meeting adjourned at 9:04PM.

SUPERVISORY INTEGRATION COMMITTEE

**December 18, 2014
7:00-9:30 PM
Sharon Elementary School**

Minutes**In Attendance:**

Committee Members: Geo Honigford, David Eddy, Jeff Sherwin, Carl Groppe, Don Shaw, Joe Spinella, Paul Perkins, Kathy Galluzzo, Bruce Hyde

Superintendents: Bruce Labs, Meg Powden

Others: Frank Russell, Todd Sears, Tim Murphy, Tamela Ennis, Tara Weatherell, Liz York

Facilitators: Mike Deweese, Steve Dale

The meeting was called to order by Don Shaw at 7:06PM.

Following introduction, the minutes of the December 4 meeting were unanimously approved as submitted.

The process for completing and submitting the report was reviewed.

Tonight-- review the full document.

By early next week, distribute and post the next draft.

Any recommended changes get submitted to Carl or Don. They will forward them to Mike and Steve.

Final version to be distributed on December 31.

Vote on January 5. ***WE NEED A QUORUM FROM EACH OF THE SUPERVISORY UNIONS TO BE PRESENT AT THAT MEETING, TO BE HELD AT WHITCOMB HIGH SCHOOL AT 6:30 PM.***

Review of Draft Report

The group went through each section of the report and made many suggestions which will be worked into the next draft.

There was agreement to change the outside date for convening the new Transition Board to March 31, 2015, although there was agreement that members should be named as soon as possible so the group can get underway sooner if possible.

The group discussed the make-up of the Transition Board. The Transition Board will look similar to a supervisory union board with 3 reps from operating boards and 1 rep from non-operating. Frequency of meetings and the design of committees and other organizational details will be decided by the Transition Board.

Review of Draft Letter to State Board

Reviewed the draft letter and made a number of changes. Need to be sure language in letter matches the "state support" section of the report, itself. Discussed need to have recommendations to the state board be prioritized. Also discussed the fact that the State Board has limited authority and what we are seeking in most instances is their support with others.

Wrap Up

The plan for presenting to the State Board was deferred to January 5.
Re-reviewed procedures for finalizing the report.

Financial Agreement between Two SUs

The group discussed the split of grant dollars between Windsor Central and the new SU.
Bruce

and Meg will continue to try to develop a proposal that can be agreed to by both groups. The default will be to move the decision to the Agency of Education.

The meeting was adjourned at 9:25PM.

SUPERVISORY INTEGRATION COMMITTEE**January 5, 2015****6:30-9:00 PM****Whitcomb High School
Bethel****Minutes****In Attendance:**

Committee Members: Geo Honigford (Royalton), David Eddy (Bethel), Jeff Sherwin (Rochester), Carl Groppe (Stockbridge), Don Shaw (Sharon), Joe Spinella (Chelsea), Paul Perkins (Strafford), Kathy Galluzzo (Tunbridge), Bruce Hyde (Granville)

Superintendents: Bruce Labs, Meg Powden

Others Board Members: Dan Perera (Hancock), Karen Henderson (Sharon), Christine Hudson (Royalton), Chris Mabey (Royalton), Rebecca Mattor (Chelsea), Frank Russell (Rochester), Todd Sears (Bethel), Tim Murphy (Royalton), Tamela Ennis (Bethel), Tara Weatherell (Chelsea), Liz York (Tunbridge), Amy Frost (Tunbridge), Ray Rice (Pittsfield), Laurie Smith (Royalton), Tim Brennan (Bethel), Kristin LaFromborsi (Bethel), Tara Weatherell (Chelsea), Amy Wilst (Rochester), Hilary Linehan (Strafford)

Staff: Carrie McDonnell, Cynthia powers, Donna Benoit, Barnett Williams, Deb Matthews

Facilitators: Mike Deweese, Steve Dale

The meeting was called to order by Carl Groppe at 6:34 PM.

All in attendance introduced themselves.

Minutes from December 18 were approved unanimously.

Agenda was reviewed.

Overview of the Committee Process

Using a powerpoint (attached), Carl Groppe, Don Shaw, Bruce Labs, Meg Powden, Steve Dale, and Mike Deweese reviewed the work of the committee.

Context

Phase 1 vs Phase 2

Values, Vision, and Expected Results

Description of educational benefits

Description of financial benefits

Ideas for operating a larger SU

Transition Board

Request for state support

Steve Dale reviewed changes to the December 20 version of the report that have been drafted:

- Change reference to Tunbridge as a PK-8 school to K-8 school
- Redrafting of cover letter
- Addition of December 18 Minutes

Public Comment and Board Discussion

The floor was opened for general discussion, questions, comments, suggested changes by anyone in attendance.

Extensive discussion of recommendations for state support. Agreed that there should be clear examples available for each to illustrate the issue, but not box us in. Group wants to add "technology infrastructure" and "assistance with transportation" challenges to the list. Geographic isolation is a challenge.

Agreed there are 6 changes needed in report

p. 12 change term student-centered to "student centerdness"

p. 2 change "has" to "have"

Include report from two superintendents as an Appendix D

Add minutes from 1/5/14 Meeting

Add "technical infrastructure" to the list of state requests for assistance

Add a request for assistance relative to transportation—especially related to financial help for transport of students between programs or locations and assistance with the overall transportation system that will help parents attend events and support their children's programs in this expanded geographic area.

Vote to Approve the Report

A motion was made by Geo Honigford to approve the report developed by the Committee. The motion was seconded by Bruce Hyde. The vote for approval of the report, as modified, was unanimous.

Preparations for January 20

Bruce Lab's discussed plans for the state board meeting to be held at the South Royalton High School. 20 people indicated that they expect to attend.

The presentation will likely be done by Carl and Don. Carl invited others who would like to speak to let him know.

Communication to the Broader Community

Bruce and Meg will develop a paragraph which should be included in each town meeting report. They will also develop

Next Steps and Final Thoughts

Don and Carl are very grateful for the hard work and time that has been put into it. Next committee to have Mike and Steve involved and are they open to it. Steve wanted to say that you have an extraordinary group across the board. Never been in a structure where everyone came to every meeting and exceptional in energy and commitment. Happy to support you in any way.

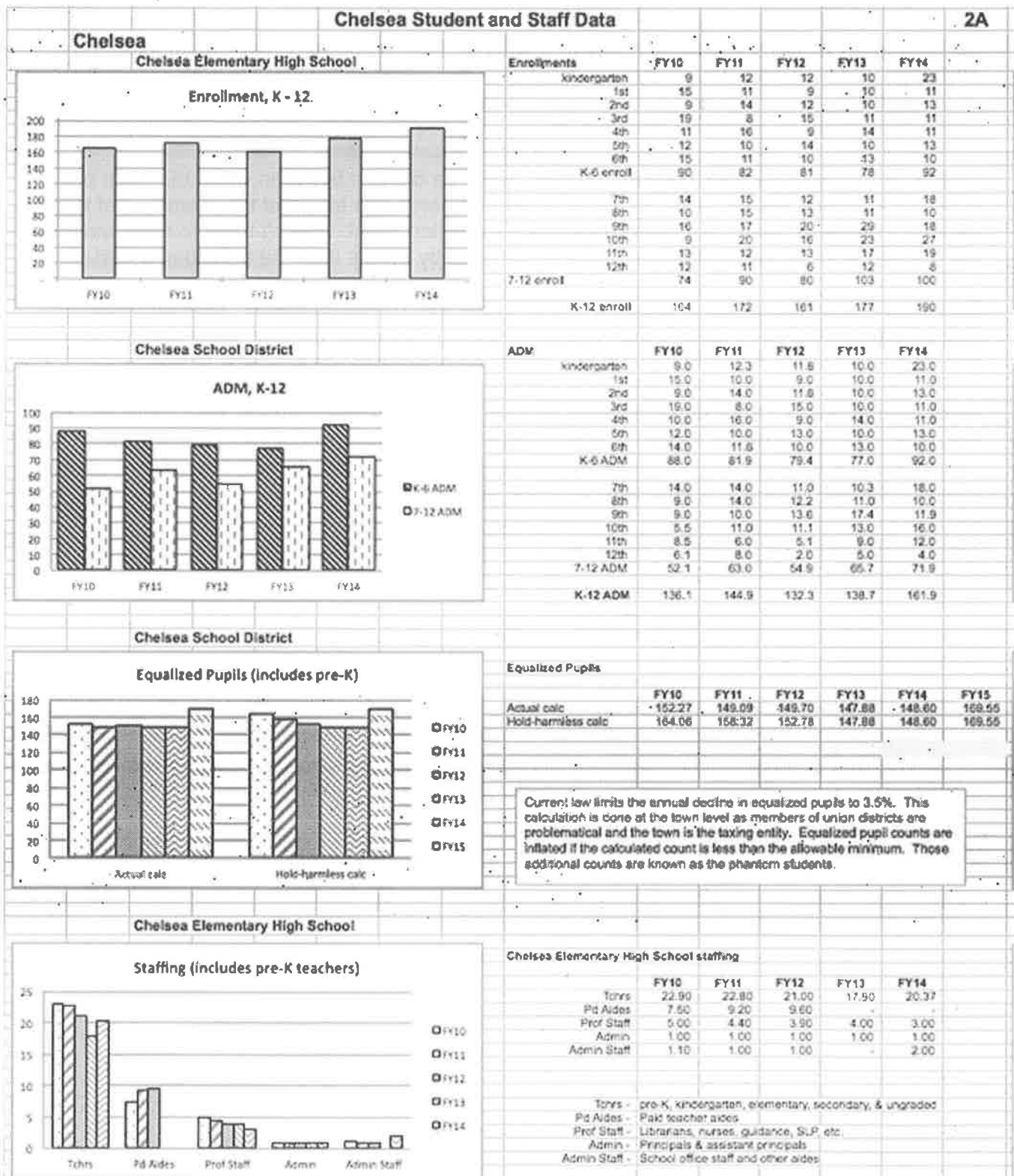
Don gave a round of applause for everyone.

Extensive discussion about Transition Board. Must be created between when the state board acts (1/20/15) and March 31, 2015. Each of the 10 boards has to select the members of this board. Transition Board can revisit structure. Transition Board doesn't have to meet monthly, but may do work by subcommittees and can be done by others than the transition board.

Extensive discussion about how and when to create the Transition Board. Was agreement that boards should try to identify their members during February, but that some may have a challenge with board members going off. Transition board has the authority to spend the money so the sooner the board is together the better. Meg and Bruce will come up with a list of tasks for that board. Don's understanding that once the state board makes their decision, we will have a transition board meeting. Steve hears a lot of energy about let's keep it going. You can create one as soon as you have everyone appointed. If all the boards have 3 or 1 person before 2/20 then schedule it and have your first meeting.

The Meeting was adjourned at 8:20PM.

Appendix B: AoE Student and Staff Data

OWSU: Chelsea
AoE Student and Staff Data

OWSU: Royalton AOE Student and Staff Data



OWSU: Sharon AoE Student and Staff Data

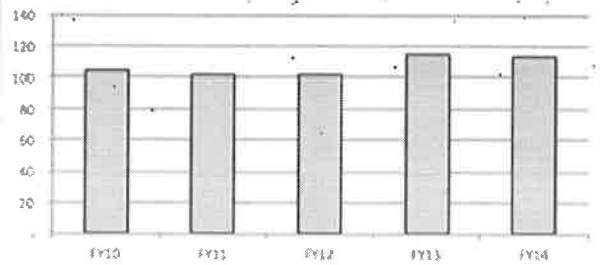
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Sharon

Sharon Student and Staff Data

Sharon Elementary School

Enrollment, K - 6

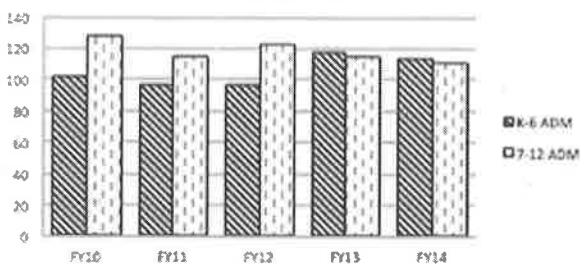


Enrollments

	FY10	FY11	FY12	FY13	FY14
Kindergarten	25	13	15	14	15
1st	9	21	18	14	15
2nd	13	13	18	19	14
3rd	14	11	12	23	20
4th	10	13	13	13	22
5th	15	13	15	16	14
6th	18	18	11	18	13
K-6 enroll	104	102	102	115	113
7th	-	-	-	-	-
8th	-	-	-	-	-
9th	-	-	-	-	-
10th	-	-	-	-	-
11th	-	-	-	-	-
12th	-	-	-	-	-
7-12 enroll	-	-	-	-	-
K-12 enroll	104	102	102	115	113

Sharon School District

ADM, K-12

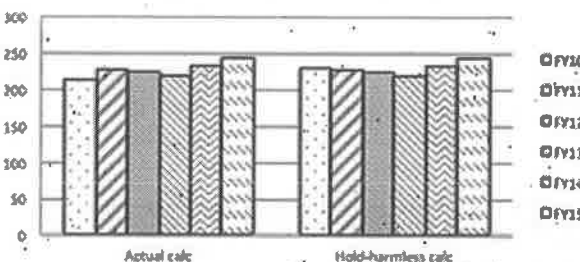


ADM

	FY10	FY11	FY12	FY13	FY14
Kindergarten	25.0	9.1	10.1	15.0	14.0
1st	8.0	21.0	18.0	14.0	16.0
2nd	13.0	13.0	18.0	19.0	14.0
3rd	14.0	11.0	12.0	22.8	20.0
4th	10.0	13.0	13.0	13.0	22.0
5th	15.0	13.0	15.0	16.0	15.0
6th	17.0	17.0	11.0	17.7	13.0
K-6 ADM	102.0	97.1	97.1	117.5	114.0
7th	14.0	21.2	18.0	15.0	17.0
8th	25.8	13.0	23.0	19.0	13.0
9th	18.0	21.1	15.0	22.0	19.3
10th	24.0	19.1	21.0	19.0	24.1
11th	20.0	25.0	19.7	21.0	19.0
12th	25.6	15.6	20.3	19.0	19.0
7-12 ADM	127.4	115.0	122.0	115.0	111.4
K-12 ADM	228.4	211.8	218.3	232.5	225.4

Sharon School District

Equalized Pupils (Includes pre-K)



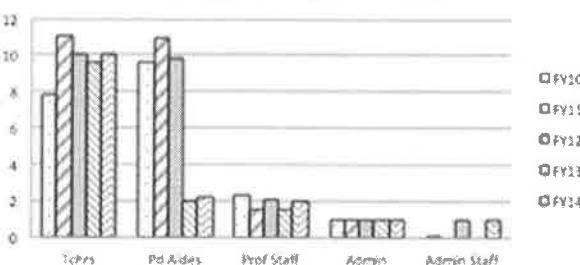
Equalized Pupils

	FY10	FY11	FY12	FY13	FY14	FY15
Actual calc	213.78	227.39	223.15	219.49	233.41	243.79
Hold-harmless calc	229.16	227.39	223.15	219.49	233.41	243.79

Current law limits the annual decline in equalized pupils to 3.5%. This calculation is done at the town level as members of union districts are problematical and the town is the taxing entity. Equalized pupil counts are inflated if the calculated count is less than the allowable minimum. Those additional counts are known as the phantom students.

