

AGENCY OF EDUCATION
Barre, Vermont

TEAM: School Governance Team

ITEM: Will the State Board of Education find that the proposed unified union school district formed by the Northfield School District, located in the **WASHINGTON SOUTH SUPERVISORY UNION** (WSSU), and the Williamstown School District, located in the **ORANGE NORTH SUPERVISORY UNION** (ONSU) is “in the best interests of the State, the students, and the school districts,” and will the State Board therefore vote to approve the attached report of the **Joint Northfield / Williamstown 706 Study Committee** (Study Committee)?

RECOMMENDED ACTION:

- 1. That the State Board of Education finds that the proposed formation of a new unified union school district by the Northfield School District and the Williamstown School District, provisionally to be named the CENTRAL VERMONT UNIFIED UNION SCHOOL DISTRICT, is “in the best interests of the State, the students, and the school districts” pursuant to 16 V.S.A. § 706c(b).**
- 2. That the State Board of Education votes to approve the attached report of the Study Committee.**
- 3. That the State Board of Education votes to approve the temporary assignment of the new unified union school district, if approved, to the ONSU for administrative and other transitional assistance. Assignment would be for the interim period beginning on the date on which the unified union school district becomes a legal entity pursuant to 16 V.S.A. § 706g and ending on July 1, 2018, and would not modify the governing structure of the existing systems.**

STATUTORY AUTHORITY: 16 V.S.A. § 706c; Act 46 of 2015; Act 153 of 2010, Secs. 2-4, as amended; Act 156 (2012), Sec. 15, as amended

BACKGROUND INFORMATION:

I. General

The ONSU consists of three PK-12 districts: the Williamstown School District, which operates schools for all grades, and the Orange and Washington School Districts, both of which operate schools through grade eight and pay tuition for all remaining grades. The WSSU consists of two PK-12 school districts with distinct models of governance: the Northfield School District, which operates schools for all grades, and the Roxbury School District, which operates a school through grade six and pays tuition for all remaining grades. The two supervisory unions are

adjoining, have an established history of collaboration, and jointly employ a Business Manager and a Curriculum Director.

After passage of Act 46, four of the districts within the SUs formed two distinct study committees under 16 V.S.A. § 706: The Joint Orange / Washington 706 Study Committee and the Joint Northfield / Williamstown 706 Study Committee.¹ Both study committees will present proposals to the State Board at its March 2017 meeting that, if approved, will be presented to the electorate of each community on May 2, 2017.

- If both proposals are approved, then the new unified districts would be eligible for tax rate reductions and other transitional assistance available under the “Side-by-Side” program established in Act 156 of 2012, Sec. 15.
- If the voters approve creation of the Orange / Washington proposal, but the Northfield / Williamstown proposal is not approved by its voters, then the Orange / Washington UUSD will be formed despite its ineligibility, as a single unified district, for tax rate reductions or other assistance.
- If the voters approve the Northfield / Williamstown proposal, but the Orange / Washington UUSD is not approved by its voters, then the Central Vermont UUSD (Northfield / Williamstown) will be formed. Under current law it would be eligible as a “Phase 3 Conventional Merger” under Act 46, Sec. 7, which does not provide a \$150,000 Transition Facilitation Grant. If this situation occurs and if the General Assembly does not amend the Conventional Merger legislation to include the Grant, then the new UUSD will request that the State Board grant it a waiver of the size requirements for eligibility as a “RED” pursuant to Act 153, Sec. 3(a)(2).

If both proposals are approved, then both study committees intend that the two new unified districts will be members of a new, enlarged supervisory union. Alternatively, if only the Central Vermont UUSD is approved, then that study committee would like the State Board to designate the UUSD as its own supervisory district. Given the contradictory nature of these two potential outcomes – and the uncertain governance decisions of other districts in the region – it would be premature at this time for the State Board either to define boundaries of an enlarged supervisory union or to agree that it would designate the Central Vermont UUSD as its own supervisory district. We advise the State Board to wait to evaluate these issues until after the governance structures in this region are clearer.

II. The Central Vermont Unified Union School District

The Joint Northfield / Williamstown 706 Study Committee proposes the creation of a UUSD that would provide for the PK-12 education of resident students by operating schools offering all grades (New Unified District) beginning on July 1, 2018.

¹ The Roxbury School District, which is the sole district in these two SUs not included in either proposal, is in conversations with the Montpelier School District to propose creation of a unified district that would operate all grades for students living in both communities. See the italicized paragraph on page 10 of the Joint Northfield / Williamstown 706 Study Committee’s Report for information regarding other discussions in the region.

The Study Committee identifies the following school districts as “necessary” to the proposal pursuant to 16 V.S.A. § 706b(b)(1): Northfield; Williamstown.

The Study Committee does not identify any school districts as “advisable” to the proposal pursuant to 16 V.S.A. § 701b(b)(2).

In FY2016, the combined PK-12 average daily membership (ADM) of the two “necessary” districts was 1,074.23 (Northfield: 574.07; Williamstown: 500.16) and the combined ADM of all five districts in the WSSU and the ONSU (including Roxbury) was 1,454.53.

If approved by the State Board, the electorate of each “necessary” district will vote on May 2, 2017 whether to approve creation of the New Unified District.

The New Unified District, which would be known provisionally as the Central Vermont Unified Union School District, would unify two existing PK-12 operating school districts into a single district responsible for operating all schools within the district and would replace two current governing bodies with one unified union school board.

The New Unified District would be governed by a unified school board of nine members, with five members initially allocated to Northfield and four members to Williamstown. Membership would be closely proportional to the towns’ relative populations and would be adjusted if necessary to reflect each decennial census. Each member would be elected by the voters of the town in which the member resides.

A school could be closed during the first four years of operation only if approved by the voters residing in the town in which it is located. In years five and after, a school could be closed upon (1) a 75% vote of the Unified District School Board after at least two public hearings and (2) subsequent ratification by the voters of the entire New Unified District.

If a school building is closed and would no longer be used for the direct delivery of student education programs, then the town in which the school building is located would have the right of first refusal and could purchase the property for \$1.00, provided that the town agreed to use the property for public and community purposes for a minimum of five years. The proposal includes provisions addressing use for these purposes for fewer than five years.

All future votes on the budget, Board membership, and other public questions would be by Australian ballot.

POLICY IMPLICATIONS: By enacting Act 46, which incorporated the provisions of Act 153 (2010), the General Assembly declared the intention to move the State toward sustainable models of education governance designed to meet the goals set forth in Section 2 of the Act. It was primarily through the lens of those goals that the Secretary has considered whether the Study Committee’s proposal is “in the best interests of the State, the students, and the school districts” pursuant to 16 V.S.A. § 706c.

The Northfield and Williamstown School Districts share “similar demographics, educational philosophies, and school structures. Furthermore, the districts have an established history of healthy athletic competition and educational collaboration.”

The Study Committee developed a comprehensive vision for a new unified union school district, identified guiding principles, and considered the “educational, cultural, financial, and operational opportunities and challenges.” When discussing its guiding principles, the Study Committee stated:

One of the central challenges of unification is recognizing the important relationship that community members have traditionally had with their local schools in conjunction with the responsibility of providing equitable opportunities for all students. In establishing these guiding principles of educational governance, the Committee is seeking to articulate what they believe to be a set of traditionally shared values that will foster confidence in each sending community concerning the new unified district’s educational operations and educational quality.

The Committee recommended a number of ways in which the New Unified District’s Board could work to create both (1) a “sense of community ownership, identity and culture” and (2) “budgetary processes that are responsive to the fiscal realities in both communities.”

The Study Committee reviewed and analyzed a wide variety of data including demographics, programmatic offerings, student assessments, debt, and costs per pupil. The Committee also modeled potential staffing changes in an enlarged, unified supervisory union.

The Committee identified current challenges in both districts, such as: substantive performance differences in student outcomes within schools and between schools; under-enrollment in core courses at both high schools; and a loss of elective courses due to spending pressures caused by declining enrollment.

The Committee also anticipated challenges that the New Unified District would face, including the current use of different structures for providing teacher support (coaching model v. expert teacher model) and the need to reconcile differences in spending and tax rates in a way that “both communities value and perceive as being in the best interest of everyone’s children.”

EDUCATION IMPLICATIONS:

The Study Committee identified a range of potential educational benefits of merger of the two districts and the two supervisory unions, including:

1. The ability to redirect resources in order to offer language programming in the lower grades
2. The creation of a “critical mass” of students across all grade levels to support program enrichment, rather than elimination
3. The ability to combine sections of some high school courses to optimize class sizes and eliminate duplicative programming
4. Increased options to maximize student access to opportunities, including:
 - a. Sharing teachers between schools
 - b. Creative scheduling (e.g., block scheduling) that allows students to travel between schools
 - c. Investing in technology to maximize distance learning opportunities

- d. Restructuring the high schools by, e.g., offering grades 9-10 in one building and 11-12 in the other
 - e. Creating specialized magnet schools
 - f. Creating one new, unified high school program
5. Increased stability in and ability to retain high quality staff by combining several part-time positions into one full-time position.

FISCAL IMPLICATIONS:

The Study Committee's report stated that consolidation of the two supervisory unions would streamline operations and reduce administrative redundancy. It identified potential ongoing Central Office savings of \$250,000 per year (in addition to the projected \$83,500 savings from the Orange Washington proposal).

In addition, it identified approximately \$300,000 in annual savings through better coordination of high school programming, which could be realized by eliminating course duplication (17.5 sections affected) and optimization of teaching resources (3.5 FTE).

Finally, the Study Committee projected an estimated 0.5% reduction in annual growth in spending due to maximizing operational efficiencies (e.g., large-scale purchasing, contract negotiations, and better asset coordination) that could equal approximately \$710,000 over a five year period.

See also Act 153, as amended, for cost implications to the State.

The Study Committee's proposal is aligned with the goals of the General Assembly as set forth in Act 46 of 2015 and with the policy underlying the union school district formation statutes as articulated in 16 V.S.A. § 701.

STAFF AVAILABLE:

Donna Russo-Savage, Principal Assistant to the Secretary,
School Governance
Brad James, Education Finance Manager

Type of Merger	
<i>Please refer to the related eligibility worksheets to determine baseline eligibility for each merger type.</i>	(column reserved for agency use)
<input type="checkbox"/> Accelerated Merger (Act 46, Section 6)	
A Regional Education District (RED) or one of its variations (Act 153 (2010) and Act 156 (2012)) <input checked="" type="checkbox"/> RED (Act 153, Secs. 2-3, as amended by Act 156, Sec. 1 and Act 46, Sec. 16) <input checked="" type="checkbox"/> Side by Side Merger (Act 156, Sec. 15) Districts involved in the related merger: <input type="checkbox"/> Layered Merger (Union Elementary School District) (Act 156, Sec. 16) <input type="checkbox"/> Modified Unified Union School District (MUUSD) (Act 156, Sec. 17, as amended by Act 56 (2013), Sec. 3)	
<input checked="" type="checkbox"/> Conventional Merger – merger into a preferred structure after deadline for an Accelerated Merger (Act 46, Section 7)	

Dates, ADM, and Name	
Date on which the proposal will be submitted to the voters of each district (16 V.S.A. § 706b(b)(11)): May 2, 2017	
Date on which the new district, if approved, will begin operating (16 V.S.A. § 706b(b)(12)): July 1, 2018	
Combined ADM of all “necessary” districts in the current fiscal year: 1074.23	
Proposed name of new district: Central Vermont Unified Union District (<i>provisional</i>)	

Please complete the following tables with **brief, specific** statements of how the proposed union school district will comply with the each of the listed items. *Bulleted statements are acceptable.*

The Proposed School District is in the Best Interest of the State, Students, and School Districts – as required by 16 V.S.A. § 706c		
<p>Goal #1: The proposed union school district will provide substantial equity in the quality and variety of educational opportunities.</p> <p><i>Act 46, Sec. 2(1)</i></p>	<p>A unified district with a combined and coordinated instructional approach would:</p> <ol style="list-style-type: none"> 1. Free up resources to: <ol style="list-style-type: none"> a. Extend Language programming to lower grades. b. Create more rigorous and robust academic program offerings throughout the district c. Enhance visual and performing arts programming (K-12). d. Strengthen before and after school enrichment opportunities, and summer programs. e. Expand outdoor/experiential learning programs. f. Coordinate and expand student-centered/non-traditional programming. (E.g. STAR - Students Taking Alternative Routes to graduation, Flexible Pathways, and Personalized Learning Plans) 2. Create a critical mass of elementary, middle, and high school students to support program enrichment across schools, both academic and co-curricular, rather than program elimination. 3. Through enhanced program coordination and community partnerships, strengthen student access to the full range of academic, social, and emotional supports currently offered by each school district. (E.g. Special Education, Multi-Tiered System of Support, Washington County Mental Health) 4. Extend opportunities for more students to get involved in programs that develop leadership skills. (examples – school board membership <p>In addition a sectioning analysis of high school courses offered by both districts revealed the capacity to combine sections in certain courses in order to optimize class sizes and an extensive duplication of course offerings in high school programming.</p> <p>The Committee concluded that real opportunities exist for exploring creative ways for restructuring current delivery models to optimize student access to existing programming. This could result in enhanced student/teacher ratios and</p>	

commensurate savings in current instructional costs that could be used to enhance and extend educational programming PreK-12 without additional taxpayer support. For example, programs offered in one high school but not in the other could result in increased educational opportunities for all students, through better scheduling and program coordination, the use of technology, and/or the restructuring of high school programs.

Over the course of its deliberations, the Committee examined a number of options that a unified school board could and should explore in greater depth that might maximize access by all students to the considerable educational opportunities offered throughout both districts.

These options included:

1. Maintaining existing programming at Northfield and Williamstown High Schools while maximizing existing teacher resources by sharing teachers between the schools.
2. Utilizing creative scheduling (e.g. Block schedules) that allow students to travel between schools.
3. Investing in technology to maximize distance learning opportunities. For example, offering web-based classes where teachers in one school offer joint courses with students in another school who are participating in the class electronically.
4. Restructuring both high schools to optimize program access for all students. For example, hosting grades 9/10 in one school and grades 11/12 in another.
5. Offering specialized Magnet schools with specialized programs to which students can choose to attend. For example, a STEM program at one school and an arts/music emphasis at the other.
6. Creating one new, unified high school program.

The Committee noted that there may be other restructuring alternatives, beyond the six that the Committee considered, that could and should be explored by a new, unified school board in greater depth and with greater opportunity for community input in order to decide which option(s), if any, might best meet the needs of students in Northfield and Williamstown.

For the Committee, the key point is that without merging, this or any other

	<p>future plan for creating greater educational opportunity through a more efficient sharing of existing resources is not possible.</p>	
<p><u>Goal #2:</u> The proposed union school district will lead students to achieve or exceed the State’s Education Quality Standards, adopted as rules by the State Board of Education at the direction of the General Assembly.</p> <p><i>Act 46, Sec. 2(2)</i></p>	<p>A unified district, led by a single school board would create new opportunities to:</p> <ol style="list-style-type: none"> 1. Learn from each other’s successes and failures and nurture a culture of innovation and experimentation. 2. Develop more effective district-wide, school improvement strategies grounded in a more comprehensive analysis of overall student progress that is only possible when looking at data from larger student cohorts. 3. Strengthen the design and delivery of high quality instruction in every classroom through curricula which is aligned with state standards and regularly informed through analysis of student performance data. 4. Strengthen the instructional practices of the entire system by creating a more extensive, robust, and coordinated program of teacher development that: <ol style="list-style-type: none"> a. Fosters opportunities to share expertise, best practice, diverse thinking, and new/emerging instructional visions (mentoring, teacher leadership). b. Assist teachers in creating learning environments which: <ol style="list-style-type: none"> i. Promote and support positive social responsibility through accountability and respect for self, others, and their school; ii. Embed transferable skills into their instruction and to include them in all summative assessments. iii. Implement personalized learning plans as a living document in a Proficiency Based Learning (PBL) system iv. Develop real-world projects, instructional challenges and solutions. 5. Expand our cultural traditions (musicals, arts nights, etc.) 6. Coordinate special education programs and resources enabling staff to focus their professional development and therefore their expertise on particular disabilities, assessments and/or interventions. This would increase our ability to meet the needs of students and our capacity to serve them locally. 7. Enhance the district’s ability to offer a wider array of interventions through Multi-Tiered System of Supports and other strategies. 8. Enhance the district’s capacity to hire and retain a highly qualified, stable corps of teachers by being able to offer long-term positions better sheltered from 	

	<p>fluctuations in enrollments, and/or fewer part-time positions by combining instructional needs into full-time positions across the new district.</p> <ol style="list-style-type: none"> 9. Expand instructional alternatives/programs for students aimed at reducing the current drop-out rate. 10. Create safer, more supportive school learning environments by unifying discipline policies and implementing successful intervention strategies across schools in order to foster stable and developmentally appropriate school cultures PK-12. (e.g. PBIS, School Community Mental Health Partnerships, etc.) 11. Optimize the use of existing resources by sharing instructional staff, creating greater student access to programming across the new district, restructuring existing delivery models to optimize class sizes and eliminate redundancy in instructional programs, particularly at the high school level – e.g. finding creative ways to consolidate, redundant and under-enrolled courses at both high schools 	
<p><u>Goal #3:</u> The proposed union school district will maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with a goal of increasing the district-level ratio of students to full-time equivalent staff.</p> <p><i>Act 46, Sec. 2(3)</i></p>	<p>During the course of its study, the Committee identified the following opportunities for achieving and sustaining financial and operational efficiencies through unification.</p> <ol style="list-style-type: none"> I. Unification of Central Office Services II. Coordinating the delivery of High School Programming III. State Tax Incentives over 4 years; Merger Implementation Grants IV. Large Scale Purchasing/Contract Negotiation with Private Vendors <ol style="list-style-type: none"> a. Technology b. Books & supplies c. Maintenance needs d. Food Services e. Transportation V. Shared Administrative, Staffing, and Service Delivery Models <ol style="list-style-type: none"> a. Coordinate teaching/staffing assignments (responding to changing school demographics, program, and building needs) b. Eliminate administrative redundancy 	

- c. Streamline existing service models (transportation, maintenance)
- d. Coordinate financial administration/reduce bureaucracy
 - i. Reduced number of audits
 - ii. Fewer board expenses - board services/support (stenographer, legal, dues, etc)
 - iii. Purchasing process
- e. Increase efficiency in state and federal data collection and reporting
- f. Coordinate use of facilities

VI. Further Collaboration of Special Education and Behavioral Management Services

- a. Review of out-of-house vs in-house delivery models and opportunities
- b. Alternative program delivery

VII. Asset Coordination

- a. Buildings and grounds
- b. Deferred maintenance
- c. Long-term capital planning

Specifically:

1. Unification of Central Office Services: \$232,500/year ongoing

The creation of a Side-by-Side Supervisory Union between Orange North and Washington South with the merging of two central offices into one, is estimated to save about \$334,000 union-wide. The projected savings for Washington and Orange in year one (ongoing) is approximately \$77,500 (25% of ADM) and the savings for Northfield and Williamstown in year one (ongoing) is approximately **\$232,500** (75% of ADM). The total over the first 5 years of operation of the new unified district: ~\$1,162,500

Potential Savings - Central Office Unification to Northfield/Williamstown:
~ \$232,500

2. Better Coordination of High School Programming: (See Appendix 5)

A sectioning analysis of high school courses offered by both districts revealed not only the capacity to combine sections in certain courses in order to optimize class sizes, but duplication of certain course offerings that if offered across both high schools would also result in an optimization of student/teacher ratios. In addition, programs offered in one high school but not in the other could, through scheduling **and** program coordination result in increased educational opportunities for all students.

If a creative approach to coordinating existing programs at the high school level were able to eliminate 100% of the current programmatic duplication and fully optimize existing teaching resources, the resultant ongoing savings would be approximately \$300,000 per year, which could be used for program development and/or tax relief.

Total "Savings" in Sections/Courses 17.5 sections
Total "Savings" in Teacher FTE" (Full Time Equivalent) 3.5 FTE
Total Dollars for Program Enhancement~ \$300,000

3. Additional Savings due to Maximizing Operational Efficiencies:

Identifying specific savings due to large scale purchasing, contract negotiation, and better asset coordination is difficult to predict. The financial model outlined in the next section approximates these savings and projects the impact on future tax rates of realizing a modest reduction in the annual growth of budget and educational spending over the next 6 years of .5% due to maximizing the operational efficiencies outlined in this section of report for a new unified district – that potential savings is estimated to be approximately ~\$142,000 in year one and approximately~ \$710,000 over the first 5 years of operation of the new unified district which could be used for program development and/or tax relief.

Impact of cutting annual growth in spending by .5% per year over 5 years = ~\$710,000

<p><u>Goal #4:</u> The proposed union school district will promote transparency and accountability.</p> <p><i>Act 46, Sec. 2(4)</i></p>	<p>A. Instructional:</p> <ol style="list-style-type: none"> 1. The new district will be able to: <ul style="list-style-type: none"> ○ Strengthen the utilization of data systems to assess instructional delivery models (K-12) by implementing a more cost effective approach to assessing student achievement that could be disaggregated in ways that would help the new district identify its core strengths and weaknesses. ○ Address any existing disparities in instructional delivery between and within classrooms throughout the district by implementing a systems approach to instructional improvement that is data driven, grounded in best practice, and supported by latest educational research. 2. Implement district-wide opportunities for recognizing and celebrating student accomplishments. <p>B. Fiscal/Operational:</p> <ol style="list-style-type: none"> 1. Consolidation of the Superintendent’s Office would streamline operations and reduce administrative redundancy: <ul style="list-style-type: none"> ○ Two current Superintendent positions and Directors of Special Services would be reduced to one, and office support staff would be reduced. <p><i>Note: Currently, both districts have already taken steps to achieve this goal by consolidating and sharing the positions of Business Manager and Curriculum Director, with good results for the schools and for the bottom line.</i></p> <ol style="list-style-type: none"> 2. A larger administrative unit creates efficiencies and economies of scale. <ol style="list-style-type: none"> a. We could purchase items and services in greater bulk at lower cost. b. We would be in a stronger position to negotiate contracts for bussing, food service, and other essential services. c. We could more efficiently offer professional development to teachers and staff. 	
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	<p>d. Increased opportunity to locally provide services in a more cost effective manner to students with intensive special needs.</p> <ol style="list-style-type: none"> 3. A merged district could take advantage of short-term state tax incentives to lower our tax rate, invest in one-time infrastructure/program enhancements that benefit students, or both. 4. The rate of increase in school budgets in both Williamstown and Northfield are projected to grow more slowly in unified district, even after tax incentives expire. 5. Having a larger pool of students allows us to meet students' educational needs and interests without cutting back programs or duplicating efforts. 6. The ability to share financial and personnel resources to address large and expensive projects. <p>Note: Among the fiscal and operational <u>challenges</u> facing a new, unified district are:</p> <ol style="list-style-type: none"> 1. Merging teacher and support staff contracts 2. Declining enrollment in both districts 3. Increased spending pressures in both districts 4. The existence at Williamstown Elementary School of two modular classroom structures, that while in excellent condition, will eventually need to be replaced depending on long term enrollment trends. 5. Reconciling existing differences in per pupil spending and tax rates in a manner that both communities value and perceive as being in the best interest of everyone's children. 	
<p><u>Goal #5:</u> The proposed union school district will deliver education at a cost that parents, voters, and taxpayers value.</p> <p><i>Act 46, Sec. 2(5)</i></p>	<p>The Committee believes that achieving this goal depends upon creating within the new unified district a sense of community ownership, identity and culture and budgetary processes that are responsive to the fiscal realities in both communities. To this end, the Committee recommends that the new Board work to:</p> <ol style="list-style-type: none"> 1. Structure school websites to promote a common identity and establish improved patterns of communication and outreach. 2. Coordinate community activities across schools so that certain functions could take place in one school but serve families from all schools. (Examples: District music concerts, district art shows, speakers, open 	

	<p>houses)</p> <ol style="list-style-type: none"> 3. Celebrate district-wide examples of educational progress and student achievement. 4. Explore ways to unify or coordinate PTA/parent council activities 5. Foster district-wide opportunities for outreach to community and municipal organizations and leadership groups. 6. Initiate regularly held committee meetings to facilitate community input and monitor the implementation of educational policy by administration (e.g. school-based councils, community forums, and open houses). 7. Explore creative governance structures that encourage non-voting, community representation and engagement on standing board committees in order to foster greater community input and engagement in the development of board policy. 	
<p><u>Regional Effects:</u></p> <p>What would be the regional effects of the proposed union school district, including: would the proposed union school district leave one or more other districts geographically isolated?</p> <p><i>Act 46, Section 8(a)(2)</i></p>	<p>As current members of both the Orange North Supervisory Union and the Washington South Supervisory Union it is the intention and hope of the Northfield/Williamstown Joint 706 Study Committee to form a new Regional Educational District variation, identified under Act 156 as a “Side-by-Side”, in conjunction with the PreK-8 tuition districts of Orange and Washington who are undertaking their own joint 706 process to determine whether they wish to merge together into a new unified union district.</p> <p>Finally, during the course of this committee’s deliberations, discussions were held with the Roxbury School district as to that district’s interest in becoming advisable to this process. It was the decision of the Roxbury school board to enter into direct deliberations concerning a potential merger with the Montpelier Public School District. In addition, inquiries were made by the Northfield School Board to be an advisable district in the Montpelier/Roxbury 706 process. In response to those inquiries, the Roxbury/Montpelier joint study committee repeated its desire to stay focused upon its 706 study with Roxbury. To our knowledge, all other neighboring districts are engaged in their own 706 studies and therefore were not part of this joint merger study.</p>	