Sharon Elementary School

Staffing (includes pre-K teachers)

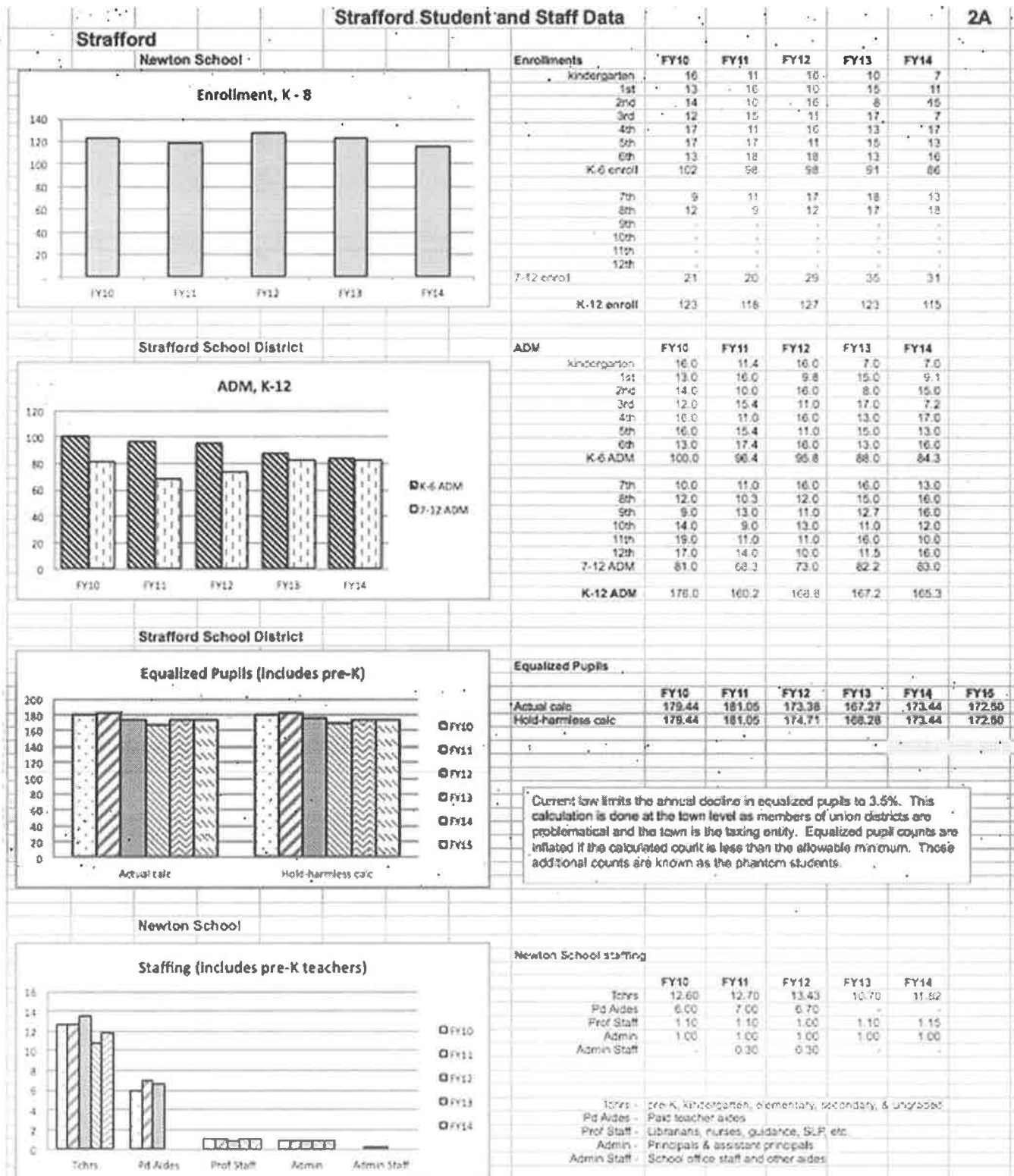


Sharon Elementary School staffing

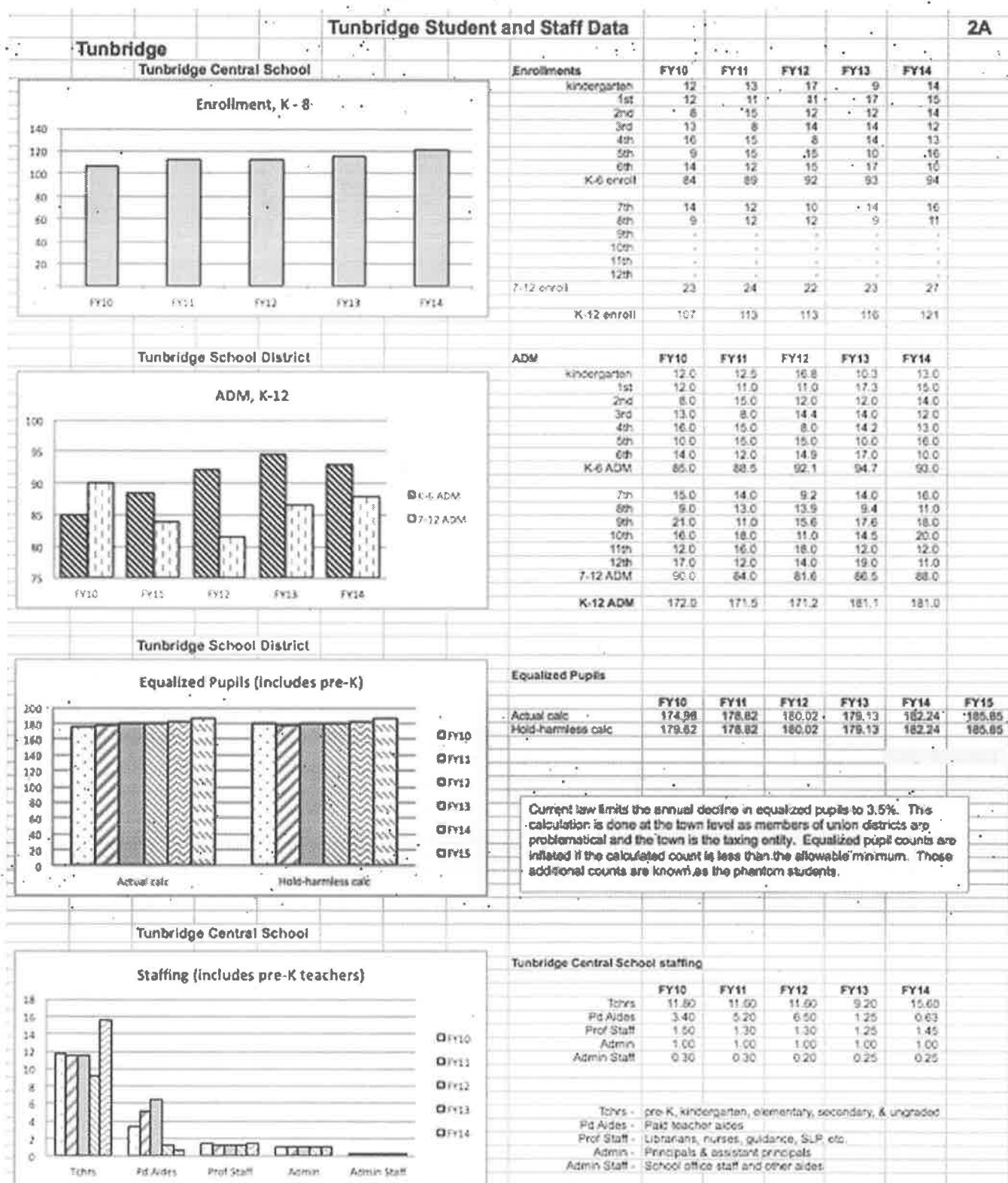
	FY10	FY11	FY12	FY13	FY14
Tchrs	7.80	11.10	10.10	9.60	10.10
Pd Aides	9.60	10.90	9.80	2.00	2.27
Prof Staff	2.30	1.50	2.10	1.60	2.01
Admin	1.00	1.00	1.00	1.00	1.00
Admin Staff	0.10	-	1.00	-	-

Tchrs - pre-K, kindergarten, elementary, secondary, & ungraded
Pd Aides - Paid teacher aides
Prof Staff - Librarians, nurses, guidance, SLP, etc.
Admin - Principals & assistant principals
Admin Staff - School office staff and other aides

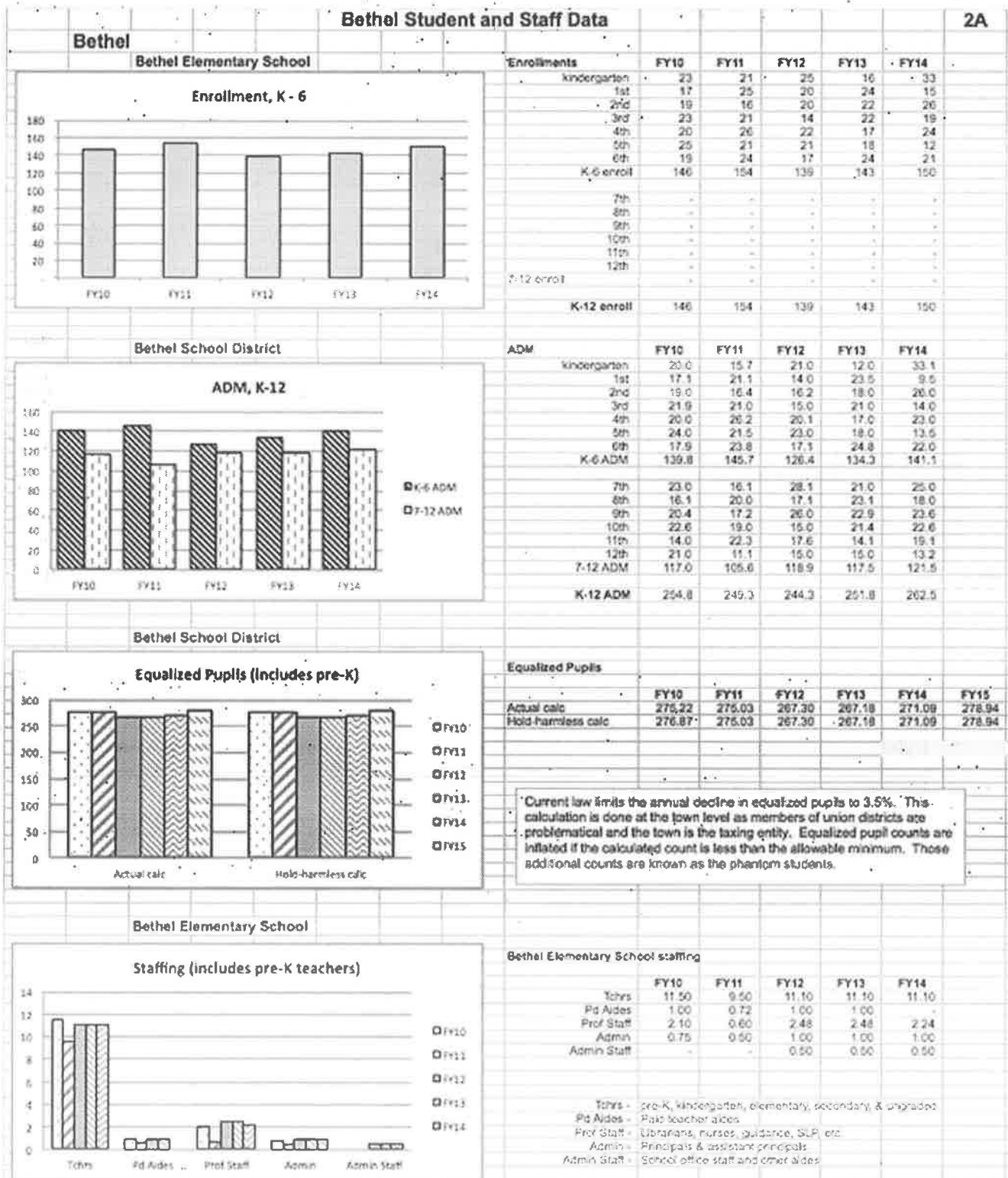
OWSU: Strafford AoE Student and Staff Data