Articles of Agreement – as required by 16 V.S.A. § 706b(b)(3) - (10), (13)

<p>(3) The grades to be operated by the proposed union school district</p> <p>The grades, if any, for which the proposed union school district shall pay tuition</p>	<p>PreK-12</p>	
<p>(4) The cost and general location of any proposed new schools to be constructed</p> <p>The cost and general description of any proposed renovations</p>	<p>No New Construction Planned or Anticipated</p>	
<p>(5) A plan for the first year of the proposed union school district's operation for:</p> <p>(A) the transportation of students</p> <p>(B) the assignment of staff</p> <p>(C) curriculum</p> <p>The plan must be consistent with existing contracts, collective bargaining agreements, and other provisions of law, including 16 V.S.A. chapter 53, subchapter 3 (transition of employees)</p>	<p>Upon an affirmative vote of the electorate in the Towns of Northfield and Williamstown on May 2, 2017 and certification of the final vote of each district by the Vermont Secretary of Education to the Vermont Secretary of State per 16 VSA § 706g, the new Central Vermont Unified Union School District would come into existence and have all of the authority necessary for it to prepare for full educational operations beginning on July 1, 2018.</p> <p>The Central Vermont Unified Union School District would, between the date of its first organizational meeting under 16 VSA – 706j and June 30, 2018, undertake all of the planning and related duties necessary to begin operations of the new unified union school district on July 1, 2018, including:</p> <ol style="list-style-type: none"> a. Preparing for and negotiating contractual agreements; b. Preparing and presenting a budget to the voters for fiscal year 2019; c. Preparing for the Central Vermont Unified Union School District annual meeting; d. Transacting any other lawful business that comes before the Board. <p>The authority exercised by new Central Vermont Unified Union School District</p>	

shall not limit or alter the ongoing authority and/or responsibilities of the school boards that make up the current districts of Northfield and Williamstown which will remain in existence during the transition period for the purpose of completing any and all business not given under law to the new unified union district board. In essence, each individual district board would maintain its current authority until the new district becomes operational on July 1, 2018. The existing districts and supervisory union will remain in operation after July 1, 2018 only to conclude any business.

In summary, an affirmative vote of the electorate in both Northfield and Williamstown would also result in, but not be limited to, the following:

- a. Employees throughout the current individual school districts (Northfield and Williamstown) offered continuing employment following the 2017-2018 school year, consistent with all legal requirements, would become employees of the new Central Vermont Unified Union School District.
- b. All assets of the pre-existing districts would be transferred to the new unified union district for the sum of \$1.00 as of July 1, 2018.
- c. Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the new unified union district as of July 1, 2018.
- d. Following the certification of the election results by the Agency of Education to the Secretary of State (30-45 days after the vote), an organizational meeting of the new unified district would be convened by the Secretary of the Agency of Education or designee in accordance with Title 16, 706j.
- e. The newly elected members of the Central Vermont Unified Union School District, consistent with statute, would begin the work of preparing for the district's first day of operations - hiring a superintendent in conjunction with the other unified districts making up the new Supervisory Union, defining administrative and operational roles and responsibilities, establishing policy, negotiating contracts, developing budgets, and establishing new structures for community engagement.
- f. Through June 30, 2018, the two pre-existing boards of the supervisory union would continue to govern their respective districts and/or schools. The existing districts and supervisory union will remain in operation after July 1, 2018 only to

	conclude any business.	
(6) The indebtedness of the proposed merging districts that the proposed union school district shall assume.	<p><u>Long term Debt:</u> Northfield has \$236,000 in long term debt - Principal only through 2029. Williamstown has \$3,095,000 - Principal only through 2026.</p> <p><u>Short Term Debt:</u> Both school districts took out Tax Anticipation Notes (TAN's) on July 1st.</p> <ul style="list-style-type: none"> • Williamstown - \$2,000,000 • Northfield - \$2,900,000 	
(7) The specific pieces of real property owned by the proposed merging districts that the proposed union school district shall acquire, including: <ul style="list-style-type: none"> * their valuation * how the proposed union school district shall pay for them 	See Final Report Appendix 4	
(8) <i>[repealed 2004 Acts and Resolves No. 130, Sec. 15]</i>		
(9) Consistent with the proportional representation requirements of the Equal Protection Clause, the method of apportioning the representation that each proposed member town shall have on the proposed union school board <ul style="list-style-type: none"> * no more than 18 members total * each member town is entitled to at least one representative * <i>see also</i> 16 V.S.A. § 706k(c): one or more at-large directors 	<p>Article 8. Board of School Directors Representation</p> <p>The Central Vermont Unified Union District Board of Directors shall be composed of nine (9) individuals elected by Australian ballot by the voters of the municipalities in which they reside. Each municipality within the Unified District shall be guaranteed at least two resident representatives.</p> <p>Based on the 2010 census, the new unified union board will consist of five (5) representatives residing in and representing Northfield; and four (4) residing in and representing Williamstown.</p> <p>The Northfield and Williamstown ratio of directors are consistent with current census figures. specific numbers of directors allocated to each municipality shall be</p>	

<p>* <i>see also</i> 16 V.S.A. § 707(c): weighted voting</p>	<p>aligned to the new counts if necessary.</p>													
<p>(10) The term of office of directors initially elected, to be arranged so that one-third expire on the day of each annual meeting of the proposed union school district, beginning on the second annual meeting, or as near to that proportion as possible</p>	<p>Article 9: Initial Directors Terms of Office</p> <p>School Directors will be elected by Australian ballot for three year terms, except for those initially elected at the time of the formation of the new Central Vermont Unified Union School District. In the initial election of School Directors, the terms of office will be as follows:</p> <table border="1" data-bbox="705 506 1772 657"> <thead> <tr> <th>Town</th> <th>Term ending March 2019</th> <th>Term ending March 2020</th> <th>Term ending March 2021</th> </tr> </thead> <tbody> <tr> <td>Northfield</td> <td>2</td> <td>1</td> <td>2</td> </tr> <tr> <td>Williamstown</td> <td>1</td> <td>2</td> <td>1</td> </tr> </tbody> </table> <p>The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting in 2018.</p>	Town	Term ending March 2019	Term ending March 2020	Term ending March 2021	Northfield	2	1	2	Williamstown	1	2	1	
Town	Term ending March 2019	Term ending March 2020	Term ending March 2021											
Northfield	2	1	2											
Williamstown	1	2	1											
<p>(13) Any other matters that the study committee considers pertinent, including whether votes on the union school district budget or public questions shall be by Australian ballot</p> <p><i>(please list each matter separately)</i></p>	<p>Article 12. Australian Ballot Voting</p> <p>The Central Vermont Unified Union School District shall vote the annual school district budget and public questions by Australian ballot. All votes shall be comingled prior to the count.</p> <p>Article 13. Restructuring a School</p> <p>Any proposal to restructure the current grade configurations of one or more of the district's current schools will require an affirmative vote by a majority of the Board of Directors and a robust and transparent process of public hearings, discussion and input. Prior to holding a vote on restructuring, the Board shall hold at least two public hearings regarding the district's proposed educational plan and delivery model, in each of the forming towns. After conducting public hearings, the Board of Directors shall give notice of its intent to hold a vote on any restructuring plan at least thirty days prior to a meeting warned for that purpose, stating the reasons/rationale for its recommendations.</p>													

Article 14. Closing a School

The new Central Vermont Unified Union District Board shall not close any school conveyed to the new unified union district by a forming town within the first four (4) years of operation of the new unified union district unless approved by the voters in the town where the school is located.

Thereafter, an affirmative vote by 3/4 the Board of Directors shall be required to close a school. Prior to holding a vote on whether to close a school, the Board shall hold at least two public hearings regarding the proposed school closure. At least one of the public hearings shall be held in the community in which the school is located. If after conducting public hearings, the Board of Directors intends to vote on whether to close a school, it shall give public notice of its intent to hold a vote on whether to close a school, stating the reason for the closure, at least 30 days prior to the vote.

If the Board votes to close a school, a binding referendum to that effect shall be submitted to an annual or special meeting for approval by the voters of the Unified Union School District. The closing shall become effective only if approved by a majority of the electorate voting by Australian ballot. The votes shall be commingled and approval of the referendum shall require a majority of all those voting.

Article 15. Community Engagement

Community connections to local schools are celebrated and cherished. Each community feels that schools are the heart of the community and values and supports equitable and quality public education for their children. The new unified union board shall provide timely and sufficient opportunity for local input on policy and budget development. Structures to support and encourage public participation within the new unified union district will be established by the new unified union board of school directors on or before **July 1, 2018**. These structures may include local school councils that have an advisory responsibility in key areas, including but not limited to new unified union district's budget development and hiring of principals. Local school councils or

school advisory committees may be considered whose purpose is to serve as building-based councils or teams that operate in an advisory capacity.

Article 16. Redistricting/Intra-district School Choice

For the first year of the operation of the new Central Vermont Unified Union School District, students will attend school in their current town of residency; provided however with parental consent, the Board may adjust student enrollment based upon individual circumstances and the needs of the unified union district. After the first year, the new unified school board will have the authority to adjust school attendance boundary lines with a 3/4 vote of the Board.

Students and their families may voluntarily request assignment at another school, according to policies on intra-district choice established by the Board.

Article 17. Renaming the New District

It is understood that the current name for the new unified union district, the “Central Vermont Unified Union School District,” is provisional for the purposes of legal identification in these articles and may be changed by a majority vote of school directors of the new unified union school district.

**CENTRAL VERMONT
UNIFIED UNION SCHOOL DISTRICT
ACT 46 STUDY COMMITTEE – FINAL REPORT
MARCH 14, 2017**

Northfield and Williamstown Act 46/706 Study Members

Committee Members

Rama Schneider - Chair

Williamstown

Peter Evans - Vice Chair

Northfield

Monique Hayden - Clerk

Williamstown

Patricia Coppolino

Northfield

Emily Gray

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Administrative and Consultant Support

Laurie Gossens: Superintendent, Washington South

Susette Bollard: Superintendent, Orange North

Chris Lacarno – Business Manager, Orange North/Washington South

Michaela Martin – Curriculum Coordinator, Orange North/Washington South

Peter Clarke: Consultant, Act 46 Project

EXECUTIVE SUMMARY

Act 46 is a far-reaching law with ambitious objectives to improve student outcomes, create equity in the quality and variety of student opportunity, increase transparency of school operations, and reduce overall education costs. At its heart, the law seeks to address these issues through the lever of simplified and unified governance mechanisms at the district level – in other words, the creation of a single board with a unified budget, accountable for the outcomes of all the students in the district.

As this study committee confronted the questions raised by this law, we spent a lot of time defining the educational aspirations of the communities we have been charged to represent while also trying to understand how we could best structure ourselves to achieve those goals, as well as, the goals of the law. After a careful study of the educational programs currently offered by both school districts, the Committee believes that there are real opportunities for reorganizing the delivery of educational services, particularly at the high school level, that would enhance instruction, better serve students, and create operational savings that could be used to strengthen and enhance existing programs (PK-12) without additional support from taxpayers.

Throughout the course of this study, the Committee has been able to identify real opportunities through unifying our respective districts to:

- Offer our high school students the classes that they need but might not be able to currently deliver given the existing distribution resources. In addition to expanding our course offerings, reducing course redundancy between our two existing programs of study will create optimized class sizes and more diverse classroom experiences. Williamstown students will also benefit from the pre-established relationship between Norwich and the Northfield school district.
- Share learning techniques between schools. Our communities are blessed with two fine elementary schools with complimentary but unique instructional approaches. Merger would facilitate real opportunities to share staff and best practices that would strengthen the instructional quality of both schools.
- Effectively utilize the capital and human resources of a larger district while maintaining the ability of a small district to quickly innovate and adapt to changing circumstances without bureaucratically generated delays.
- Reduce operational costs by consolidating the administration of two supervisory unions into one central office along with the capacity to more effectively scale our contracted

services and bulk purchasing and redirecting those expenditures into direct services to our students.

- Create a more sustainable future for the educational programs (PreK-12) in both communities, ensuring educational opportunity and a culturally rich town life for all our citizens by creating a more stable base of financial support. In addition, larger student populations are less prone to the negative impacts of enrollment fluctuations and the commensurate challenge of creating budgets to address both their needs and the needs of citizens and taxpayers.

In the course of its deliberations, the Committee also came to appreciate the close affinity that already exists between our two communities. We share similar demographics, educational philosophies, and school structures. Furthermore, the districts have an established history of healthy athletic competition and educational collaboration. Essential to the success of this plan will be building upon that solid foundation to create a new, unified sense of community identity and culture within the new district. We see merging the educational interests and aspirations we all share as an important step into a future shaped by our communities working together for the benefit of all our children.

Finally, we believe ensuring a vibrant and innovative school system, a place where young families will to set down roots and educate their children, is the best path forward to maintaining the economic and cultural vitality of our two communities.

LAWYERS CERTIFICATION LETTER

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March 14, 2017

Stephan Morse, Chair
Vermont Board of Education
219 North Main Street, Suite 402
Barre, VT 05641

Rebecca Holcombe, Secretary
Vermont Agency of Education
219 North Main Street, Suite 402
Barre, VT 05641

RE: Proposed Central Vermont Unified Union School District

Dear Board Chair Morse and Secretary Holcombe:

This office represents the Washington South Supervisory Union and its member district the Northfield School District, together with the Orange North Supervisory Union and its member district, the Williamstown School District. This letter is written on behalf of the Northfield-Williamstown Act 46 Study Committee which is recommending formation of a unified union district consisting of the Northfield School District and the Williamstown School District.

I am writing to address the constitutionality of board member allocation among the two towns that will be members of the proposed Central Vermont Unified Union School District. The Articles of Agreement provide for formation of a nine (9) member governing board with members having equal (non-weighted) votes. Using the most recent census data, board members will be allocated to the town on the basis of population. The initial allocation is for the Town of Northfield to have five (5) members and the Town of Williamstown to have four (4) members.

Elected governmental boards are to be composed of members, who, ideally, represent similar numbers of constituents, based on population, to meet the Equal Protection Clause of the U.S. Constitution. The combined population of the two member town of the Central Vermont Unified Union School District is 9596, based on the most recent census numbers. Each member of the nine-member board would represent a population of 1066, under an ideal calculation. The population of the Town of Northfield is 6207, while the population of the Town of Williamstown is 3389.

ZALINGER CAMERON & LAMBEK, P.C.

Board Chair Morse and Secretary Holcombe
 March 14, 2017
 Page Two

The proposed allocation results in the following representational proportions:

		Pop. Per Member	Deviation from Ideal 1066
Northfield	5	1241	-16%
Williamstown	4	847	+ 20%

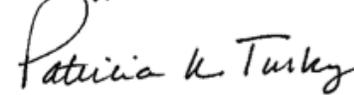
The maximum deviation is 36%. The U.S. Supreme Court has recognized that a level of deviation from the ideal is permissible, where the allocations are made to preserve representations along historic political boundaries such as cities, towns and counties. *Brown v. Thomson*, 462 U.S. 835 (1983). In that case, the Court addressed Wyoming's 1981 legislative reapportionment. The "ideal" population per representative was 7,337, but deviations along some county lines were more than 50%. The Court accepted the proposed apportionment as constitutional because of the importance of preserving the county boundary.

The important role of Vermont towns in the organization and governance of their public schools is found in the Vermont Constitution which provides that "... a competent number of schools ought to be maintained in each town . . ." (Section II, Section 68). Vermont law also requires that school district boards meet the proportionality requirements of the Equal Protection Clause of the U.S. Constitution (16 V.S.A. 706b(b)(9)). Town members have traditionally had an important relationship with their local schools, evidenced by their long-standing financial and support. The allocation of the board members of the proposed district preserves the policy of local structure within established political boundaries, given the preferred size of the board.

The proposed board member allocation meets the constitutional standards of the U.S. Constitution. The maximum population deviation of 35% is far smaller than the deviations accepted in *Brown v. Thomson*. Preservation of the political boundaries is significant, within the preferred board size.

It is my opinion that the method for allocating the nine members of the proposed board satisfies the requirements of the Equal Protection Clause of the U.S. Constitution and the laws of the State of Vermont.

Sincerely,



Patricia K. Turley

cc: Laurie Gossens, WSSU Superintendent
 Susette Bollard, ONSU Superintendent

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NORTHFIELD/WILLIAMSTOWN DISTRICT UNIFICATION

Overview:

Act 46 is a far-reaching piece of legislation designed to encourage school districts throughout Vermont to explore the potential benefits of unifying their existing governance structures into unified school boards responsible for serving, in this study, every student in the current Northfield and Williamstown School Districts. It is a bill whose central goal is improving the educational quality of the schools that make-up these two districts and to achieve that goal at an affordable and sustainable cost that taxpayers will value.

At the heart of the law are five key goals which the committee saw as essential guides to their work:

- *To provide substantive equity in the quality and variety of educational opportunities statewide.*
- *To lead students to achieve or exceed the State's Educational Quality Standards.*
- *To 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*
- *To promote transparency and accountability.*
- *To achieve these goals at a cost that parents, voters, and taxpayers value.*

In examining the best way to achieve these goals, the committee considered the educational, cultural, financial, and operational opportunities and challenges, that would attend any plan for a PK-12 unification of the Northfield and Williamstown school systems.

Specifically, the Committee identified and examined:

- The Central Questions Guiding their Study of Unification
- The Opportunities and Challenges of Unification - Educational, Cultural, Financial, and Operational
- Current Enrollment and Staffing Patterns in the Schools in Each District, with an eye towards identifying opportunities to expand/enhance instructional opportunities and create better, more cost-effective delivery models.
- Current student performance data in both districts.
- The Program and Curricular opportunities currently offered by both districts
- The Financial/Tax implications of a merger between Northfield and Williamstown, including the impact of potential incentives under the law, and the potential loss of hold harmless funds and small school grants.

Having completed this analysis, the Committee's Final Report seeks to outline:

- A. An Educational Vision for Unification** that would address the specific goals of Act 46. and provide voters with concrete examples of how a unified district might in fact operate, and the opportunity to evaluate specific initiatives that might better address the educational needs of students (PreK-12) in both districts. That vision includes:
- A Comprehensive Vision for a new Unified Union,
 - A Statement of Guiding Principles for Unification.
 - An Analysis of Student Performance/Achievement
 - An Analysis of Current Program Offerings Across the Supervisory Union.
 - An Analysis of Potential Reorganizational Strategies for Delivering a Quality Education for Every Student.
 - Recommendations for Fostering Community Ownership, Identity and Culture in a Merged District.
- B. Opportunities for promoting Operational Efficiency, Consistency, Transparency, and Accountability.**
- C. A plan for Maximizing Efficiencies** through Financial Accounting, Budgeting, and Administration.
- D. A Model that Projects the Potential Trend Lines in Homestead Tax Rates** due to unification.
- E. A Transition Plan** should the voters approve the proposed plan for district unification.
- F. Specific Articles of Agreement** for consideration by the voters of Northfield and Williamstown as required by law.

Throughout its deliberations, the central questions at the heart of our study committee process has been:

How would unification benefit our children? Specifically, how would a new, unified district governance structure provide better, more equitable instructional opportunities and better support students to achieve or exceed the State's Educational Quality Standards?

We believe the report that follows, **An Educational Vision for Unification**, is our best answer to this important question.

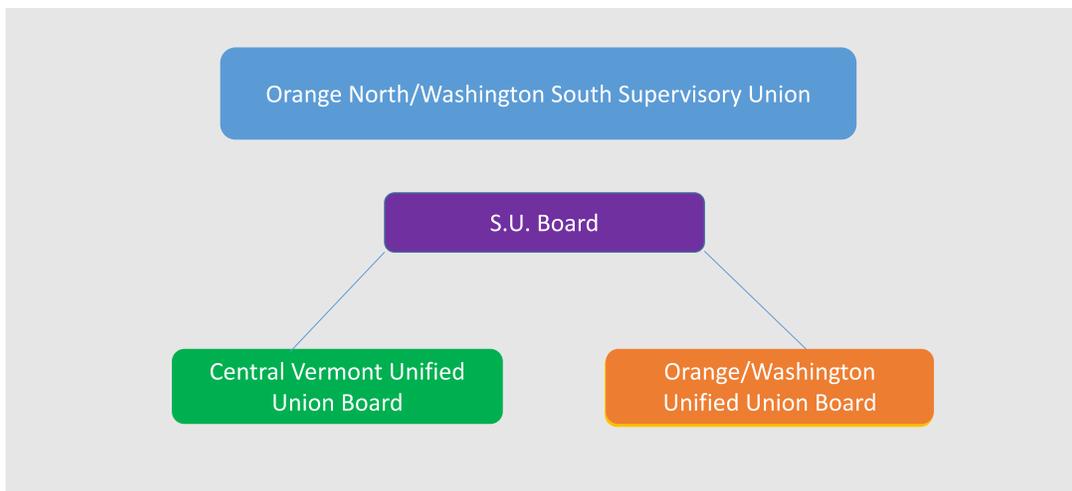
FINAL NOTE: NEIGHBORING DISTRICTS:

As current members of both the Orange North Supervisory Union and the Washington South Supervisory Union it is the intention and hope of the Northfield/Williamstown Joint 706 Study Committee to form a new Regional Educational District variation, identified under Act 156 as a “Side-by-Side”, in conjunction with the PreK-8 tuition districts of Orange and Washington who are undertaking their own joint 706 process to determine whether they wish to merge together into a new unified union district.

A “Side-by-Side” Regional Education District (R.E.D) under Act 156 is a supervisory union district formed by the union of two (or more) PreK-12 operating Districts (Northfield and Williamstown) and two (or more) similarly structured tuition districts (Orange and Washington) and is eligible to receive incentives under the law.

If the communities of Orange and Washington vote to form a unified union district and the communities of Northfield and Williamstown vote to approve their own separate unified union district, under the law, a new Supervisory Union could be formed taking the place of the existing Orange North and Washington South Supervisory Unions. The new supervisory union would result in the consolidation of two existing administrative central offices currently serving two separate Supervisory Unions, resulting in the creation of a single central office serving both new unified union school districts.

Side-By-Side Governance Model



It is the recommendation of the Committee that should the Orange and Washington unified union fail to be approved by voters, that the unification of Northfield and Williamstown into a single unified union district under the governance of a single school board proceed as a Phase 3

“Conventional Merger” under the law, given the real educational, operational, and fiscal benefits outlined in this report.

If the Orange-Washington proposal fails and the Northfield-Williamstown proposal is approved, then the new unified district would be eligible for tax rate reductions as a Conventional Merger pursuant to Act 46, Sec. 7. Under current law, however, a Conventional Merger is not eligible for a \$150,000 Transition Facilitation Grant. If this situation occurs and if the Legislature does not amend the Conventional Merger legislation to include the Grant, then the Joint Northfield/Williamstown 706 Study Committee will request that the State Board grant the unified district a waiver of the minimum ADM requirements for eligibility under Act 153, Sec. 3 (Phase 2 Merger - RED)

If such an outcome were to come to pass, the new unified district also requests that the State Board of Education also designate the new unified union district as a supervisory district rather than a supervisory union.

Final Note: During the course of this committee’s deliberations, discussions were held with the Roxbury School district as to that district’s interest in becoming advisable to this process. It was the decision of the Roxbury school board to enter direct deliberations concerning a potential merger with the Montpelier Public School District. In addition, inquiries were made by the Northfield School Board to be an advisable district in the Montpelier/Roxbury 706 process. In response to those inquiries, the Roxbury/Montpelier joint study committee repeated its desire to stay focused upon its 706 study with Roxbury. To our knowledge, all other neighboring districts are engaged in their own 706 studies and therefore were not part of this joint merger study.

PART A: AN EDUCATIONAL VISION FOR UNIFICATION

Introductory Note:

A fundamental understanding inherent in this report is that any new unified board will seek to implement key provisions of the Committee's findings/vision to insure the realization of these principles and to keep faith with expressed wishes of voters who voted for unification based on the vision expressed in this report.

VISION STATEMENT:

"A unified school district that promotes excellence in educational outcomes and cultural experiences for every student by maintaining and expanding access to innovative, high-quality programs while serving as wise stewards of community resources."