OWSU: Tunbridge AoE Student and Staff Data



WNWSU: Bethel AoE Student and Staff Data



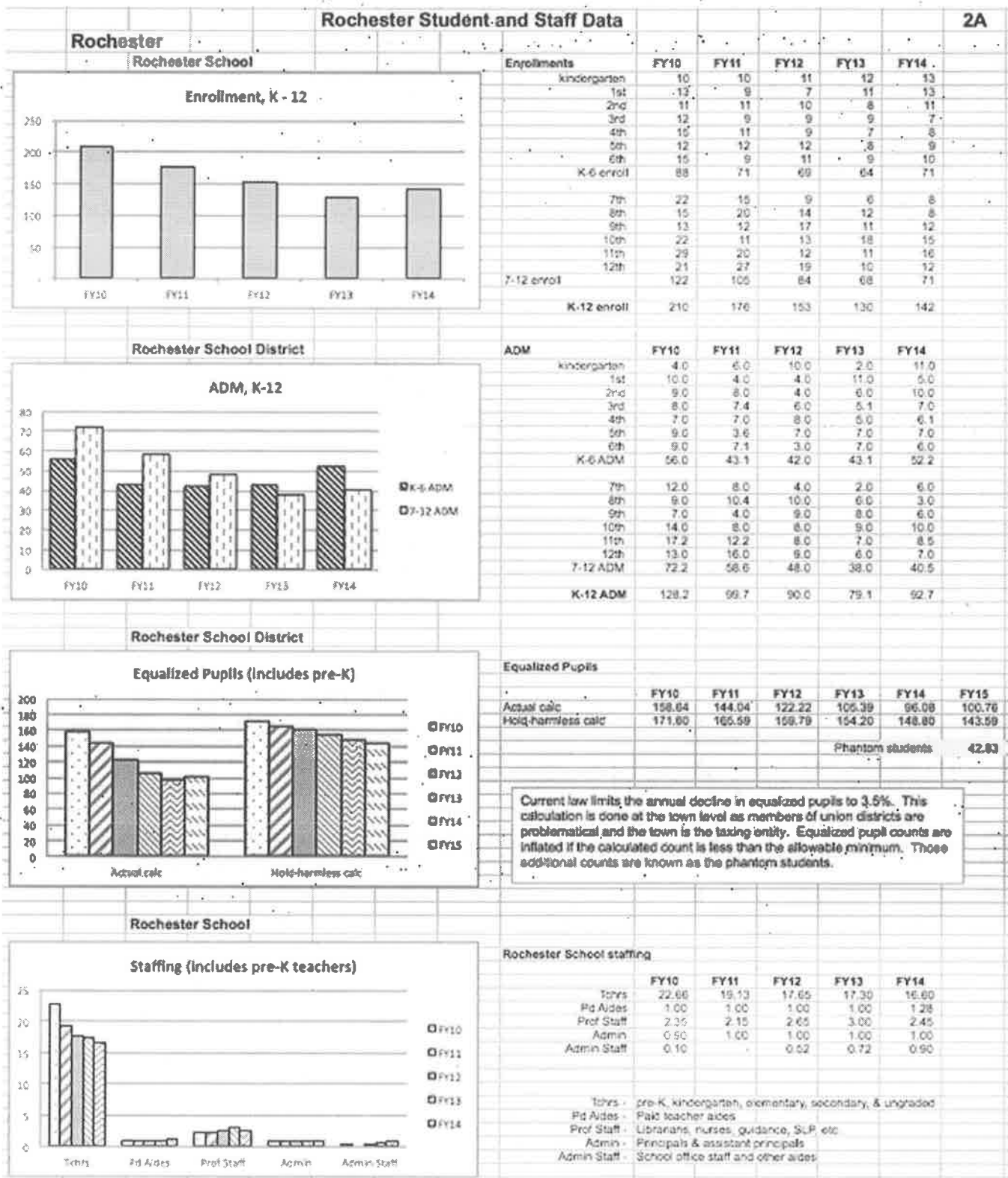
WNWSU: Granville AoE Student and Staff Data

Granville					Granville Student and Staff Data						2A
No school operated					Enrollments	FY10	FY11	FY12	FY13	FY14	
N/A					kindergarten						
					1st						
					2nd						
					3rd						
					4th						
					5th						
					6th						
					K-6 enroll						
					7th						
					8th						
					9th						
					10th						
					11th						
					12th						
					7-12 enroll						
					K-12 enroll						
Granville School District					ADM	FY10	FY11	FY12	FY13	FY14	
ADM, K-12					kindergarten	5.0		1.9	1.0	3.0	
					1st	1.0	6.0	1.0	2.0		
					2nd		1.0	7.0	1.0	2.0	
					3rd	4.0		1.0	5.0	2.0	
					4th	2.0	4.0	1.0	1.0	4.0	
					5th	1.0	3.0	4.0	1.0	1.0	
					6th	1.0	1.0	3.0	2.0	2.0	
					K-6 ADM	14.0	15.0	18.9	13.0	14.0	
					7th	5.0	1.0	1.0	3.0	2.0	
					8th	1.0	5.0	1.0	1.0	2.0	
					9th		1.0	4.0	1.0	2.0	
					10th	5.0		1.0	3.0		
					11th	5.0	4.0		1.0	3.0	
					12th	5.0	4.0	4.0			
					7-12 ADM	23.0	15.0	11.0	8.0	9.0	
					K-12 ADM	37.0	30.0	29.9	22.0	23.0	
Granville School District					Equalized Pupils	FY10	FY11	FY12	FY13	FY14	FY15
Equalized Pupils (includes pre-K)					Actual calc	44.82	41.06	36.00	31.75	28.87	25.48
					Hold-harmless calc	54.16	52.26	50.43	48.66	46.96	45.32
									Phantom students		19.76
					Current law limits the annual decline in equalized pupils to 3.5%. This calculation is done at the town-level as members of union districts are problematical and the town is the taxing entity. Equalized pupil counts are inflated if the calculated count is less than the allowable minimum. These additional counts are known as the phantom students.						
No school operated					No school operated staffing	FY10	FY11	FY12	FY13	FY14	
Staffing (includes pre-K teachers)					Tchrs						
					Pd Aides						
					Prof Staff						
					Admin						
					Admin Staff						
					Tchrs - pre-K, kindergarten, elementary, secondary, & ungraded						
					Pd Aides - Paid teacher aides						
					Prof Staff - Librarians, nurses, guidance, SLP, etc.						
					Admin - Principals & assistant principals						
					Admin Staff - School office staff and other aides						

WNWSU: Hancock AoE Student and Staff Data



WNWSU: Rochester AoE Student and Staff Data



WNWSU: Stockbridge AoE Student and Staff Data



Appendix C: Governance Operating/Structural Ideas

On December 4, 2014, the SIC brainstormed ideas for achieving a high functioning supervisory union which would support achievement of our mutual vision and support attracting and retaining high-quality leadership. Below is the full list of ideas generated in that discussion. They are included because of the critical need to find effective operational and meeting strategies for such a large entity.

Operating/Structural Brainstormed Ideas from December 4 Meeting of SIC

- Kathy likes the Carousel model
- Two choices- hire an assistant superintendent for meetings. These monthly meetings really develop trust. Still would have to have regular board meeting If you found the executive council worked well; Geo thinks it has worked well. Never have trouble getting a quorum
- End result might want to be - transition board would have to look at where they want to be. Start monthly- Can't eliminate the monthly meeting.
- Do we need a superintendent at all the meetings.
- Donna is already experiencing the juggle of the 2 boards.
- Something has to change
- We have to be at certain times.
- videoconferencing ability - public can interact More than one carousel meeting a month
- 3 carousel meetings a month
- talking to everybody at the meeting
- Basic things meetings are for is communication. Lot of information could have been in a memo or in a report sent out before a meeting. It is not efficient to have someone read at a meeting.
- Certain portions could be handed out.
- Supervisory union doesn't have to meet that much.
- I like the carousel
- Redefining what a district board does.

Operating/Structural Brainstorm Ideas from December 4 Meeting of SIC (page 2 of 3)

- The supervisory union board represents the respective town.
- Communication Supervisory Union Board- Roles and meeting purpose.
- Perspective from Superintendent- I don't want to miss meetings.
- I want to clear up questions.
- luxury of having meetings and not having me there is more of a problem and a bigger mess to clean up. I would like to have less meetings, but the work sometimes changes in a harmless meeting.
- Bruce would be uncomfortable if you were meeting alone.
- Does the carousel work for you?
- People around this table that they will lose the local supervision.
- Donna is not comfortable submitting a report and not being there.
- Setting up technology.
- Participation- by a video link
- great ideas here.
- Public being linked in- great idea- less confrontational format.
- Carousel meetings- set up a video link- short involvement
- 10 local school districts
- 1 SU; 26 board members on the supervisory union board; 14 board members not serving on the board Rules for EC and how big supervisory union wide committees that encourage the 14 members that are not on the supervisory union board local independent work for the board.
- contemplate the idea of a model of the EC running the (governance work) "day to day." Frees up board members time to go to another meeting.
- Governance team- helps to include all members We all tend to champion certain things and self select our talents zero committees- a lot of ad hoc meetings very exciting- variety of angles how do you stay connected to the public?
- How do they have access?

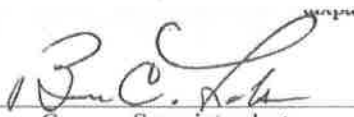
Operating/Structural Brainstorm Ideas from December 4 Meeting of SIC (page 3 of 3)

- A way for people to connect.
- Boards meet every month or twice a month and supervisory union meets less.
- Quarterly meetings for the local board for community interaction and more supervisory union meetings.
- Superintendent doesn't have more than 6 meetings a month and Donna and Deb have more.
- without a target you can't hit it.
- 3 target: administrative time, face to face to the community.
- Strong consideration to a policy governance model.
- better governance structure.
- transition team will make the decision on policy governance.
- Would there need to be legislative changes so that we could do the electronic meeting.
- Has to be one place.
- One or more physical locations.
- Policy governance at the local district level.
- A Lot of what goes on could keep the community linked.
- Policy governance could strengthen the participation.
- EC committee level is efficient and then we don't go into the weeds.
- Don't talk about the minutia.
- What are we achieving and are we structured to achieve it?
- Formalized calendar
- Transition phase for 1.5 years. No reason that these models can't be tried out with different entities.

Appendix D: Joint Letter From Current Superintendents**POSSIBLE ADVANTAGES OF JOINING SU'S TOGETHER**

1. There is strength in numbers and we think there will be strength if we concentrate on developing expanded programming for all our students if joined together.
 - a. We truly need to do the best we can do for each of the students we serve.
 - b. Increased numbers of students allow us to create more opportunities for better curriculum offerings for diverse and discrete populations that are currently too small otherwise serve well.
2. We believe that it is more efficient to negotiate contracts with the teachers regionally and not locally.
 - a. We are aware that the cost of maintaining a quality teaching staff is the number one factor in driving the cost of education.
 - b. We have tried to gain a regional approach to negotiations at OWSU and we are in the last phase of completing a unified contract.
 - c. WNWSU already has a unified contract.
3. We are all feeling the rising cost of education.
 - a. We believe that a collaborative approach to purchasing and funding can be applied to use our increased size to our advantage.
 - b. We believe we can share technology, special education, curriculum, transportation services and food services to serve our region better.
4. Consolidation of Central Office functions will build a more efficient and effective leadership model.
5. We think there is a chance to share faculty and staff between buildings if we are together and the current SU boundaries are erased.

In short, we believe that we will be able to deliver an enhanced education for our students and do it at a lower cost for our taxpayers.


C Superintendent

1-6-2015


Meg Alison Powden,



White River Valley Supervisory Union

461 Waterman Road

Royalton, VT 05068



WRVSU Strategic Plan

Blueprint for Change

2016-2021

White River Valley Supervisory Union (WRVSU)

Strategic Plan 2016-2021

Vision

In the White River Valley Supervisory Union, a world-class education is built upon strong relationships between and among students, teachers, families, and communities. All students are supported, challenged, and engaged with a personalized education. Learning is rigorous and relevant to student interests while preparing every child for college, career, and active citizenship.

Mission

The White River Valley Supervisory Union serves our educational community with special emphasis on optimizing Quality, Opportunity, Equity, and Efficiency. Our school system promotes cognitive, personal and social excellence as students flourish in a dynamic learning environment. We seek to empower each student to become a passionate, lifelong learner and an informed contributor to a rapidly changing society.

Introduction

On January 20, 2015, the Vermont State School Board met to consider a boundary adjustment for the Windsor Northwest Supervisory Union (WNWSU) and to consider a merger with their neighbor SU the Orange Windsor Supervisory Union (OWSU). Over a period of years, WNWSU had issues of declining enrollment, fiscal issues within some member districts, resignation of a superintendent, installation of an interim superintendent, and an inability to recruit stable fiscal management leadership. During this time, there had been many conversations with neighboring districts around alternative governance opportunities. Because of all this continuing instability, it became clear that the status quo could not be maintained and changes to Windsor Northwest SU had to happen.

In June of 2014, Secretary Rebecca Holcombe recommended that the State Board direct WNWSU and the OWSU to undertake a study to consider the advantages and costs of various forms of governance that would provide improved educational opportunities for students as well as increased efficiencies for all residents. That same month, two new Superintendents were hired to lead each SU. During the interviewing process, it became obvious that the Orange Windsor Supervisory Union needed to develop a Strategic Plan to target weaknesses and orchestrate a school improvement effort. However because of the uncertainty around a possible merger, it was clear that any decision about beginning strategic planning efforts would be delayed.

Beginning in October of 2014, staff members in the Windsor Northwest SU and Orange Windsor SU began talks to see if they could work towards consolidation. Both SUs asked the Agency of Education to approve a state grant so that they could hire a consultant to study the merger of both SUs. After four months of meetings with members of both SUs, both Supervisory Boards voted on January 5, 2015, to approve a phase one study report to be presented to the Vermont State School Board for approval at their next scheduled meeting. On January 20th, the State Board approved the plan to integrate the two SUs with the official merger effective date of July 1, 2016.

The concept of developing a Strategic Plan for the OWSU was first discussed when the new superintendent was hired in June 1, 2014. The idea was to develop the plan with input and buy-in from each Board, each School Staff, and the five-town Community. However, early in the summer of 2014, it began to become clear that the idea of the neighboring WNWSU joining Orange Windsor was becoming more compelling and that this union, which had been much debated and speculated upon at both the local and state levels, and especially within the region, had a chance of finally becoming a reality in some form, it seemed that developing a strategic plan would be a good first step in building a blueprint for the entire newly combined SU. Monies for this project were applied for and granted from the state from Act 153 funds. In March of 2015, the combined Boards applied for the money for consolidation and hired the International Center for Educational Leadership to help build a five-year plan.

The plan now was to gather information and opinions from all aspects this new ten school district community. A name for this new SU was selected in October 2015. The new White River Valley Supervisory Union would bring together the towns of Bethel, Chelsea, Granville, Hancock, Rochester, Royalton, Sharon, Stockbridge, Strafford and Tunbridge into one entity. At the same time, the plan was to centralize systems, where there was agreement, to improve quality and efficiency of operation, and comply with many of the mandates of Act 153.

It has been clear that the task of developing the strategic plan was key to the formation of a larger more efficiently run SU. The most important outcome of all of this work will be to raise student achievement in all schools across this newly configured body. Through research on school reform, we know that there are essential elements necessary within the role of a district to raise student achievement. These essential elements needed are as follows:

- 1) There must be clear and rigorous (college- workforce- ready) curriculum standards;
- 2) There must be comprehensive human-capital strategies;
- 3) All instructional practices must be research-based and must focus on high quality student work;
- 4) The supervisory union should have comprehensive performance management and accountability systems;
- 5) There must be positive stakeholder relationships between boards, unions, parents, communities;
- 6) There must be a culture developed of trust, high expectations and transparency.

References

State of Vermont Act 153, art. Act 153 § Sections 1-8 (2010).

Zavadsky, H. (2013, April 5, 2013). Scaling turnaround: A district-improvement approach [Journal Article].

American Enterprise Institute, 1-18. Retrieved from

<http://www.aei.org/publication/scaling-turnaround-district-improvement-approach/>

Chronology of the Development of the Strategic Plan

Consultant meetings: International Center for Leadership in Education Winter/Spring of 2015

Dr. Bill Daggett talk to Boards

Dr. Angela Faherty, lead consultant work with SU Administrators and Teachers

The Daggett System for Effective Instruction: book study for Administrators 2015

*Model School Conference Attendance for School Teams Summer 2015

26 teachers and administrators across the SU

Input to Process:

Faculty Input 8.15

We Surveys:

Community

We Learn/We Teach: Students/Teachers gr 6-12

Community Forum 10.15

Student Congress (*What's on the Mind of a WRVSU Student?*) 70 High School Students 10.15

Strategic Plan Work.2015-2016

Administrator Retreat with Dr. Faherty: How to develop a mission, vision, and strategic plan 2015-16

Administration: Bruce Labs, Superintendent OWSU; Donna Benoit, Business Manager; Deb Matthews, Director of Special Services; Dr. Shirley Ferguson, Director of Curriculum, Instruction, and Assessment; Cynthia Powers, Grant Coordinator, Carrie McDonnell, After School Coordinator, Bill Bonsignore, Lead After School Site Coordinator, Greg Bagnato, Principal Newton School; Barrett Williams, Principal of Sharon Elementary School; Dean Stearns, Principal of South Royalton School; Scott Farnsworth, Principal Tunbridge School; Mark Blount, Principal of Chelsea School; Meg Powden, Superintendent WNW; Cathy Knight, Principal Rochester School, Dr. Barbara Woods, Principal Stockbridge School; Owen Bradley and Andra Bowen, Principal and Assistant Principal Bethel School; Daniella Stamm, Principal Rochester School

Teachers: All teachers of the 2 Supervisory Unions, 2015-present

OWSU/WNWSU Transition Committees: Communication Committee, Education Delivery Committee, Full Board Reviews and Acceptance of the Plan

White River Valley Strategic Plan 2016-2021

Goal 1	Quality	The WRVSVU will offer a world-class education to every student
Objective 1.1	Require excellence in instruction; support it through use of best practices, robust evaluation systems, and a dynamic professional development program.	
Action 1.1.1		Identify and index evidence-based teaching practices at all schools in the SU.
Action 1.1.2		Provide instructional best practice support for teachers and administrators.
Action 1.1.3		Develop SU-wide mentoring program.
Action 1.1.4		Emphasize instructional leadership and allocate resources to support effective instructional practices for all students.
Action 1.1.5		Develop a SU-wide teacher recruitment process.
Action 1.1.6		Create and implement teacher and administrator professional development and retention program to ensure that all Goals and Objectives of the Strategic Plan are met.
Action 1.1.7		Develop a culture of regular teacher collaboration.
Objective 1.2	Use rigorous and evidence-based curricula throughout the SU.	
Action 1.2.1		Develop SU and school-based curriculum teams to research, analyze and develop, relevant, rigorous, and evidence-based curriculum.
Action 1.2.2		Provide resources and technical support for curriculum implementation.
Action 1.2.3		Align and map curricula with State and National standards across all grade levels.

White River Valley Strategic Plan 2016-2021

Action 1.2.4		Implement Professional Learning Communities.
Objective 1.3	Offer relevant, engaging, collaborative, hands on, and real-world learning experiences to every student.	
Action 1.3.1		Provide experiential learning opportunities for all students, across the curriculum.
Action 1.3.2		Develop a structure for planning, budgeting, and evaluating learning experiences.
Objective 1.4	Embed technology in every aspect of students' school experience to broaden and deepen learning.	
Action 1.4.1		Institute an SU level Digital Learning Committee
Action 1.4.2		Develop and implement a Digital Learning Plan to support instruction.
Objective 1.5	Develop an evidence-based multi-tiered system that will support positive behavior at every school in the WRV/SU.	
Action 1.5.1		Provide social, emotional, and behavior supports and resources across all grade levels.
Action 1.5.2		Institute a SU-wide behavioral assessment team.
Action 1.5.3		Identify specific behavior data points to track across schools.
Action 1.5.4		Identify and implement best practices and environment to support students with a variety of behavioral needs.
Objective 1.6	Develop and use standardized data points to track, monitor improvement of school performance, and student outcomes across a variety of domains.	
Action 1.6.1		Develop efficiencies in utilizing student information systems.

Board Approved July 25, 2016

White River Valley Strategic Plan 2016-2021

Action 1.6.2	Implement SU Improvement Team to monitor strategic plan progress.
Action 1.6.3	Develop and implement school based school improvement teams.
Action 1.6.4	Identify assessment practices that support PLP's, PBGR, and EQS.
Action 1.6.5	Research quality data best practices and develop SU-wide data points which can be measured each year to monitor progress over time.

Board Approved July 25, 2016

White River Valley Strategic Plan 2016-2021

Goal 2	Opportunity	The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.
Objective 2.1	Develop Personal Learning Plans with every student and family to assure that each child can achieve high levels of learning, in different learning modalities and while aligned with his or her interests.	
Action 2.1.1		Structure systems to ensure access to all aspects of PLPs.
Action 2.1.2		Develop individual mechanisms to ensure access to all aspects of PLP
Action 2.1.3		Develop classrooms and practical environmental curricula.
Action 2.1.4		Develop and implement Proficiency Based Graduation Requirements.
Action 2.1.5		Provide access to more grade level classmates, courses, visual and performing arts, athletics, internships, co-curricular activities, career preparation, advanced coursework, early college experiences, and after school and summer school opportunities.
Action 2.1.6		Develop SU-wide college visitation program for 100% of student population, by the end of tenth grade.
Action 2.1.7		Eliminate the constraints of a 4 year graduation timeline.
Objective 2.2	Structure and support elementary schools to ensure that all students' performance targets are met.	
Action 2.2.1		Emphasize focused instruction on literacy and numeracy to ensure all students read and calculate at grade level by the end of third grade.
Action 2.2.2		Develop robust Multi-tiered Systems of Support (MTSS) program to grow caring communities and support the whole child and positive student dispositions.

White River Valley Strategic Plan 2016-2021

Action 2.2.3		Provide early intervention training in MTSS for all PK-6 teachers and staff.
Objective 2.3	Re-design middle school to create a developmentally appropriate learning environment that challenges and nurtures students while affording all learners significant opportunities to take risks and explore individual interests.	
Action 2.3.1		Research Best Practices Advantages of Grouping Adolescent Learners. 7-8-9 (expand level options until the decision is made.)
Action 2.3.2		Investigate delivery models and staffing levels that support learning at the MS level.
Action 2.3.3		Ensure broader curriculum access tailored to early adolescence without the maturity requirements for social/emotional transition with older adolescents.
Action 2.3.4		Expand options for student leadership inside and outside the classroom
Action 2.3.5		Reduce the current failure rates for 9th graders.
Objective 2.4	Expand course offerings and extracurricular options at the high school level so that all students are prepared for college, career, and community engagement.	
Action 2.4.1		Design and develop systems to include students' and parents' voices in the improvement of programs, course offerings, independent study, community based learning opportunities and co-curricular possibilities.
Action 2.4.2		Implement and align high school schedules that maximize students' opportunity to participate in a broad range of educational programming.

White River Valley Strategic Plan 2016-2021

Action 2.4.3		Create Academic Advisory Council (including school counselors, administration, teachers, parents, students, and community members) to identify needs and direction in implementing PLP's, PBGR's and EQS.
Action 2.4.4		Catalogue, organize and list all current course offerings.
Action 2.4.5		Partner with the Vermont State College System to offer college courses within our buildings.
Action 2.4.6		Pilot academic support models to replace study halls.
Action 2.4.7		Hire teachers with advanced degrees to teach dual enrollment classes and alternative experiential school programs.
Objective 2.5	Create an environment where students, families, and community members are encouraged to volunteer, participate in decision making groups, and serve in leadership roles within the school.	
Action 2.5.1		Research and identify evidence-based family/community engagement strategies
Action 2.5.2		Increase family involvement and volunteerism by establishing a SU wide committee or parent liaison to advise and oversee the development and implementation these strategies
Action 2.5.3		Provide materials and trainings for parents to work with their children to improve academic achievement
Action 2.5.4		Provide regular and effective dissemination of information about the benefits of parent involvement in child's education.

White River Valley Strategic Plan 2016-2021

Goal 3	Equity	Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.
Objective 3.1	Employ multi-tiered systems of support in every classroom to ensure growth and learning for all students.	
Action 3.1.1		Implement recommendations of the AOE MTSS consultants.
Action 3.1.2		Use assessment data to determine student progress and target interventions for improvement.
Action 3.1.3		Facilitate Whole Child wrap-around services so that all students come to school ready to learn.
Objective 3.2	Offer all students opportunities for differentiation and enrichment at every grade level.	
Action 3.2.1		SU schools will communicate available enrichment offerings between and across schools as well as additional opportunities regionally and state-wide.
Action 3.2.2		Develop an inventory of available SU academic and co-curricular activities to increase and improve enrichment opportunities for all students.
Action 3.2.3		Develop an inventory of faculty enrichment knowledge and skillsets.
Action 3.2.4		Develop and design an SU wide enrichment exhibition for elementary (K-4), middle (5-8), and high school levels (9-12).
Action 3.2.5		Provide educational and informational opportunities for parents regarding differentiation and enrichment opportunities for all students.

White River Valley Strategic Plan 2016-2021

Objective 3.3	Address the "digital divide" within and between schools through a comprehensive, synchronized digital learning plan consonant with pedagogical objectives and community communication requirements	
Action 3.3.1		Assess teachers' current technology integration competencies across the SU.
Action 3.3.2		Support teachers to consistently advance effective instructional integration of technologies.
Action 3.3.3		Employ technologies that effectively increase student engagement and promote problem solving, critical thinking and research skills.
Action 3.3.4		Ensure all SU schools have equitable IT infrastructure to effectively facilitate learning.
Action 3.3.5		Identify and implement technologies that enhance communication, learning opportunities, and efficiencies between and across SU schools.
Objective 3.4	Provide high quality afterschool and summer programming.	
Action 3.4.1		Align afterschool/summer program goals with SU and school goals.
Action 3.4.2		Develop tools and provide professional development of staff to identify student needs, promote safety, and increase student engagement.
Action 3.4.3		Develop communication protocols and collaboration between afterschool/summer staff and Special Education.
Action 3.4.4		Establish an advisory committee composed of representative communities and partners.
Action 3.4.5		Develop and implement strategies to ensure quality and sustainability in Site Coordinator positions.