SECTION 1: GUIDING PRINCIPLES FOR UNIFICATION

One of the central challenges of unification is recognizing the important relationship that community members have traditionally had with their local schools in conjunction with the responsibility of providing equitable opportunities for all students. In establishing these guiding principles of educational governance, the Committee is seeking to articulate what they believe to be a set of traditionally shared values that will foster confidence in each sending community concerning the new unified district's educational operations and educational quality.

Educational/Operational Principles:

Equity: Equity means having access to multiple learning opportunities that will provide for the highest level of individual student achievement as measured by state standards and locally defined goals. Access to learning opportunities may include intra-district school choice, flexible learning pathways, access to college level courses, and other methods of providing district-wide programming. Achieving the goal of equity means increasing opportunity for all, not reducing existing opportunities in the name of equality.

Student Achievement: The outcome of student achievement will exceed state standards and local goals by addressing the specific needs of all students. Learning goals, as measured by multiple forms of assessment, can best be achieved by providing high quality instruction, personalized learning plans, enhanced learning opportunities, and innovative programming.

Maximizing Efficiencies: Maximizing efficiency in a unified district means optimizing class sizes, reducing duplication, and consolidating operational services through thoughtful planning and innovative programming. Organizational decisions will be practical, sustainable, and based upon sound and innovative educational practices.

Promoting Transparency and Accountability: A new, unified board will provide extensive opportunities for community involvement in all matters that come before the board including: educational vision and goals, district policy, budget development, and assessment of student progress.

Effective use of Resources: The unified board will use resources, including tax dollars, to develop and sustain educational programs that the community values and supports.

Innovation:

We expect leadership that fosters instructional innovation designed to address the ongoing and emerging needs of students throughout the district within the context of school cultures that preserve and build upon valued traditions and established best practices.

Community Identity:

A new, unified district will work to preserve and enhance the deep historical connection that community members feel to their local schools. Community engagement in our schools is essential to their long-term growth and success.

Holistic Learning:

Real mastery in learning can only be achieved through instructional practices that foster in every child a love of learning, that put students at the center of their own educational journey and actively engage them in meaningful and rigorous, hands-on experiences.

Student Leadership:

Schools should be places that foster leadership, that encourage and empower students and educators to bring out the best in each other. Together, we will create actionable opportunities for young people to contribute meaningfully to their school and to their communities.

Communication:

School and community leaders will create a sense of pride in our schools by communicating the scope and direction of the work being undertaken to create great schools, promoting what is unique and special about our district's educational programs, and celebrating our students' progress and success – making our community a place where parents want to live and raise a family.

Sense of Place:

Our educational programs should be rooted in and built upon on what makes our communities special – our heritage, our land, our love and concern for each other. We desire educational programs that connect our students to the world around them and that extend and enhance their learning and life experience through strong, vibrant school/community partnerships and place-based learning.

Section 2: Strengthening Student Performance & Programmatic Opportunity

Introduction:

In approaching the issue of strengthening the educational programs in a unified district, the Committee looked at the goal of achieving educational excellence in two ways:

- a. Programmatic Opportunity – The equitable access for students to a broad range of program opportunities across all the schools in the district.
- b. Performance – Student achievement in relation to state and local goals/standards.

A. Goal: Strengthening Student Achievement/Performance:

The Committee found that there are real performance differences in student outcomes within schools and between schools in both the Northfield and Williamstown school districts. ***[See Student Achievement Data, Appendix 7]***

Closing existing gaps in student performance between and among students and schools across both districts, as well as raising the overall level of student achievement to exceed existing state and local performance expectations is central to achieving the vision of a vibrant, unified school district expressed earlier in this report.

The Committee found that unifying the districts of Northfield and Williamstown will provide new and substantive opportunities for better addressing both the existing and emerging needs of our students, as well as, achieving the educational goals of Act 46. Taken together, every rationale expressed in this study and recommendation for changes in current practice are designed to achieve the goal of increasing student performance in our two communities.

A unified district, led by a single school board would create new opportunities to:

1. Learn from each other's successes and failures and nurture a culture of innovation and experimentation.
2. Develop more effective district-wide, school improvement strategies grounded in a more comprehensive analysis of overall student progress that is only possible when looking at data from larger student cohorts.
3. Strengthen the design and delivery of high quality instruction in every classroom through curricula which is aligned with state standards and regularly informed through analysis of student performance data.
4. Strengthen the instructional practices of the entire system by creating a more extensive, robust, and coordinated program of teacher development that:

- a. Fosters opportunities to share expertise, best practice, diverse thinking, and new/emerging instructional visions (mentoring, teacher leadership).
- b. Assist teachers in creating learning environments which:
 - i. Promote and support positive social responsibility through accountability and respect for self, others, and their school;
 - ii. Embed transferable skills into their instruction and to include them in all summative assessments.
 - iii. Implement personalized learning plans as a living document in a Proficiency Based Learning (PBL) system
 - iv. Develop real-world projects, instructional challenges and solutions.
5. Expand our cultural traditions (musicals, arts nights, etc.)
6. Coordinate special education programs and resources enabling staff to focus their professional development and therefore their expertise on particular disabilities, assessments and/or interventions. This would increase our ability to meet the needs of students and our capacity to serve them locally.
7. Enhance the district's ability to offer a wider array of interventions through Multi-Tiered System of Supports and other strategies.
8. Enhance the district's capacity to hire and retain a highly qualified, stable corps of teachers by being able to offer long-term positions better sheltered from fluctuations in enrollments, and/or fewer part-time positions by combining instructional needs into full-time positions across the new district.
9. Expand instructional alternatives/programs for students aimed at reducing the current drop-out rate.
10. Create safer, more supportive school learning environments by unifying discipline policies and implementing successful intervention strategies across schools to foster stable and developmentally appropriate school cultures PK-12. (e.g. PBIS, School Community Mental Health Partnerships, etc.)
11. Optimize the use of existing resources by sharing instructional staff, creating greater student access to programming across the new district, restructuring existing delivery models to optimize class sizes and eliminate redundancy in instructional programs, particularly at the high school level – e.g. finding creative ways to consolidate, redundant and under-enrolled courses at both high schools

Among the instructional challenges to be faced by a unified district are:

1. The current use of different structures for providing teacher support. Northfield uses a coaching model and Williamstown uses an expert teacher model. These differing approaches will need to be reviewed, coordinated and/or aligned.
2. Declining enrollment in both districts that result in ongoing spending pressures to maintain instructional opportunity in both districts.
3. Finding cost effective strategies to support multiple pathways at the high school level (e.g. community based learning, mentors, dual enrollment, career tech.)
4. Under-enrolled core courses currently offered at both high schools and the ongoing loss of elective courses in both schools.

SECTION 2: ENHANCING PROGRAMMATIC OPPORTUNITY

A unified district with a combined and coordinated instructional approach would:

1. Free up resources to:
 - a. Extend Language programming to lower grades.
 - b. Create more rigorous and robust academic program offerings throughout the district
 - c. Enhance visual and performing arts programming (K-12).
 - d. Strengthen before and after school enrichment opportunities, and summer programs.
 - e. Expand outdoor/experiential learning programs.
 - f. Coordinate and expand student-centered/non-traditional programming. (E.g. STAR - Students Taking Alternative Routes to graduation, Flexible Pathways, and Personalized Learning Plans)
2. Create a critical mass of elementary, middle, and high school students to support program enrichment across schools, both academic and co-curricular, rather than program elimination.
3. Through enhanced program coordination and community partnerships, strengthen student access to the full range of academic, social, and emotional supports currently offered by each school district. (E.g. Special Education, Multi-Tiered System of Support, Washington County Mental Health)
4. Extend opportunities for more students to get involved in programs that develop leadership skills. (examples – school board membership)

SECTION 3: OPPORTUNITIES FOR PROGRAM REORGANIZATION TO STRENGTHEN TEACHING AND LEARNING

A sectioning analysis of high school courses offered by both districts revealed the capacity to combine sections in certain courses to optimize class sizes and an extensive duplication of course offerings in high school programming. (**Appendix 5**).

The Committee concluded that real opportunities exist for exploring creative ways for restructuring current delivery models to optimize student access to existing programming. This could result in enhanced student/teacher ratios and commensurate savings in current instructional costs that could be used to enhance and extend educational programming PreK-12 without additional taxpayer support. For example, programs offered in one high school but not in the other could result in increased educational opportunities for all students, through better scheduling **and** program coordination, the use of technology, and/or the restructuring of high school programs.

Over the course of its deliberations, the Committee examined a number of options that a unified school board could and should explore in greater depth that might maximize access by all students to the considerable educational opportunities offered throughout both districts.

These options included:

1. Maintaining existing programming at Northfield and Williamstown High Schools while maximizing existing teacher resources by sharing teachers between the schools.
2. Utilizing creative scheduling (e.g. Block schedules) that allow students to travel between schools.
3. Investing in technology to maximize distance learning opportunities. For example, offering web-based classes where teachers in one school offer joint courses with students in another school who are participating in the class electronically.
4. Restructuring both high schools to optimize program access for all students. For example, hosting grades 9/10 in one school and grades 11/12 in another.
5. Offering specialized Magnet schools with specialized programs to which students can choose to attend. For example, a STEM program at one school and an arts/music emphasis at the other.
6. Creating one new, unified high school program.

The Committee noted that there may be other restructuring alternatives, beyond the six that the Committee considered, that could and should be explored by a new, unified school board in greater depth and with greater opportunity for community input to decide which option(s), if any, might best meet the needs of students in Northfield and Williamstown.

The Committee will submit articles of merger that will guarantee a robust and transparent public process for any restructuring of educational delivery.

For the Committee, the key point is that without merging, this or any other future plan for creating greater educational opportunity through a more efficient sharing of existing resources is not possible.

SECTION 4: PROVIDING A QUALITY EDUCATION AT A COST THAT PARENTS, VOTERS, AND TAXPAYERS VALUE

The Committee believes that achieving this goal depends upon creating within the new unified district a sense of community ownership, identity and culture and budgetary processes that are responsive to the fiscal realities in both communities. To this end, the Committee recommends that the new Board work to:

1. Structure school websites to promote a common identity and establish improved patterns of communication and outreach.
2. Coordinate community activities across schools so that certain functions could take place in one school but serve families from all schools. (Examples: District music concerts, district art shows, speakers, open houses)
3. Celebrate district-wide examples of educational progress and student achievement.
4. Explore ways to unify or coordinate PTA/parent council activities
5. Foster district-wide opportunities for outreach to community and municipal organizations and leadership groups.
6. Initiate regularly held committee meetings to facilitate community input and monitor the implementation of educational policy by administration (e.g. school-based councils, community forums, and open houses).
7. Explore creative governance structures that encourage non-voting, community representation and engagement on standing board committees to foster greater community input and engagement in the development of board policy.

Part B: Promoting Operational Efficiency, Consistency, Transparency, and Accountability

A. Instructional:

1. The new district will be able to:
 - Strengthen the utilization of data systems to assess instructional delivery models (K-12) by implementing a more cost-effective approach to assessing student achievement that could be disaggregated in ways that would help the new district identify its core strengths and weaknesses.
 - Address any existing disparities in instructional delivery between and within classrooms throughout the district by implementing a systems approach to instructional improvement that is data driven, grounded in best practice, and supported by latest educational research.
2. Implement district-wide opportunities for recognizing and celebrating student accomplishments.

B. Fiscal/Operational:

1. Consolidation of the Superintendent's Office would streamline operations and reduce administrative redundancy:
 - Two current Superintendent positions and Directors of Special Services would be reduced to one, and office support staff would be reduced.

Note: Currently, both districts have already taken steps to achieve this goal by consolidating and sharing the positions of Business Manager and Curriculum Director, with good results for the schools and for the bottom line.

2. A larger administrative unit creates efficiencies and economies of scale.
 - a. We could purchase items and services in greater bulk at lower cost.
 - b. We would be in a stronger position to negotiate contracts for bussing, food service, and other essential services.
 - c. We could more efficiently offer professional development to teachers and staff.
 - d. Increased opportunity to locally provide services in a more cost-effective manner to students with intensive special needs.
3. A merged district could take advantage of short-term state tax incentives to lower our tax rate, invest in one-time infrastructure/program enhancements that benefit students, or both.
4. The rate of increase in school budgets in both Williamstown and Northfield are projected to grow more slowly in unified district, even after tax incentives expire.

5. Having a larger pool of students allows us to meet students' educational needs and interests without cutting back programs or duplicating efforts.
6. The ability to share financial and personnel resources to address large and expensive projects.