White River Valley Strategic Plan 2016-2021

Objective 3.5	Cultivate partnerships with parents, business and community organizations to provide a sustainable system of support and care for each student.	
Action 3.5.1		Create a multi-stakeholder Advisory Board from Industry, Business and Post Secondary Institutions.
Action 3.5.2		Collaborate across high schools to ensure that all students have access to high quality work-based learning opportunities.
Action 3.5.3		Engage and partner with area businesses to support work based and personalized learning plan development.

White River Valley Strategic Plan 2016-2021

Goal 4	Efficiency	White River Valley Supervisory Union resources will be allocated responsibly and sustainably to optimize student benefit.
Objective 4.1	Realign governance structures and educational delivery systems to ensure that boards and administration devote the majority of their time focusing on and promoting student learning.	
Action 4.1.1		Balance budget percentages spent on instruction per district so that the percentage is consistent across the SU.
Action 4.1.2		Develop a method of routinely reporting school quality metrics to all district boards.
Action 4.1.3		Create board meeting structures which focus agendas on supporting teaching and learning for the majority of their meetings each month.
Action 4.1.4		Add non-voting student representatives to all K-12 boards
Action 4.1.5		Ensure that there are student presentations and teacher presentations on every board agenda.
Objective 4.2	Commit to meet the objectives and goals of Act 46 and adopt Act 46-compliant school structures, including alternative structures, to achieve greater operational efficiencies within and between districts.	
Action 4.2.1		Review demographic data as part of the Act 46 study committee process.
Action 4.2.2		Conduct financial analyses to inform the Act 46 study committee process.

White River Valley Strategic Plan 2016-2021

Action 4.2.3		Study the range of educational structural options to fulfill WRVSVU Mission and Vision.
Objective 4.3	Consolidate contracts and services wherever possible to allow resources to be directed toward students.	
Action 4.3.1		Align all SU staff contracts with unified language, develop a plan for consolidated salary schedules, and offer responsible benefits packages that are competitive.
Action 4.3.2		Create process to solicit input from everyone within the educational community to find efficiencies.
Action 4.3.3		Direct staff to use the competitive bid process to hold down cost.
Action 4.3.4		Implement bulk buying and consolidate service contracts wherever feasible.
Objective 4.4	Optimize data-gathering and designing efficient processes and systems to monitor and report performance and accountability	
Action 4.4.1		Use the local and state assessment data to look for trends and specific target interventions for students.
Action 4.4.2		Ensure Renaissance Star 360 data is collected at least three times per year, supported by a common calendar, to inform resource allocation.
Action 4.4.3		Create a culture of using research to inform our decisions and improve academic achievement for all students.
Action 4.4.4		Develop efficient communication plan to share school effectiveness and opportunity information with all stakeholders.

2016-2021 WRVSU Strategic Plan Blueprint for Change

1. Quality Goal Statement: The WRVSU will offer a world-class education to every student.					
Detailed Plan of Action: <u>Objective 1</u> -Require excellence in instruction; support it through use of best practices, robust evaluation systems, and a dynamic professional development program.					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
1.1.1 Identify and index expected best practices.	Summer 2016	Administrators & Teachers	Administration	Time	
1.1.2 Provide instructional best practice support for teachers and administrators. Identify and use evaluation system based on best practice for effective instruction.	School Year 2016-17	Administrators & Teachers	Administration	Time Sample Systems	
1.1.3 Establish mentoring programs for teachers and administrators new to the SU.	School Year 2016-17	Administrators & Teachers	Administration	Resources eg. NEA state partnership Time	
1.1.4 Emphasize instructional leadership and allocate resources to support effective instructional practices for all students.	2017-18-ongoing	Board, Superintendent	Superintendent	HR/research Time	
1.1.5 Develop a robust teacher and administrator recruitment program.	2017-18	Board Superintendent	Superintendent	Examples/AOE Guidance	
1.1.5.a Update job descriptions to include skills, beliefs, attitudes to deliver world class education.	2016-17	Superintendent Board	Superintendent	Examples/ Research	
1.1.5.b Attract and hire high quality candidates with demonstrated passion for their	2017-18-ongoing	Board	Superintendent	Research/ Guidance	

2016-2021 WRVSU Strategic Plan Blueprint for Change

position, content area or grade level, techniques in delivery of curricula, and knowledge of pedagogy.				
<p>1. Quality Goal Statement: The WRVSU will offer a world-class education to every student.</p> <p>Detailed Plan of Action: <u>Objective 1</u>-Require excellence in instruction; support it through use of best practices, robust evaluation systems, and a dynamic professional development program.</p>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
1.1.5.c Develop and implement an interview process designed to uncover preparation for the position.	2017-18-ongoing	Participants Superintendent Board	Facilitator Superintendent	Resources
1.1.6 Create multidimensional model for teacher development and retention.	2016-17	Admin/Teachers	Admin/Teachers	Identify resources
1.1.6.a Identify specific goals and needs, ie technology integration, instructional delivery, assessment, grading ...	2016-17	Curriculum Council		
1.1.7 Develop a culture of regular teacher collaboration.	2016-17-ongoing	Admin/Teachers	Admin/Teachers	
1.1.7a Annual calendar schedules regular times for continuous collaboration and professional development.	2016-17-ongoing	Superintendent	Superintendent	
1.1.7b Teachers meet to evaluate student work aligned to curriculum and assessments to inform instruction and achieve mastery.	2016-17-ongoing	Admin/Teachers	Teacher Leaders	Sharing best practices

2016-2021 WRVSU Strategic Plan Blueprint for Change

<p>1. Quality Goal Statement: The WRVSU will offer a world-class education to every student.</p> <p>Detailed Plan of Action: <u>Objective 2</u>-Use rigorous and evidence-based curricula throughout the SU.</p> <p><u>Objective 3</u>- Offer relevant, engaging, collaborative, hands on, and real-world learning experiences to every student</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
1.2.1 Develop SU and school-based curriculum teams to research, analyze and develop, relevant, rigorous, and evidence-based curriculum.	2016-17	Equal Representation from all schools	Curriculum Coordinator	Time and committee charge	
1.2.2 Provide resources and technical support for curriculum implementation.	2016-17	Admin/Teachers/IT	Admin.	Time and committee charge	
1.2.3 Align and map curricula with State and National standards.	2017/18-	SU Curriculum Team	Curriculum Coordinator	Time and examples	
1.2.4 Implement Professional Learning Communities.	2017-18	Admin-Teachers	Teacher Leaders	PD and Time	
1.3.1 Provide experiential learning opportunities for all students, across the curriculum.	2016-17-Ongoing	Admin/ Students	Students	Ongoing PD	
1.3.2 Develop a structure for planning, budgeting, and evaluating learning experiences.	2016-19	Admin/Teachers	Guidance	Time/PD	

2016-2021 WRVSU Strategic Plan Blueprint for Change

<p>1. Quality Goal Statement: The WRVSU will offer a world-class education to every student.</p> <p>Detailed Plan of Action: <u>Objective 4-</u> Embed technology in every aspect of students' school experience to broaden and deepen learning. <u>Objective 5-</u> Develop an evidence-based multi-tiered system that will support positive behavior at every school in the WRVSU.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
1.4.1 Institute an SU level Digital Learning Committee to implement the DLP.	2016-17	Equal representation	Tech Director	Time/ Data	
1.4.2 Develop and implement a Digital Learning Plan to support instruction.	2016-17	Teachers DL Committee	Tech Director	Time	
1.5.1 Identify professional development needs.	2016-ongoing	Teachers DL Committee	Tech Director	Time	
1.5.2 Institute a SU wide assessment team.	2016-19	Behavior Guidance Teachers & Admins	Guidance	Consistent Data points/ Time/pd	
1.5.3 Identify specific behavior data points to track across schools.	2016-17	Equal Representation across schools	Curriculum Coordinator	Time/ Data	
1.5.4 Identify and implement best practices and environment to support students with a variety of behavioral needs. Provide social, emotional, and behavior supports and resources.	2016-17- Ongoing	Teachers Counselors Consultants	Guidance	Consistent Data points	

2016-2021 WRVSU Strategic Plan Blueprint for Change

<p>1. Quality Goal Statement: The WRVSU will offer a world-class education to every student.</p> <p>Detailed Plan of Action: <u>Objective 6</u>-Develop and use standardized data points to track, monitor improvement of school performance, and student outcomes across a variety of domains.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
1.6.1 Develop efficiencies in utilizing student information systems.	2016-17-Ongoing	Administration Tech Director Guidance	Tech Coordinator		
1.6.2 Develop and implement SU Improvement Team to monitor strategic plan progress.	2016-17	Equal Representation across Schools	Curriculum Coordinator	Committee charge	
1.6.3 Develop and Implement school based school improvement teams.	Ongoing	Admins Teachers Curriculum Tam	Admin	Structure to support transformation	
1.6.4 Identify assessment practices that support PLP's, PBGR, and EQS.	2017-19	SU Assessment Team	Curriculum Coordinator	Time/Resources	
1.6.5 Research quality data best practices and develop SU-wide data points which can be measured each year to monitor progress over time. (see 1.5.3)	2016-ongoing	SU Assessment Team	Curriculum Coordinator	Time/Resources	

2016-2021 WRVSU Strategic Plan Blueprint for Change

<p>2. Opportunity Goal Statement : The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.</p> <p>Detailed Plan of Action: Objective 2.1 Develop Personal Learning Plans with every student and family to assure that each child can achieve high levels of learning, in different learning modalities and while aligned with his or her interests.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
2.1.1 Structure systems to ensure access to all aspects of PLPs.	2016-spring 2017	Counselors Teachers	Curriculum Coordinator & Director	Time Naviance LIFT	
2.1.2 Develop individual mechanisms to ensure access to all aspects of PLP to include: online college, VAST, Dual Enrollment, Technical and Career Centers, service-based learning, project-based learning, community-based learning, online/distance learning, and cross-union choice.	2016-ongoing	Counselors Teachers Principals Tech Director	Curriculum Coordinator & Director	Time Resources	
2.1.3 Develop classrooms and practical environmental studies curricula.	2016-ongoing		Curriculum Coordinator & Director		
2.1.4 Develop and implement Proficiency Based Graduation Requirements.	2016-ongoing	WRVSU Board	Superintendent Curr. Director	time	
2.1.5 Provide access to more grade level classmates, courses, visual and performing arts, athletics, internships, co-curricular activities, career preparation, advanced placement, early college experiences, and afterschool and summer school opportunities.	2018 - 2019 school year/ 2020-2021	High School Study Committee One Planet ADS School Counselors Vis/Perf Arts Teachers	Superintendent Curr. Director	Time Money for summer work	

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2. Opportunity Goal Statement : The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.

Detailed Plan of Action: Objective 2.1 Develop Personal Learning Plans with every student and family to assure that each child can achieve high levels of learning, in different learning modalities and while aligned with his or her interests. 2.2 Structure and support elementary schools to ensure that all students' performance targets are met. 2.3 Re-design middle school to create a developmentally appropriate learning environment that challenges and nurtures students while affording all learners significant opportunities to take risks and explore individual interests.

Action	Date start/finish	Participants	Facilitators	Resources Involved
2.1.6 Develop SU-wide college visit program for 100% of student population.	2018-2019	School counselors		
2.1.7 Eliminate the constraints of a 4-year graduation timeline.	2018-2019	Principals Boards	Superintendent Curr. Director	
2.2.1 Ensure all students are literate and numerate by the end of third grade.	2019	Teachers Sped Principals Interventionists	Curr. Director	Training: Stern Center OG Time for Teachers Time Money for summer training stipends
2.2.2 Develop robust Multi-tiered Systems of Support (MTSS) program to grow caring	2016-2018	Principals Teachers SPED		Money Time Summer work

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communities and support the whole child and positive student dispositions.		MTSS Consultant from state Home School coordinators (CMC or other?) Health Hub		
<p>2. Opportunity Goal Statement: The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.</p> <p>Detailed Plan of Action: <u>2.2 Structure and support elementary schools</u> to ensure that all students' performance targets are met. <u>2.3 Re-design middle school</u> to create a developmentally appropriate learning environment that challenges and nurtures students while affording all learners significant opportunities to take risks and explore individual interests.</p>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
2.2.3 Provide early intervention training in MTSS for all PK-6 teachers and staff.	2016/2021	Teachers SPED Principals Interventionists Pre-school teachers		Training: Stern Center OG Time for Teachers Time Money for summer training
2.3.1 Research Best Practices Advantages of Grouping Adolescent Learners 7-8-9 (expand level options until the decision is made.)	2018 (after MTSS is developed)	Teachers Principals	Curr. Director	Money Time for conferences
2.3.2 Investigate delivery models and staffing levels that support learning at the MS level.	2016-ongoing	Teachers Principals Counselors		Money Time for conferences

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<p>2. Opportunity Goal Statement : The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.</p> <p>Detailed Plan of Action: <u>2.3 Re-design middle school</u> to create a developmentally appropriate learning environment that challenges and nurtures students while affording all learners significant opportunities to take risks and explore individual interests.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
2.3.3 Ensure broader curriculum access tailored to early adolescence without the maturity requirements for social/emotional transition with older adolescents.	2016-ongoing	Teachers Principals Counselors	Principals Counselors	Money Time for conferences	
2.3.4 Expand options for student leadership inside and outside the classroom.	2016-ongoing	Teachers Principals Counselors	Principals Counselors	Money Time for conferences	
2.3.5 Reduce the current failure rates for 9th graders.	2016-ongoing	MTSS Team School Counselors SPED Principals	Principals Counselors		
2.3.5a. Improve attendance/absence rates for all students.	2016-ongoing	DCF Truancy Officers School Board	Principals Counselors	Clear truancy procedures	
2.3.5b. Increase class sizes beyond the current 5 or fewer students.	2016-ongoing	Teachers Principals Counselors			
2.3.8c. Provide for rigorous dialogue, multiple perspectives, more choices and interactions with other students	2016-ongoing	Teachers Principals Counselors			

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2.3.9d. Develop rich electives to explore as students think ahead to career and college options in a personalized learning environment. Exploration through WBL.	2016-ongoing	Teachers Principals Counselors		
2. <u>Opportunity</u> Goal Statement : The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.				
Detailed Plan of Action: <u>Objective 2.4</u> Expand course offerings and extracurricular options at the <u>high school level</u> so that all students are prepared for college, career, and community engagement				
Action	Date start/finish	Participants	Facilitators	Resources Involved
2.4.1 Design and develop systems to include students' and parents' voices in the improvement of programs, course offerings, independent study, community based learning opportunities and co-curricular possibilities.	2016-2021	Principals Guidance	Curriculum Director	Time and Money
2.4.2 Implement and align high school schedules that maximize students' opportunity to participate in a broad range of educational programming.	2016-2021	Principals Guidance		
2.4.3 Create Academic Advisory Council (including school counselors, administration, teachers, parents, students, and community members) to identify needs and direction in implementing PLP's, PBGR's and EQS.	2016-2017	Principals Guidance		
2.4.4 Catalogue, organize and list all current course offerings.	2016-2017	Principals Guidance		
2.4.5 Partner with the Vermont State College System to offer college courses within our buildings.	2016-2021	Principals Guidance		
2.4.6 Pilot academic support models to replace study halls.	2016-2021	Principals Guidance		

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2.4.7 Hire teachers with advanced degrees to teach dual enrollment classes and alternative experiential school programs.	2017-2021	Principals Guidance		
<p>2. Opportunity Goal Statement : The White River Valley Supervisory Union will offer students at every grade level a broad array of challenging, engaging learning experiences, both in the classroom and after school.</p> <p>Detailed Plan of Action: <u>Objective 2.5</u> Create an environment where students, families, and community members are encouraged to volunteer, participate in decision making groups, and serve in leadership roles within the school.</p>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
2.5.1 Research and identify evidence-based family/community engagement strategies.	2019-2021	Nurses and Guidance Counselors	Principals Admin Assistants	Time and PD Money
2.5.2 Increase family involvement and volunteerism by establishing a SU wide committee or parent liaison to advise and oversee the development and implementation these strategies.	2018-19	Parent Liaison Teachers	Parent Liaison	Time Money
2.5.3 Provide materials and trainings for parents to work with their children to improve academic achievement.	2018-20	Parent Liaison Teachers	Parent Liaison	Time Money
2.5.4 Provide regular and effective dissemination of information about the benefits of parent involvement in child's education.	2018-20	Counselors Teachers Case managers	Parent Liaison	Time Money
2.5.4a Offer a wide variety of opportunities for parents, students and community members to volunteer in and engage with the school.	2018-20	Counselors Teachers Case managers	Parent Liaison	Time Money

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<p>3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: <u>Objective 3.1</u>-Employ multi-tiered systems of support to ensure growth and learning for all students.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
3.1.1 Implement recommendations of the rubric analysis work with AOE MTSS Consultants.	2017 - 2018	PK-12	Consultants Admins Teachers	\$ PD Time	
3.1.2 Use assessment data to identify students not making expected progress; to use results to target interventions and to monitor progress at regular intervals.	2016-2017	Principals, Teachers, Counselors, Curriculum Team	Curriculum Team	Time Star 360 PNOA Teaching Strat Gold SBAC/NECAP	
3.1.3 Facilitate Whole Child wraparound services so that all students come to school ready to learn.	2018 - 19	Principals, Teachers, Counselors	Counselors	\$ Time PD	

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3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed Plan of Action: <u>Objective 3.2</u> - Offer all students opportunities for differentiation and enrichment at every grade level.					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
3.2.1 SU schools will communicate available enrichment offerings between and across schools as well as additional opportunities regionally and state-wide.	2017-2018	Communication Leader	Communication Leader	CFP PK Grant Grants	
3.2.2 Develop an inventory of available SU enrichments opportunities.	2016-2017	Principals	Communication Leader	Time \$	
3.2.3 Develop an inventory of faculty enrichment knowledge and skillsets.	2016-2017	Teachers All professionals All staff	Communication Leader	Time \$	
3.2.3a. Provide opportunities for faculty to attend professional development on enrichment and differentiation.	2016-2018	Teachers	Curriculum Directors Principals	Time \$	
3.2.4 Develop and design an SU wide enrichment exhibition for elementary (K-4), middle (5-8), and high school levels (9-12).	2016-2018	Student Enrichment Leaders	Communication Leader	Time \$	
3.2.5 Provide educational and informational opportunities for parents regarding differentiation and enrichment opportunities for all students.	2016-2017	Communication Leader	Communication Leader	Time \$	

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<p>3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: <u>Objective 3.3</u> - Address the “digital divide” to provide equity between and within schools through a comprehensive digital learning plan.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
3.3.1 Assess teachers' current technology competencies and provide professional development opportunities on the effective use of technologies.	2016-2018	Teacher Leaders Director of Technology	Technology Curriculum Director	Grants Individual PD	
3.3.2 Support teachers to consistently advance effective instructional integration of technologies.	2016-2017	Digital Learning Committee	Director of Technology	\$	
3.3.3 Employ technologies that effectively increases student engagement and promotes problem solving, critical thinking and research skills.	2016 - 2019	Teachers Techs Director of Technology	Director of Technology	\$	

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<p>3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: <u>Objective 3.3</u> - Provide equity between and within schools through a comprehensive digital learning plan.</p> <p><u>Objective 3.4</u> - Provide high quality afterschool and summer programming.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
3.3.4 Ensure all SU schools have equitable technology infrastructure to effectively facilitate learning.	2016-2017	School Techs IT Director DL Committee	IT Director	Time	
3.3.5 Identify and implement technologies that enhance communication and learning opportunities between and across SU schools.	2016-2018	IT Director Tech Committee	IT Director	Time Budget Equipment PD	

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3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country: Detailed Plan of Action: <u>Objective 3.4- Provide high quality afterschool and summer programming.</u>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
3.4.1 Align afterschool/summer program goals with SU and school goals.	2016-2017	One Planet Director Special Ed Director Regular ed rep teachers Curriculum leader	One Planet Director	Time
3.4.2 Develop tools and provide professional development of staff to identify students in the areas of social emotional development, academics and economic factors.	2016-ongoing	Building and grade level rep teachers	Curriculum Director and assistant	PD Time
3.4.3 Develop communication protocols and collaboration between afterschool/summer staff and Special Education.	2016-2017	One Planet Director Special Ed Director	One Planet Director Special Ed Director	Time

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3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed Plan of Action: <u>Objective 3.4- Provide high quality afterschool and summer programming.</u>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
3.4.4 Establish an advisory committee composed of representative communities and partners.	2016 -2017	One Planet Director Parents Teacher	One Planet Director	Time
3.4.5 Develop and implement strategies to ensure quality and sustainability in site coordinator positions	2016-2017			
3. Goal Statement: Equity-Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed Plan of Action: <u>Objective 3.5 -Cultivate partnerships with parents, business and community organizations to provide a sustainable system of support and care for each student.</u>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
3.5.1 Create a Parent Advisory Council and an Advisory Board from Industry, Business and	2017-2018	Principals	SU Work Based Coordinator	\$

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Post Secondary Institutions:					
3.5.2 Collaborate across high schools to ensure that all students have access to high quality work-based learning opportunities.	2017-2018	SU Work Based Coordinator Community Businesses	SU Work Based Coordinator	\$	
3.5.3 Engage and partner with area businesses to support work based and personalized learning plan development.	2017 -2018	SU Work Based Coordinator Community Business	SU Work Based Coordinator	Time	
4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed					
Plan of Action: Objective 4.1 Realign governance structures and educational delivery systems to ensure that boards and administration devote the majority of their time focusing on and promoting student learning.					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
4.1.1 Develop the current spending percentage on instruction per district so that the percentage is consistent across the district is at least 75%	2016 - Ongoing	Administrators Superintendent SU Business Manager	School Board Administration Central Office	SU Policy/Procedure Purchasing Unified CBA	

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per year for 2017-18, 80% in 2018-19 and 80% in 2019-20.					
4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed					
Plan of Action: <u>Objective 4.1</u> Realign governance structures and educational delivery systems to ensure that boards and administration devote the majority of their time focusing on and promoting student learning.					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
4.1.2 Develop a method of routinely reporting school quality metrics to all district boards.	August 2016 - Ongoing	Administrators	Administration	Time	
4.1.3 Create board meeting structures which focus agendas on supporting teaching and learning for the majority of their meetings each month.	2017 --Ongoing	Superintendent Board	Central Office Administrators Teachers	Board Training	
4.1.4 Add non-voting student representatives to all K-12 boards.	October 2016 - Ongoing	Student Council Administrator Teacher Advisor	Administrator	Leadership Training	
4.1.5 Ensure that there	October 2016 -	Teacher	Administrator	Leadership Training	

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are student presentations and teacher presentations on every board agenda.	Ongoing	Administration Students Parents	Board	Calendar
<p>4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: <u>Objective 4.2</u> Commit to meet the objectives and goals of Act 46 and adopt Act 46 compliant school structures, including alternative structures, to achieve greater operational efficiencies within and between districts.</p>				
Action	Date start/finish	Participants	Facilitators	Resources Involved
4.2.1 Review demographic data as part of the Act 46 study committee process.	2016 - Ongoing	Superintendent SU and Building Administration	Administration IT SU and Building Admin	Time
4.2.2 Conduct financial analyses to inform the Act 46 study committee process.	2016 - Ongoing	Administrators Superintendent Business Manager	Superintendent Administrators Business Manager	Money for a Facilities Director position Develop Policy and Procedures
4.2.3 Study the range of educational structural options to fulfill WRVSU Mission and Vision.	2016 - Ongoing	Administrators Superintendent Business Manager	Superintendent Administrators Business Manager	Money for a Facilities Director position Develop Policy and Procedures

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4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country. Detailed Plan of Action: 4.3 Consolidate contracts and services wherever possible to allow resources to be directed toward students.					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
4.3.1 Align all SU staff contracts with unified language, develop a plan for consolidated salary schedules, and offer responsible benefits packages that are competitive.	2016 - Ongoing	Administrators Superintendent SU Business Manager	School Board Administration Central Office Teachers/Union	SU Policy/Procedure Purchasing Unified CBA	
4.3.2 Create process to solicit input from everyone within the educational community to find efficiencies.	2016 - Ongoing	Administrators Superintendent SU Business Manager	Administrators	Time	
4.3.3 Direct staff to use the competitive bid process to hold down cost.	2016 -Ongoing	Administrators Superintendent SU Business Manager	Administrators		

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<p>4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: 4.3 Consolidate contracts and services wherever possible to allow resources to be directed toward students. 4.4 Optimize data gathering and designing efficient processes and systems to monitor and report performance and accountability.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
4.3.4 Implement bulk buying and consolidate service contracts wherever feasible.	2016 - Ongoing	Administrators Superintendent SU Business Manager	Administrators		
4.4.1 Use the local and state assessment data to look for trends and specific target interventions for students.	2016-ongoing	Principals Teachers, Assessment Team	Assessment Team	Time Stipends	
4.4.2 Ensure Renaissance Star 360 data is collected at least three times per year, supported by a common calendar, to inform resource allocation.	2016-ongoing	Principals Teachers, Assessment Team	Assessment Team	Dates are before Columbus Day, before Winter Break, before Memorial Day.	

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<p>4. Goal Statement: Efficiency- Students throughout the White River Valley Supervisory Union will receive an education that is substantially equal within and between each school and is on par with excellent schools in Vermont and across the country.</p> <p>Detailed Plan of Action: 4.4 Optimize data gathering and designing efficient processes and systems to monitor and report performance and accountability.</p>					
Action	Date start/finish	Participants	Facilitators	Resources Involved	
4.4.3 Create a culture of using research to inform our decisions and improve academic achievement for all students.	2017-ongoing	Principals Teachers, Data Team	Data Team	Time	Stipends
4.4.4 Develop efficient communication plan to share school effectiveness and opportunity information with all stakeholders.	2016-ongoing	Principals Teachers, Data Team	Data Team	Time	Stipends

White River Valley Supervisory Union

**ACT 46 EXPLORATIONS
Report and Recommendation**

**Submitted by the
WRVSU Leadership and Governance Committee
February, 2016**

Report and Recommendations adopted by WRVSU Transition Board 2/22/16

White River Valley Supervisory Union

ACT 46 EXPLORATION **Report and Recommendation**

Context for this Report

In the fall of 2015, the ten towns of the new White River Valley Supervisory Union entered into a process to explore available structural options under Act 46. The Leadership and Governance Committee was charged with undertaking this activity and with coming up with recommendations for the Transition Board and the 10 individual boards to consider. This report describes the basic process and proposes recommended actions to the Transition Board for further consideration.