Note: Among the fiscal and operational challenges facing a new, unified district are:

1. Merging teacher and support staff contracts
2. Declining enrollment in both districts
3. Increased spending pressures in both districts
4. The existence at Williamstown Elementary School of two modular classroom structures, that while in excellent condition, will eventually need to be replaced depending on long term enrollment trends.
5. Reconciling existing differences in per pupil spending and tax rates in a manner that both communities value and perceive as being in the best interest of everyone's children.

Part C: Maximizing Efficiencies

During the course of its study, the Committee identified the following opportunities for achieving and sustaining financial and operational efficiencies through unification.

- I. Unification of Central Office Services**
- II. Coordinating the delivery of High School Programming**
- III. State Tax Incentives over 4 years; Merger Implementation Grants**
- IV. Large Scale Purchasing/Contract Negotiation with Private Vendors**
 - a. Technology
 - b. Books & supplies
 - c. Maintenance needs
 - d. Food Services
 - e. Transportation
- V. Shared Administrative, Staffing, and Service Delivery Models**
 - a. Coordinate teaching/staffing assignments (responding to changing school demographics, program, and building needs)
 - b. Eliminate administrative redundancy
 - c. Streamline existing service models (transportation, maintenance)
 - d. Coordinate financial administration/reduce bureaucracy
 - i. Reduced number of audits
 - ii. Fewer board expenses - board services/support (stenographer, legal, dues, etc.)
 - iii. Purchasing process
 - e. Increase efficiency in state and federal data collection and reporting
 - f. Coordinate use of facilities
- VI. Further Collaboration of Special Education and Behavioral Management Services**
 - a. Review of out-of-house vs in-house delivery models and opportunities
 - b. Alternative program delivery
- VII. Asset Coordination**
 - a. Buildings and grounds
 - b. Deferred maintenance
 - c. Long-term capital planning

Summary Analysis of Potential Operational Efficiencies, Cost Savings, and Revenues due to State Incentives:

Note: All financial projections are based on FY17 budget numbers; the basis for each projection/cost saving is outlined throughout the report.

1. Unification of Central Office Services: \$232,500/year ongoing

The creation of a Side-by-Side Supervisory Union between Orange North and Washington South with the merging of two central offices into one, is estimated to save about \$334,000 union-wide. The projected savings for Washington and Orange in year one (ongoing) is approximately \$77,500 (25% of ADM) and the savings for Northfield and Williamstown in year one (ongoing) is approximately **\$232,500** (75% of ADM). The total over the first 5 years of operation of the new unified district: ~\$1,162,500

Potential Savings - Central Office Unification:	
Northfield/Williamstown:	\$232,500
Orange/Washington:	\$77,500

(See Appendix 1)

2. Better Coordination of High School Programming: (See Appendix 5)

A sectioning analysis of high school courses offered by both districts revealed not only the capacity to combine sections in certain courses to optimize class sizes, but duplication of certain course offerings that if offered across both high schools would also result in an optimization of student/teacher ratios. In addition, programs offered in one high school but not in the other could, through scheduling **and** program coordination result in increased educational opportunities for all students.

If a creative approach to coordinating existing programs at the high school level were able to eliminate 100% of the current programmatic duplication and fully optimize existing teaching resources, the resultant ongoing savings would be approximately **\$300,000** per year, which could be used for program development and/or tax relief.

Total "Savings" in Sections/Courses	17.5 sections
Total "Savings" in Teacher FTE" (Full Time Equivalent)	3.5 FTE
Total Dollars for Program Enhancement~	\$300,000

(See Appendix 6)

3. Additional Savings due to Maximizing Operational Efficiencies:

Identifying specific savings due to large scale purchasing, contract negotiation, and better asset coordination is difficult to predict. The financial model outlined in the next section approximates these savings and projects the impact on future tax rates of realizing a modest reduction in the annual growth of budget and educational spending over the next 6 years of .5% due to maximizing the operational efficiencies outlined in this section of report for a new unified district – that potential savings is estimated to be approximately ~\$142,000 in year one and approximately ~\$710,000 over the first 5 years of operation of the new unified district which could be used for program development and/or tax relief.

Impact of cutting annual growth in spending by .5% per year over 5 years = \$710,000

4. Impact of Tax Incentives

Note: The value of future incentives are projections based on current state policies and represents the Committee's best estimate of the revenue impact of current state incentives.

The projected impact of tax incentives on the overall tax rates of both Northfield and Williamstown represents a total savings of approximately ~\$1,206,180.

SUMMARY: PROJECTED COST SAVINGS/PROTECTED REVENUES DUE TO MERGER WITH INCENTIVES OVER 5 YEARS (THE LIFE OF THE FINANCIAL MODEL)

- Projected value of Tax incentives: \$1,206,180
- Projected values of saving .5% savings on the annual growth rate: \$710,000
- Projected saving of unifying Central Office: \$1,162,500 (for Northfield and Williamstown)
- Projected savings from better coordination of existing high school programs and create optimal class sizes: \$1,500,000 (if optimized class sizes were established in year one of the merger)

**Total Potential Cost Savings/Revenue Incentives Due to Merger with Incentives over 5 years:
~\$4,578,680**

The Committee believes that the operational cost savings and the projected tax savings due to incentives could be used to invest in the transition, improve school infrastructure, or reduce tax rates at the discretion of the new board.

For example, the impact on tax rates of applying a \$300,000 reduction in education spending in year one of the merger would result in a five-year net reduction in taxes of ~\$796,662 for the

new district. This could be accomplished by applying the \$250,500 savings from unifying the districts' two central offices and directing an additional \$45,500 in operational savings towards tax relief. Or the new district could recommend redirecting these savings towards instructional enhancement across the district to improve student performance and provide greater educational opportunity for every child in the new unified union.

FINAL REVENUE ENHANCEMENTS DUE TO INCENTIVIZED MERGER:

1. Merger Implementation Grant: \$150,000

To assist merging districts establishing a new supervisory union, the state has established a grant of \$150,000 to be used in support of setting up both new unified districts (Orange/Washington and Northfield/Williamstown) within the new proposed supervisory union. To date \$40,000 of this grant has been used to complete the merger studies for each of side of the proposed side-by-side. The utilization of the remaining funds (\$110,000) would be decided by the new supervisory union board.

Part D: Financial Model

Model Projections:

This financial model projects trends in future homestead tax rates through FY23 for the districts of Northfield and Williamstown participating in this study. The model projects:

- The trend lines in Educational Spending and Local Tax rates for a merged district beginning in FY19, and
- The trend lines in Educational Spending and Local Tax rates for those same districts should they remain as they are (No Change Scenario), and,
- The differences in tax rates between a merged scenario and a No Change Scenario and computes the total increases/decreases in tax liabilities through FY23.

Note: The model was created for purposes of comparative illustrations, and under no circumstances should be relied upon to forecast future actual tax rates and tax savings resulting if and when a merger occurs or does not occur.

The model does not account for, nor is it intended to account for, future policy decisions, management decisions and/or changes in any factor reflected in the model, now or over time.

Assumptions:

- The model assumes that the new unified district would come into existence in FY19.
- The Model uses existing financial data from FY17 and FY18 from each individual district involved in this study for determining the baseline for educational spending, equalized pupils, equalized spending per equalized pupil, etc. for the new merged district.
- It considers the previous five-year average for the determining the change rates for education spending and equalized pupils, though individual districts can adjust these rates at their own discretion should they believe past trends to be an inaccurate predictor of future trends.
- The model builds in the tax incentives associated with a Phase II merger over the first four years of the new district's existence. It also takes into account the 5% rate limit on increases or decreases on the homestead property tax rate during that same time frame.

- The merged model leaves in place the hold-harmless provision on equalized pupil calculations (e.g. equalized pupil counts do not drop more than 3.5% per year) for every eligible district in the new merged district as well as the continuation of small schools grants to eligible districts
- For, the No Change Scenario, hold-harmless and small school grants are phased out in accordance with the terms of Act 46. (Hold-Harmless FY21 and Small Schools Grants FY20)
- The model’s default setting projects the taxes on a \$150,000 house. That setting can be changed to project the potential tax impact on properties assessed at different values.

Rates of Change:

- The model allows the user to manipulate the rates of change in:
 - ✓ Educational Spending for each town and for the new district as a whole.
 - ✓ Equalized Pupils for each town and for the new district as a whole.
 - ✓ Educational Grand List for each town. (In the current iteration of this model, we left the GL unchanged (0%).
 - ✓ The Model also builds in a place holder for savings in educational spending for the new district in year one.

To determine a **starting place** for assessing projected rates of change in Educational Spending and Equalized Pupils, this model uses the previous five-year average change rate in Educational Spending and Equalized Pupil Counts based on the specific data from FY12 and FY17.

	2017	
	EdSpending	EqPup
Northfield	\$8,567,812	584.40
Williamstown	\$7,231,544	520.66
	\$15,799,356	1105.06

	2012	
	EdSpending	EqPup
Northfield	\$7,694,357	620.37
Williamstown	\$6,549,525	533.97
	\$14,243,882	1154.34

Past Five Year Trends (%increases/decreases)

	EdSpending	EqPup
Northfield	2.17%	-1.19%
Williamstown	2.00%	-0.50%
TOTAL	2.09%	-0.87%

These change rates can be adjusted at any time by the committee. For this initial run of the model the change rates were:

Changes:

	EdSpInc	EqPupInc	GL Inc
Northfield	2.17%	-1.00%	0%
Williamstown	2.00%	-0.50%	0%
Unified District	1.59%		

In addition, the financial model projects for a new unified district the potential tax impact of a modest *reduction in the annual growth of budget and educational spending* over the next 5 years of .5% due to maximizing the operational efficiencies outlined in the previous section of this report.

Finally, the Committee undertook two runs of this model:

Run #1 of this model assumes that **none** of the projected operational savings are applied in the first year of the new district’s operation. It projects only the impact of merger incentives and a reduction in the growth of educational spending in the merged district of one half of one percent per year projected over 5 years.

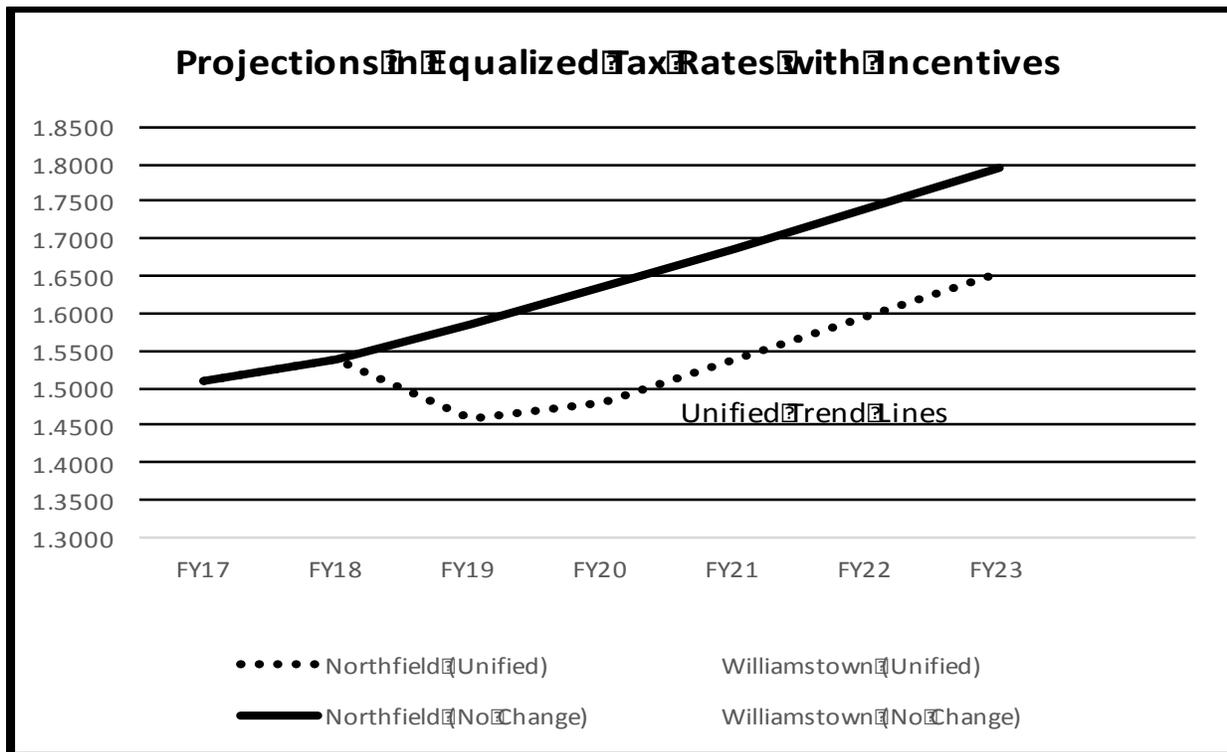
Run #2 of this model assumes that \$300,000 of operational savings are utilized for tax relief in the first year of the new district’s operation. It projects the combined impact of applying some of operational saving to tax relief, and the combined impact of merger incentives and a reduction in the growth of educational spending in the merged district of one half of one percent per year projected over 5 years.

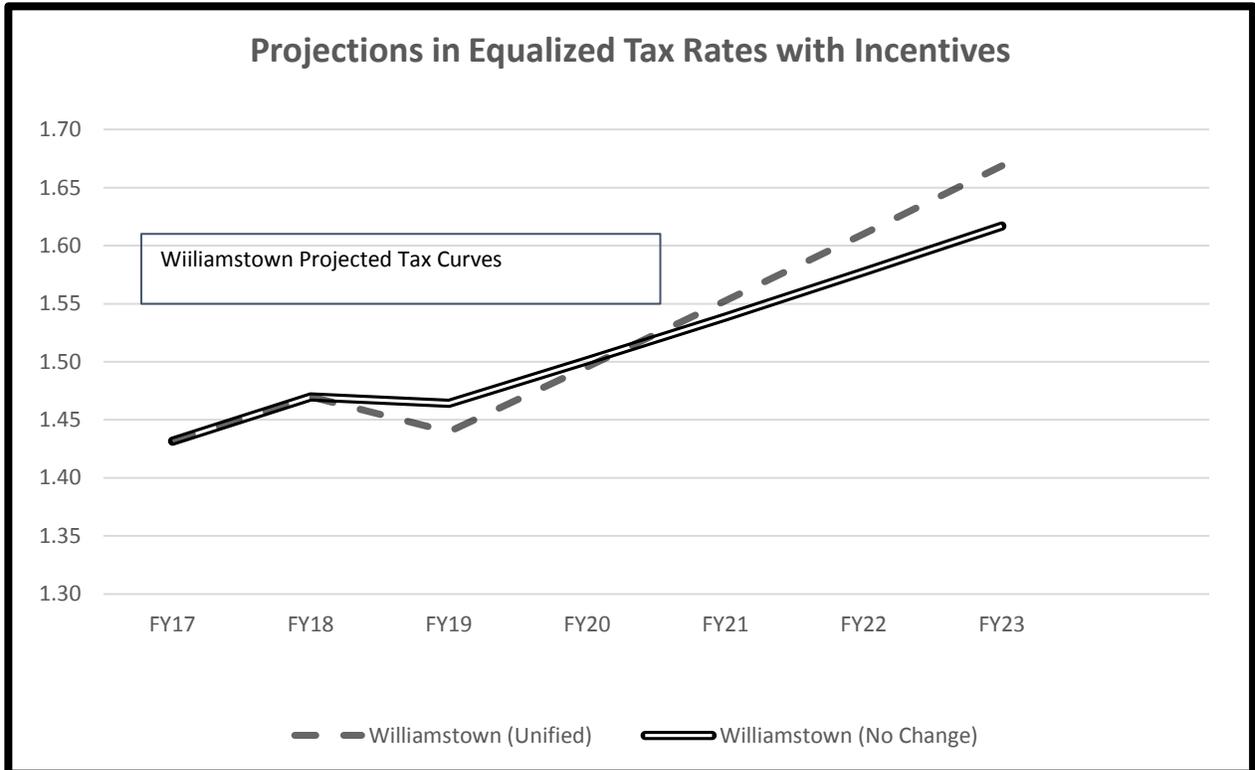
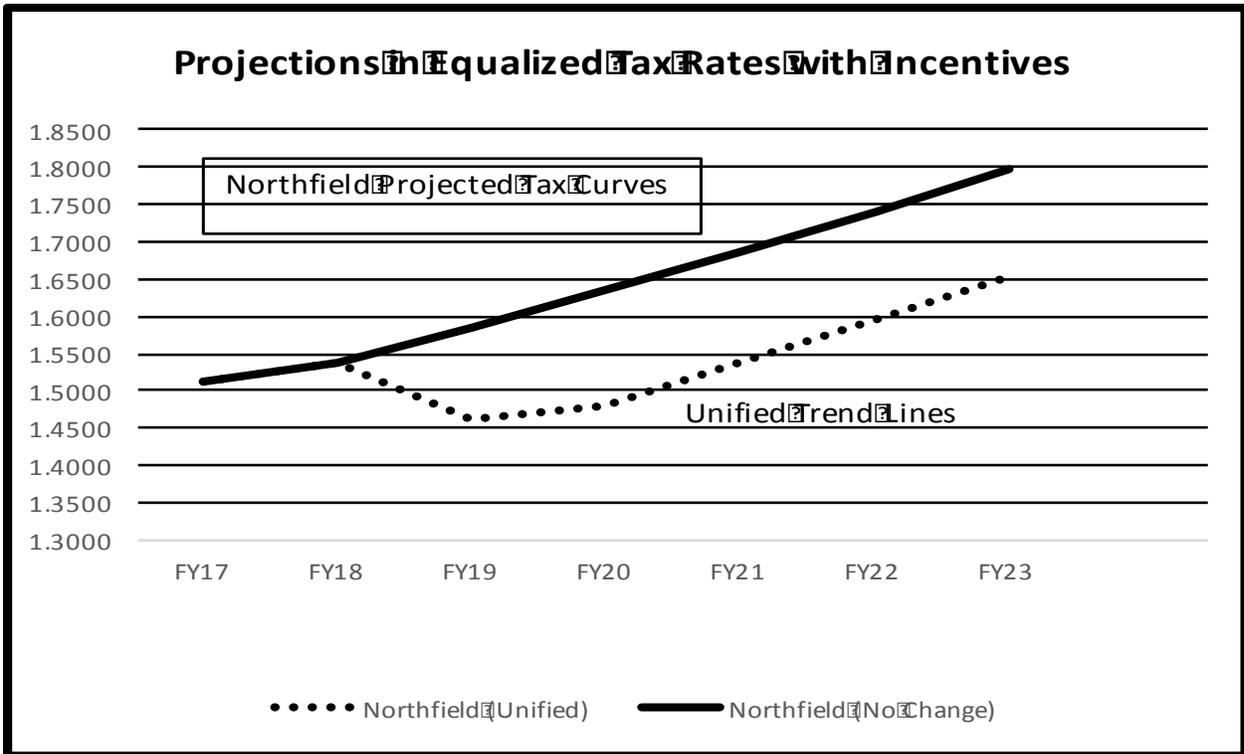
Results:

Run #1: Incentives and reduction in growth of educational spending of .05%

Equalized Homestead Tax Rates								
		FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified, effective FY19								
	Northfield (Unified)	1.5113	1.5369	1.4601	1.4956	1.5525	1.6102	1.6688
	Williamstown (Unified)	1.4317	1.4697	1.4396	1.4956	1.5525	1.6102	1.6688
No Change								
	Northfield (No Change)	1.5113	1.5369	1.5837	1.6344	1.6868	1.7408	1.7965
	Williamstown (No Change)	1.4317	1.4697	1.4641	1.5009	1.5386	1.5773	1.6169

FY23 Equalized Homestead Tax Rates		
	Unified	No Change
Northfield	\$1.6688	\$1.7965
Williamstown	\$1.6688	\$1.6169





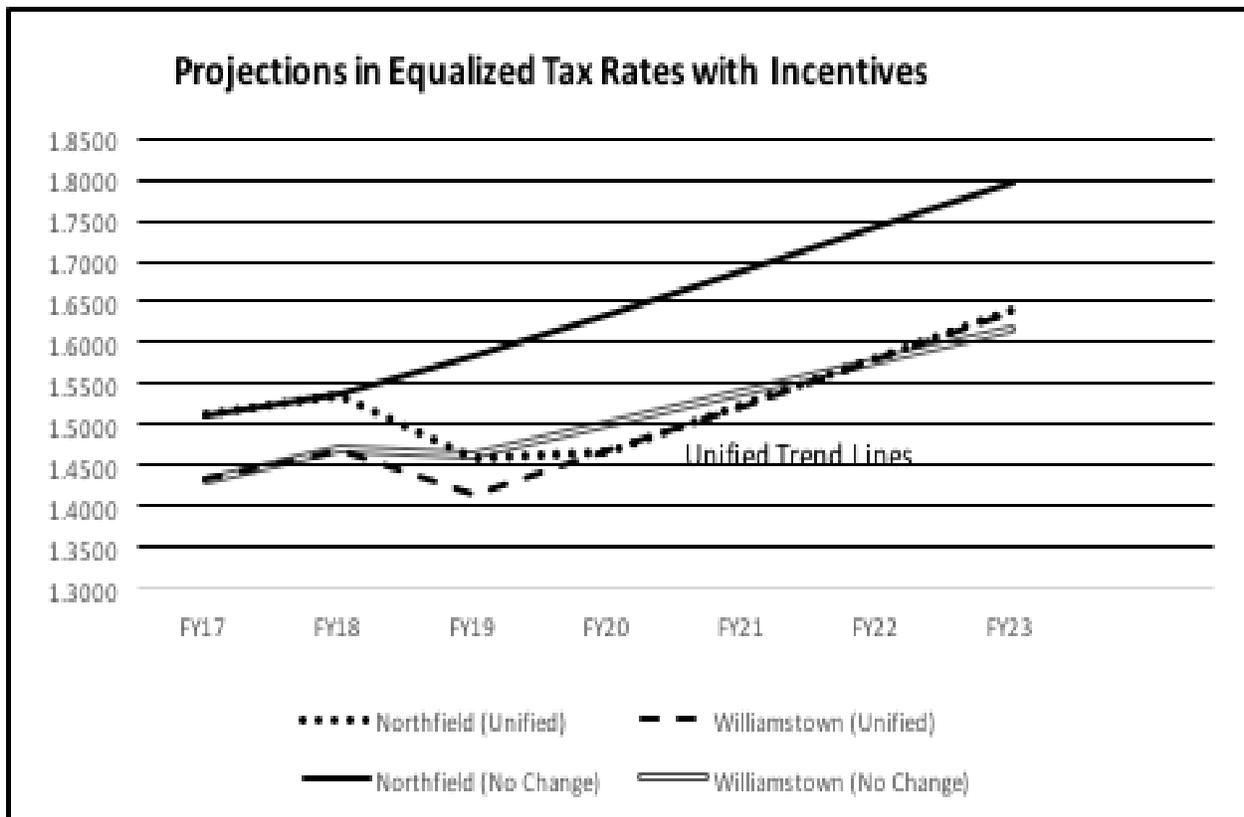
Unified Union		FY17	FY18	FY19	FY20	FY21	FY22	FY23	Total
Northfield									
	Homestead Tax Rate	\$1.5113	\$1.5369	\$1.4601	\$1.4956	\$1.5525	\$1.6102	\$1.6688	
	Tax \$ (homestead)	\$4,860,683.87	\$4,962,020	\$4,714,064	\$4,828,679	\$5,012,386	\$5,198,676	\$5,387,871	
	Tax savings due to unification	\$0.00	\$0	\$399,054	\$448,128	\$433,600	\$421,654	\$412,291	\$2,114,726
	Tax \$ on \$150K home	\$2,266.95	\$2,305	\$2,190	\$2,243	\$2,329	\$2,415	\$2,503	
	Tax savings on \$150K home	\$0.00	\$0	\$185	\$208	\$201	\$196	\$192	\$983
Williamstown									
	Homestead Tax Rate	\$1.4317	\$1.4697	\$1.4396	\$1.4956	\$1.5525	\$1.6102	\$1.6688	
	Tax \$ (homestead)	\$4,102,175.56	\$4,235,570	\$4,148,824	\$4,310,212	\$4,474,193	\$4,640,480	\$4,809,361	
	Tax savings due to unification	\$0.00	\$0	\$70,607	\$15,274	(\$40,059)	(\$94,815)	(\$149,572)	(\$198,565)
	Tax \$ on \$150K home	\$2,147.55	\$2,205	\$2,159	\$2,243	\$2,329	\$2,415	\$2,503	
	Tax savings on \$150K home	\$0.00	\$0	\$37	\$8	(\$21)	(\$49)	(\$78)	(\$103)
Unified Merger Totals									
	Tax \$ Raised in Town	\$8,962,859.43	\$9,197,590	\$8,862,888	\$9,138,891	\$9,486,579	\$9,839,156	\$10,197,232	\$65,685,195
	Tax savings due to unification	\$0.00	\$0	\$469,661	\$463,403	\$393,541	\$326,838	\$262,719	\$1,916,162