Background

In January, 2015, the State Board of Education ordered the merger of the Orange Windsor and Windsor Northwest supervisory unions. The ten involved towns came together and created a vision for the new supervisory union as follows:

We envision an education system in the White River Valley where students are engaged in vibrant educational experiences that prepare them for college, career, and life in a democratic society. From experiences within and beyond the walls of our school buildings, students emerge from our education system with academic proficiencies and transferable skills, including clear and effective communication, self-direction, creative and practical problem-solving, responsible and involved citizenship, and informed and integrated thinking. The cost of education is sustainable and strongly supported by our communities. Families seek to reside in the region both because of our strong, healthy communities and our exceptional education system.

Further, the defining document made clear that *the creation of the new supervisory union is not simply about merging business functions or the changing of boundaries; rather it is building a foundational structure that will:*

- *Allow for the creation of an exceptional education experience for all children in the White River Valley.*
- *Ensure strong leadership to support the education program throughout the region.*
- *Achieve immediate efficiencies and create the potential for greater cost-effectiveness over time.*

Early on, the boards of both merging supervisory unions committed to an ambitious strategic planning process, designed to help the involved communities create a more detailed common vision for education in this region. With the help of the International Center for Leadership in Education the new supervisory union has mapped out a future that calls for the creation of a unified high school program for operating towns, strong middle school opportunities for all students, and strengthened, more equitable experiences for elementary students. The basic framework of the full strategic plan was released on January 25, 2016, and provides a blueprint for actions going forward.

As the two supervisory unions began preparing for the merger into one, Act 46 was adopted into law by the Vermont legislature, laying out goals as follows:

- *Provide substantial equity in the quality and variety of educational opportunities;*
- *Lead students to achieve or exceed the State's Education Quality Standards;*
- *Maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with the goal of increasing the district-level ratio of students to full-time equivalent staff;*
- *Promote transparency and accountability;*
- *Deliver education at a cost that parents, voters, and taxpayers value.*

Act 46 pushes for the creation of somewhat larger *districts* across the state of Vermont to promote substantially improved education at a more advantageous cost.

The White River Valley Supervisory Union is committed to addressing the challenges of Act 46 in a fashion that focuses on the goals established in the formative process of the new supervisory union and the work done on the strategic plan. The White River Valley Transition Board has charged its Leadership and Governance Committee with exploring the options under Act 46 and bringing recommendations to the full board before the end of January, 2016.

The Compelling Case for Action

The Leadership and Governance Committee has concluded that the status quo is not acceptable—whether viewed from the perspective of students or from that of property taxpayers.

Many of our schools are not able to provide the range of educational opportunities that we desire. With each further loss in the number of students, programs are at risk in order to keep taxes at a reasonable level. Opportunities between schools are inequitable in terms of offerings and available technology. We cannot provide the range of group activities needed for all of our children. Particular students often find themselves with few peers. Our students are telling us that they want more opportunity and more connections, particularly at the middle and high school levels. Our strategic planning process leads us toward a unified high school for operating towns, much stronger middle school opportunities, and more equitable elementary education.

At the same time, an early financial analysis using a tool created by the Vermont School Boards Association, the Vermont Superintendents Association, and the Vermont School Boards Insurance Trust indicates that the probable loss of small schools grants and “ADM hold-harmless” protections, both called for in Act 46, could result in dramatic tax increases for the homestead property tax payers in the vast majority of our communities-- see Appendix A.

Inaction is not an option.

The Opportunities of Act 46

Act 46 provides a broad range of options for action. On one end of the continuum, there is an option for quick action for a supervisory union to become a unified district. This is not well suited to a supervisory union such as the WRVSU, given its blend of operating and tuitioning districts. On the other end of the spectrum, districts can make the case that the goals of Act 46 can be met within the current structure. Given the challenges in the region, justifying the status quo does not seem like a good option. All options have their pros and cons. Some come with incentives, protections and supports. Others do not. Some prevent any further action by the state. Others leave open the option for the State Board of Education to order a restructuring of the region effective July 1, 2019.

The Leadership and Governance Committee of the WRVSU has focused on options that will best achieve educational objectives, increase efficiency, maximize incentives for taxpayers, and allow the region to progress on its own terms and avoid an imposed state plan later on. These options would fall under the category of the merger options provided for under Act 153 and Act 156, including structures such as a Regional Education District (RED) or various other configurations such as “side-by-side” districts that involve the unification of school districts.

If current districts receive approval from voters by July 1, 2017, those types of actions carry four years of homestead tax incentives (\$.08, \$.06, \$.04, \$.02). The newly formed districts will be able to keep their small schools grants as “merger support grants” and can keep the “ADM hold-harmless” provision. They will also qualify for the \$150,000 transition grant.

The Criteria for Moving Forward

The committee started by developing criteria for selection of the best possible options for the White River Valley SU. Those criteria were ranked to determine the strongest considerations in weighing options. Below is the list of criteria that was selected along with the weighting that was determined by the group:

Screens for any options (Any structural choices selected under Act 46 need to meet all of these objectives):

- Assure that it will move education forward in all towns.
- Allow the two non-operating towns to have the option of remaining so.

- Allow the towns that do not operate high schools to have the option of continuing to tuition their students.
- Meet basic legal standards.
- Pre-empt state action.

Criteria against which to measure options being considered:

Weight	Criteria
4.5	<p>1. Creates an integrated world class education system for all children in the region as defined by the overall strategic plan:</p> <ul style="list-style-type: none"> • Creates a robust, unified, innovative high school for operating towns and a highly desirable option for students in high school choice towns. • Creates a strong, equitable middle school education for all students in the region that assures all students arrive at high school having had similar opportunities. • Promotes strong elementary education, grades pre-K-6 in all parts of the region, with a focus on essential learning skills across the curricula and with technology equity for all.
1.5	2. Assures community involvement/influence in ongoing education planning and implementation.
1.4	3. Maximizes the tax incentives for taxpayers under Act 46.
1.8	4. <i>Maximizes operational efficiencies.</i> Efficiencies are achieved both to increase the resources available for educational opportunities as well as to assure long-term fiscal sustainability.
.9	5. Provides simplicity of governance with clearer accountability..

After further work was done by the committee, it was determined that any option pursued must provide incentives for all taxpayers. That criterion was moved to the level of a screening consideration.

Generation of Options

The committee then developed a long list of possible structural options which were reviewed to determine the degree to which they meet the criteria. The full list of options can be found in Appendix B.

The committee narrowed its consideration to a fundamental question:

Can we best achieve our goals by creating “side-by-side” districts that are created to accommodate varied configurations of operating and tuitioning, or creating broader horizontal districts by grade layers?

Below is a summary of the analysis that emerged from the committee conversation:

The “Vertical” Side-by-Side Option

Ideally, this would involve the creation of three districts within the SU, although there could be four. Keep in mind that these new districts would be responsible for oversight of education in a larger region. It is assumed that larger operating districts would operate multiple schools.

One would be for those current districts desiring to be part of a PreK-12 operating district.

One would be for those desiring to operate some grades and tuition others. (If this is one district, all would have to decide on the grade level for operating/tuitioning split and all would need to agree on the approach to high school tuitioning).

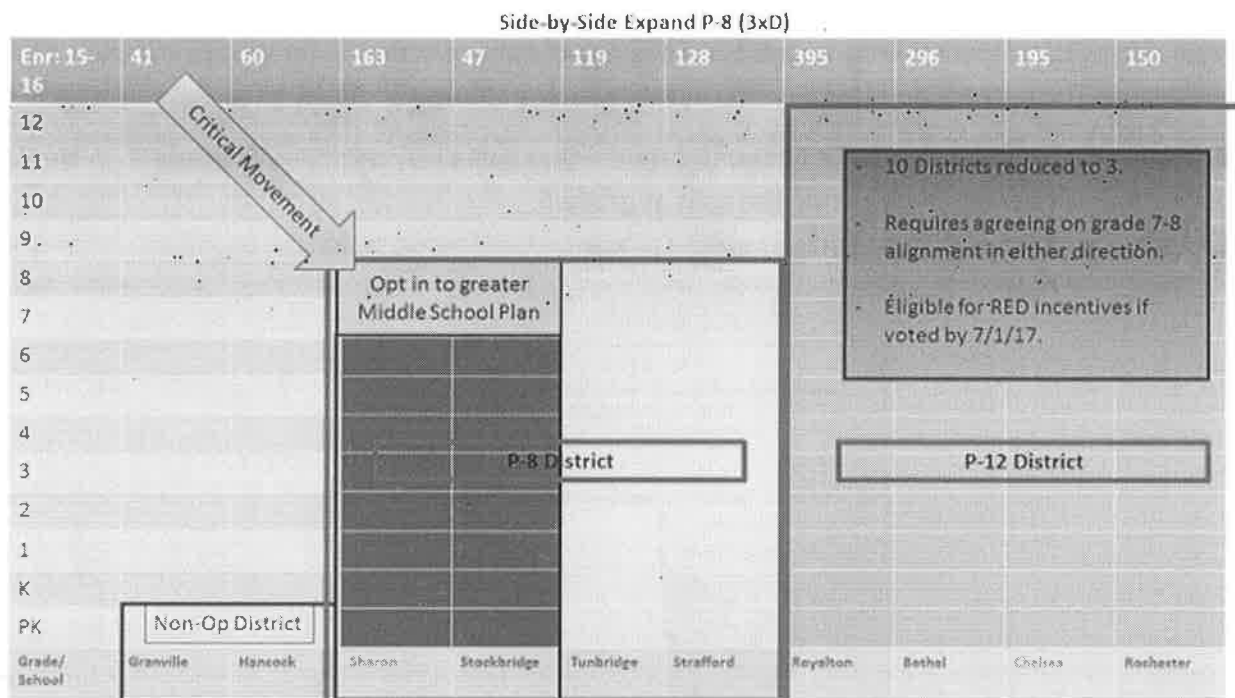
One would be for those desiring to tuition for all grades.

The big advantage of a vertical side-by side is that education oversight for children of a particular area would be provided by one board, grades preK-12, whether through operating schools or payment of tuition. This model also has the benefit that it is clear that if all three of the new districts are created by two or more current districts, all participating towns in the region would receive incentives.

The big disadvantage is that the vertical side-by sides would not necessarily be comprised of contiguous districts. It could create a substantial challenge in the effort to integrate, strengthen, and equalize elementary and middle school education for all students in the White River Valley.

Two big decisions will need to be made through the study committee process by the district that would both operate and tuition. One is the decision on whether to operate or tuition for grades 7 and 8. The other will be to decide on a common approach to tuitioning for high school. Will the district allow total choice or designate one or more possible high schools?

Below is a graphic portrayal of a sample vertical “side-by-side”. This particular picture imagines one district operating PreK-8 and tuitioning grades 9-12. It would be equally illustrative if that district operated PreK-6 and tuitioned grades 7-12. It also shows particular districts in particular categories. It is possible through the planning process that these specifics would be different as a district may choose to propose fitting into a different district than those shown.



The Horizontal Model

This model would involve the creation of four school districts:

One would be non-operating.

One would be a union elementary school which would serve all students grades preK-grade 8 or grade 6 (depending on the decision of the group), in multiple buildings.

One would be a union high school (possibly a middle/high school) operating in one or more buildings.

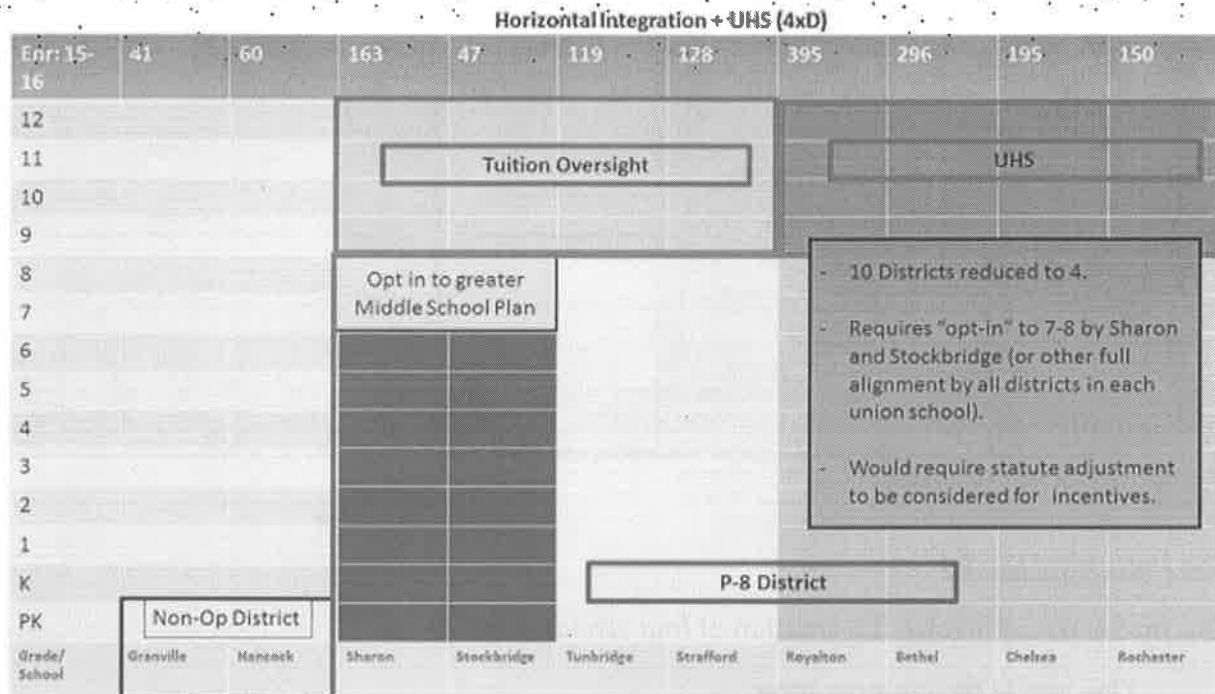
The fourth would be a high-school (possibly a middle/high school) tuition-paying district for those towns whose students are neither part of the non-operating districts nor the union high school.

The big advantage of this model is that it would be easier to achieve high quality, equitable education for all students in the region in the elementary and, possibly, the middle school grades. Students living in the same valleys and interacting in the various communities of the SU would all benefit from a common curriculum, common professional development, greater sharing of staff and programs, and greater choice among the available public schools. If the union elementary school district also oversees middle school, a comprehensive program could be conducted with larger numbers of students in multiple sites.

The educational downside is that two boards would be responsible for the educational experience of students from a particular town—one overseeing grades preK-8 (or 6) and the other the high school years. Perhaps the biggest drawback is that this plan, as the law currently

is constructed, does not qualify for incentives. If the region chooses to go down this road, some legal and political work will be needed to have any chance of securing financial incentives and supports. The current political environment for such a change is challenging.

Below is a graphic portrayal of a horizontal model that splits responsibility at grade 8. A similar diagram could be drawn depicting the split at grade 6.



NOTE: In both of these models, the White River Valley Supervisory Union will continue to exist and will be a critical structure to assure that the new districts function as an integrated education system in the interests of all students and the taxpayers of all of the new districts.

Recommendations

The committee was split on the educational and financial benefits of the horizontal model vs. the vertical model. However, despite those differences, the committee has come to the consensus that the districts of the White River Valley Supervisory Union should pursue the creation of three districts within the vertical model.

Key considerations expressed were:

- The vertical model is the structure promoted by the state through Act 46. It is premised on one board being responsible for the overall education of children prekindergarten through grade 12. The vast majority of students in the SU would benefit from that kind of vertical integration.

- Act 153, Act 156, and Act 46 all provide incentives for districts that work hard to create vertical integration. Although it would be legally possible to create new districts in the horizontal model, it is not likely that there will be any of the incentives or supports that are available through the vertical model. Current law does not provide for them and it is our understanding that the Chair of the House Education Committee and the Secretary of Education are not inclined to support changes in those laws during the current legislative session.
- It is possible for two or three new “vertical districts” to work closely together through the structure of a streamlined White River Valley SU to achieve stronger integration despite remaining in separate districts. As new districts are created, we must seek opportunities for greater operating integration to maximize benefits for all students and communities.
- A number of districts, particularly those which operate high schools, are feeling a sense of urgency to get underway. Getting incentives and supports through the horizontal approach is not likely to happen any time soon, and may never be approved. It is important for progress not to get bogged down hoping for changes in policy.

Recommendation Number 1-- Study the advisability of creating three new districts.

It is recommended that the districts decide to join one of three study committees “to study the advisability of forming new union school districts”. At least two current districts will need to join each study committee for it to be created. (Note: each district can be a member of only one formal study committee at one time).

The three study committees would be focused on creating the following types of districts:

Prekindergarten – Grade 12 Unified Union District

This type of district would operate all grades for all students. If four districts come together to create such a district, it would be a Regional Education District (RED) and would be eligible for incentives for the involved towns, and would not require a “side-by-side” partner. If there are fewer than four towns serving fewer than 1250 students, incentives will only be available with the creation of at least one of the other districts described below.

Prekindergarten-Grade X Union District with Tuitioning Beyond

This type of district would oversee all education of students, grades PreK-12, with common grades being operated (K-6 or K-8) and with common tuition options being offered for grades beyond the operating years. If this new district has four member towns, it would be a RED and would not require positive action by another group of districts in order to qualify for incentives. If the group has fewer than four towns and has fewer than 1250 students, it would require a “side-by-side” vote with the first group in order to qualify for incentives. It is recommended that current districts contemplating joining a study committee for this type of union district come together

informally in advance to agree tentatively on the operating grade levels and basic high school tuitioning practices. Although, together, you may agree to alter that decision during the study, ultimately this new district cannot have within itself multiple grade levels and disparate tuitioning practices.

Non-Operating District

This type of district would not operate any schools, but rather would tuition all students to other schools. The district would have to have one set of tuitioning policies covering all students. If the new district is comprised of four or more current districts, it could be a RED and not require a positive vote by another area. If it has fewer than four districts and fewer than 1250 students, it would require a "side-by-side" vote with the first group in order to qualify for incentives.

Recommendation Number 2-- Coordinate the design, implementation, and timing of the three study committees to maximize benefits for students and to maximize incentives for taxpayers.

Although decisions to join study committees are ultimately made by district school boards, it is critical that these efforts be designed, implemented, and timed to provide maximum benefit for students and taxpayers and to give them all the best chance of success with voters.

As has already been mentioned, if any new district is created with four or more current districts or has a new combined ADM of 1250 students, the new entity will be considered a RED and will stand alone for incentives. If not, a newly merged district would be eligible for incentives only as one side of a "side-by-side". If the process results in a "side-by-side" proposal, it requires the following to qualify for incentives (quote from Sec. 16, Act 156 of 2012):

1. *each new district is formed by the merger of at least two existing districts;*
2. *each new district meets all criteria for RED formation other than the size criterion;*
3. *one of the new districts provides education in all elementary and secondary grades by operating one or more schools and the other new district or districts pay tuition for students in one or more grades;*
4. *each new district has the same effective date of merger;*
5. *the new districts, when merged, are members of one supervisory union; and*
6. *the new districts jointly satisfy the size criterion of Sec. 3(a)(1) of No. 153.**

Note: The size criterion in Act 153 states "shall have an average daily membership of 1,250 or result from the merger of at least four districts, or both".

It will be critical for the supervisory union to continue to play a coordinating role to guide the work to assure that the needs of students are front and center and to assure that together, all of these criteria are met. This will be critical to assure that all districts who come together have the best possible chance to receive RED incentives and the protections relative to small school

grants and the ADM hold-harmless provision and to receive protection from state board action in 2019.

Recommendation Number 3-- Coordinate the timing.

In order to create “side-by-side” districts, all three new districts would need to be created on the same day. This does not mean that study committees all need to begin on the same day. Some districts have expressed the desire to get going quickly. Others have expressed a desire for more time to consider options.

The committee has agreed that there needs to be a sense of urgency—RED incentives cease to exist if communities do not take action through a vote prior to July 1, 2017. Some committee members have expressed the desire for new districts to be created and able to deliver new opportunities to students by July 1, 2017. Others feel that this is way too ambitious. Starting up a new district on July 1, 2017, would require a vote in communities by Election Day in November, 2016, which would require State Board approval by its September meeting, at the latest. This would only give study groups five months to complete their work.

There was agreement that study committees should be created as soon as possible. Some may start before others. All should be formed and conducting their work no later than May, 2016. All should conduct their work earnestly, to allow for a vote and implementation at the earliest possible time. The outside schedule for a vote should be Spring, 2017 for a common target implementation date of July 1, 2018. If things can move more quickly, that would be great, but any decision to move up the date would need to be agreed to by all to preserve maximum benefits for all.

Next Steps

We recommend that the Transition Board vote to support this report and its recommendations and that it recommend to all member boards that they take up this matter soon after their reorganization meetings in March to determine whether to join a study committee.

Appendix C is a sheet outlining recommended “next steps for boards”. We recommend that each board use it in determining its course of action relative to this collective effort.

We further recommend that the Transition Board assign a sub-group to be sure efforts of multiple study groups are coordinated.

Closing Comments

Our work to date is to be celebrated. We are well on our way to creating a new, integrated supervisory union which can serve as the foundation for this next chapter.

As we complete that work, we must turn enthusiastically into the work of reconfiguring our school districts in order to realize the promise of our strategic plan and assure that we can

achieve an equitable, high quality education program for all our students and assure fiscal sustainability. It is to our advantage to act promptly in a way that allows us to benefit from incentives and avoid a state-imposed solution.

APPENDIX A

COMPARATIVE HOMESTEAD PROPERTY TAX RATES

The chart below is drawn from an Act 46 Financial Modeling Tool developed by the District Management Council for the Vermont Superintendents Association, the Vermont School Boards Association, and the Vermont School Boards Insurance Trust. The purpose of the information is not to show the exact tax rates in the current year (numbers shown are those before CLA adjustments are made), but only to show the relative impact on homestead tax rates if the particular local districts were to lose their small schools grants and “ADM Hold-Harmless” protection.

Districts of the White River Valley Supervisory Union				
Illustration of Impact of Possible Loss of Small Schools Grants and ADM Hold-Harmless Provisions				
Town School District	2015-2016 Homestead Education Tax Rate before adjustment for CLA	2015-2016 Homestead Education Tax Rate w/o small schools grant and ADM hold harmless before adjustment for CLA	% CHANGE	
BETHEL	1.7343	1.7343	0.00%	
CHELSEA	1.5792	1.6584	5.02%	
GRANVILLE	1.2743	2.2525	76.76%	
HANCOCK	1.9372	1.9372	0.00%	
ROCHESTER	1.4819	2.4105	62.66%	
ROYALTON	1.5174	1.5174	0.00%	
SHARON	1.5321	1.5321	0.00%	
STOCKBRIDGE	1.5767	1.6539	4.90%	
STRAFFORD	1.6062	1.6668	3.77%	
TUNBRIDGE	1.5925	1.6489	3.54%	

APPENDIX B

Possible Structural Options

Full Brainstormed List 12 7 15

ONE DISTRICT

- 1-A One operating PK-12 district for the entire SU (10 towns)
- 1-B One PK-12 district, operating for grades PK-6 or 8 and HS choice across the entire SU (10 towns)

TWO DISTRICTS

- 2-A Either of the above options (8 towns) plus one non-operating district (2 towns)

THREE DISTRICTS

- 3-A Non-operating (2 towns), PK-6 (8 towns), middle/high union school (8 towns)
- 3-B Non-operating (2 towns), PK-8 (8 towns—multiple elementary schools, several middle schools), multiple options for high school (designation, union HS, Thetford Academy, extensive waivers offered for flexible decisions)
- 3-C PK-6, grades 7-10, high school with alternative pathways
- 3-D Non-operating (2 towns), Sharon/Stockbridge change to PK-8 and join with Tunbridge and Strafford in a PK-8 single district with High School Choice, PK-12 District (4 Towns)

FOUR DISTRICTS

- 4-A Full Side-by-Side (non-operating (2 towns), PK-6 (2 towns), PK-8 (2 towns), PK-12 (4 towns))

FIVE DISTRICTS

- 5-A Non-Operating (2 towns), K-12 (4 towns), K-6 (2 towns), PK-8 (Tunbridge), Strafford (PK-8 with designation of Thetford Academy).
- 5-B Non-operating (2 towns), PK-6 union elementary district (8 towns), grades 7-8 middle school district (8 towns), union high school (4 towns), choice high school board (4 towns)

TEN DISTRICTS

- 10-A Design an SU operation that is designed to achieve the objectives of the law without changing district structure.

APPENDIX C

RECOMMENDED NEXT STEPS FOR SCHOOL BOARDS

The Transition Board of the White River Valley Supervisory Union is recommending that we form three study committees to study the advisability of creating union school districts.

It is recommended that all boards engage in this discussion as soon as possible to decide whether to become part of a committee. The Transition Board will regularly communicate about the status of the decision process of each board. The Leadership and Governance Committee, together with the Superintendent, will be active in coordinating the efforts across the Supervisory Union.

As soon as a board makes a decision to move in the direction of creating a particular study committee, notify the Superintendent. When two or more boards have responded that they are prepared to move forward, the Superintendent will poll other boards, not yet committed to a direction, to determine their interest and their timetable. The Superintendent, after consulting with the Leadership and Governance Committee, will then meet with the involved boards to design the structure of a committee that meets statutory requirements for membership based on number of equalized pupils. The involved districts will also decide on a budget needed to support their work. Each board will need to vote on a motion to create the committee with representation and budget as recommended and will need to appoint members to the committee. The law requires that at least one school director from each participating district be on the committee. The district may appoint residents who are not school directors to the committee.

As soon as a study committee is created, the Superintendent will apply for a support grant. At its first meeting, "the members of the study committee shall elect a chair who shall notify the Secretary of Education of the appointment".

Note: The goal is for all districts within the White River Valley Supervisory Union to move forward in a coordinated way to provide maximum benefit for students and for taxpayers. It is understood that some boards are prepared to move forward more quickly than others. It may make sense for some study committees to begin before others. Ultimately, each district board needs to make its decision, but needs to be aware of the limited timeframe for this entire endeavor. It is strongly recommended that all study committees be operational as soon as possible, but no later than the end of May, 2016.