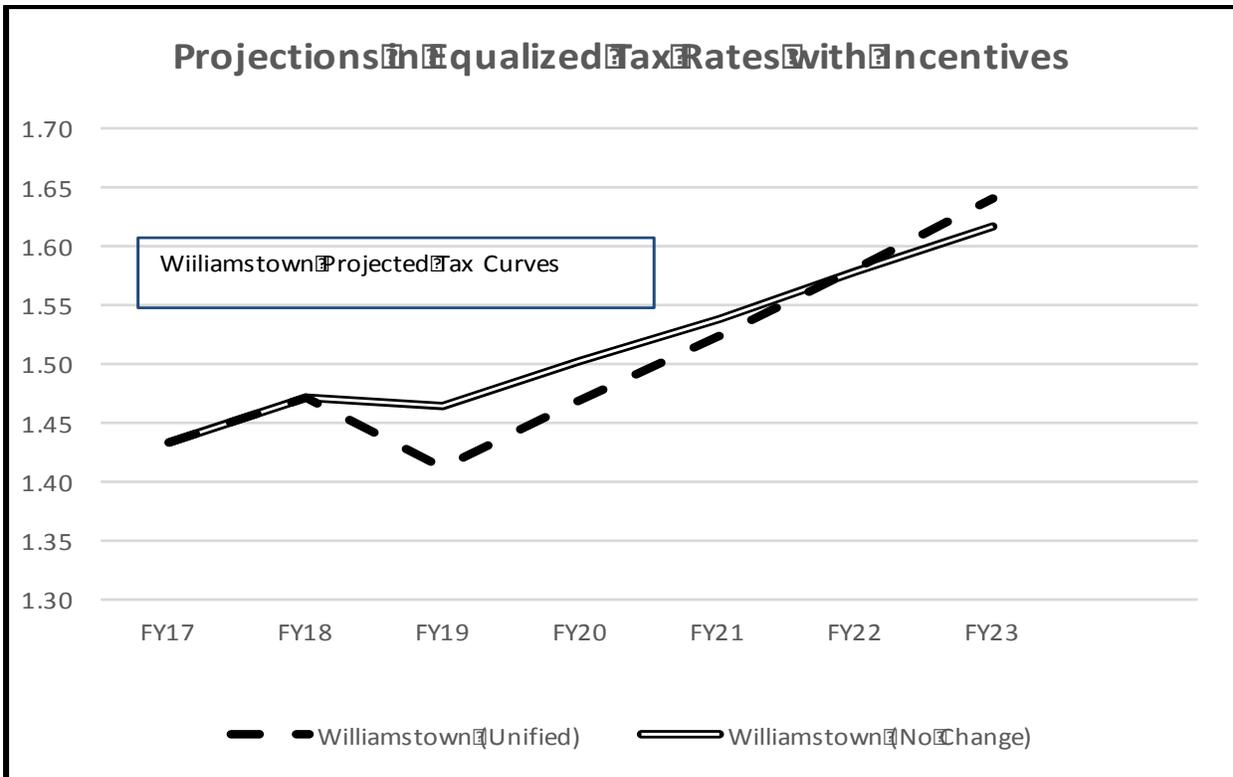
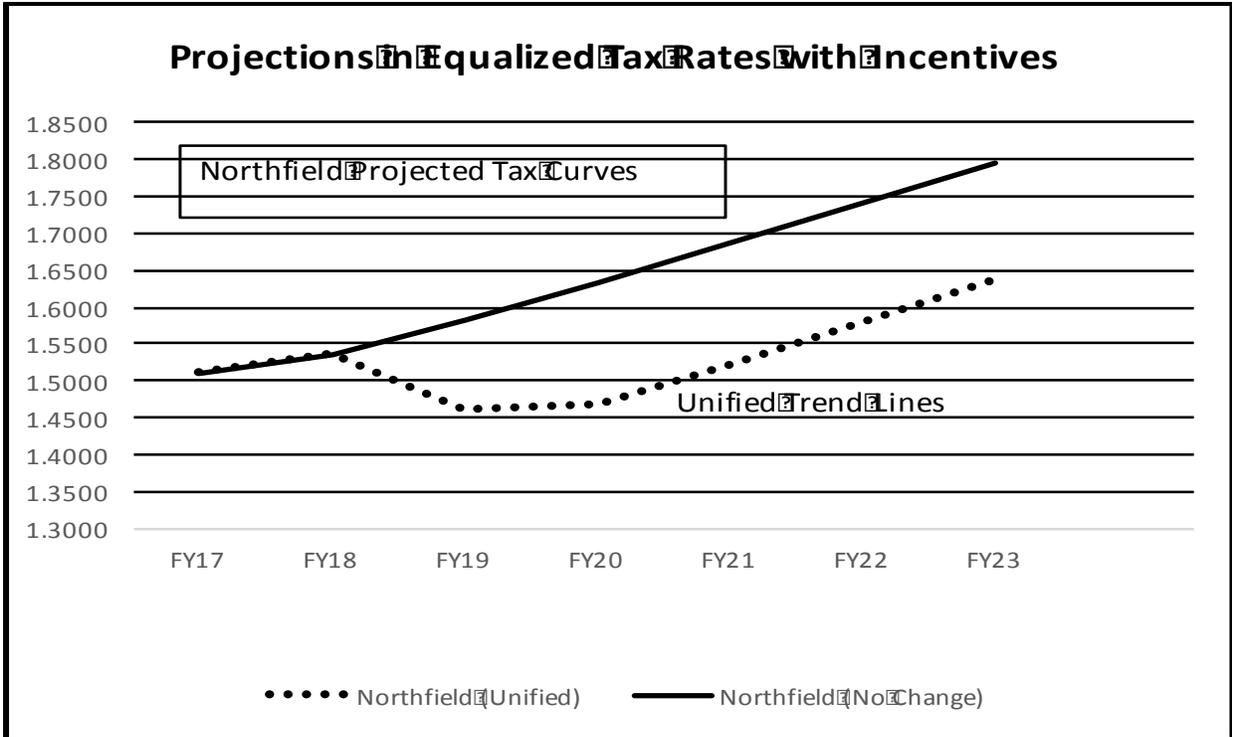
No Change	FY17	FY18	FY19	FY20	FY21	FY22	FY23	Total
Northfield								
Homestead Tax Rate	\$1.5113	\$1.5369	\$1.5837	\$1.6344	\$1.6868	\$1.7408	\$1.7965	
Tax \$ (homestead)	\$4,860,683.87	\$4,962,020	\$5,113,118	\$5,276,807	\$5,445,986	\$5,620,329	\$5,800,162	
Tax savings due to unification								
Tax \$ on \$150K home	\$2,266.95	\$2,305	\$2,376	\$2,452	\$2,530	\$2,611	\$2,695	
Tax savings on \$150K home								
Williamstown								
Homestead Tax Rate	\$1.4317	\$1.4697	\$1.4641	\$1.5009	\$1.5386	\$1.5773	\$1.6169	
Tax \$ (homestead)	\$4,102,175.56	\$4,235,570	\$4,219,431	\$4,325,486	\$4,434,134	\$4,545,665	\$4,659,789	
Tax savings due to unification								
Tax \$ on \$150K home	\$2,147.55	\$2,205	\$2,196	\$2,251	\$2,308	\$2,366	\$2,425	
Tax savings on \$150K home								

Run #2: Incentives and reduction in growth of educational spending of .05% and \$300,000 operational savings applied in year 1

EQUALIZED HOMESTEAD TAX RATES								
		FY17	FY18	FY19	FY20	FY21	FY22	FY23
UNIFIED, EFFECTIVE FY19								
	NORTHFIELD (UNIFIED)	1.5113	1.5369	1.4601	1.4676	1.5238	1.5808	1.6388
	WILLIAMSTOWN (UNIFIED)	1.4317	1.4697	1.4122	1.4676	1.5238	1.5808	1.6388
NO CHANGE								
	NORTHFIELD (NO CHANGE)	1.5113	1.5369	1.5837	1.6344	1.6868	1.7408	1.7965
	WILLIAMSTOWN (NO CHANGE)	1.4317	1.4697	1.4641	1.5009	1.5386	1.5773	1.6169

FY23 EQUALIZED HOMESTEAD TAX RATES		
	UNIFIED	NO CHANGE
NORTHFIELD	\$1.6388	\$1.7965
WILLIAMSTOWN	\$1.6388	\$1.6169





UNIFIED UNION		FY17	FY18	FY19	FY20	FY21	FY22	FY23	TOTAL
NORTHFIELD									
	HOMESTEAD TAX RATE	\$1.5113	\$1.5369	\$1.4601	\$1.4676	\$1.5238	\$1.5808	\$1.6388	
	TAX \$ (HOMESTEAD)	\$4,860,683.87	\$4,962,020	\$4,714,064	\$4,738,279	\$4,919,725	\$5,103,755	\$5,291,013	
	TAX SAVINGS DUE TO UNIFICATION	\$0.00	\$0	\$399,054	\$538,529	\$526,260	\$516,574	\$509,149	\$2,489,566
	TAX \$ ON \$150K HOME	\$2,266.95	\$2,305	\$2,190	\$2,201	\$2,286	\$2,371	\$2,458	
	TAX SAVINGS ON \$150K HOME	\$0.00	\$0	\$185	\$250	\$245	\$240	\$237	\$1,157
WILLIAMSTOWN									
	HOMESTEAD TAX RATE	\$1.4317	\$1.4697	\$1.4122	\$1.4676	\$1.5238	\$1.5808	\$1.6388	
	TAX \$ (HOMESTEAD)	\$4,102,175.56	\$4,235,570	\$4,069,859	\$4,229,518	\$4,391,482	\$4,555,752	\$4,722,904	
	TAX SAVINGS DUE TO UNIFICATION	\$0.00	\$0	\$149,572	\$95,968	\$42,653	(\$10,087)	(\$63,114)	\$214,992
	TAX \$ ON \$150K HOME	\$2,147.55	\$2,205	\$2,118	\$2,201	\$2,286	\$2,371	\$2,458	
	TAX SAVINGS ON \$150K HOME	\$0.00	\$0	\$78	\$50	\$22	(\$5)	(\$33)	\$112
UNIFIED MERGER TOTALS									
	TAX \$ RAISED IN TOWN	\$8,962,859.43	\$9,197,590	\$8,783,923	\$8,967,796	\$9,311,207	\$9,659,507	\$10,013,917	\$64,896,799
	TAX SAVINGS DUE TO UNIFICATION	\$0.00	\$0	\$548,626	\$634,497	\$568,913	\$506,488	\$446,034	\$2,704,558

NO CHANGE		FY17	FY18	FY19	FY20	FY21	FY22	FY23	TOTAL
NORTHFIELD									
	HOMESTEAD TAX RATE	\$1.5113	\$1.5369	\$1.5837	\$1.6344	\$1.6868	\$1.7408	\$1.7965	
	TAX \$ (HOMESTEAD)	\$4,860,683.87	\$4,962,020	\$5,113,118	\$5,276,807	\$5,445,986	\$5,620,329	\$5,800,162	
	TAX SAVINGS DUE TO UNIFICATION								
	TAX \$ ON \$150K HOME	\$2,266.95	\$2,305	\$2,376	\$2,452	\$2,530	\$2,611	\$2,695	
	TAX SAVINGS ON \$150K HOME								
WILLIAMSTOWN									
	HOMESTEAD TAX RATE	\$1.4317	\$1.4697	\$1.4641	\$1.5009	\$1.5386	\$1.5773	\$1.6169	
	TAX \$ (HOMESTEAD)	\$4,102,175.56	\$4,235,570	\$4,219,431	\$4,325,486	\$4,434,134	\$4,545,665	\$4,659,789	
	TAX SAVINGS DUE TO UNIFICATION								
	TAX \$ ON \$150K HOME	\$2,147.55	\$2,205	\$2,196	\$2,251	\$2,308	\$2,366	\$2,425	
	TAX SAVINGS ON \$150K HOME								

Summary Financial Observations:

In reviewing the data from the financial model, the Committee noted that:

1. The numbers (equalized pupil counts, educational spending, yield figures, etc.) used in the model are not set in stone and a lot can happen with them. **The model was designed to predict trend lines not future tax rates.**
2. Becoming a unified district would result in tax incentives (8,6,4,2 cents over four years off the homestead tax rate).
3. All education spending and all equalized pupils of both the Northfield and Williamstown School Districts are combined to arrive at a unified homestead tax rate.
4. The difference between the two trend lines (“no change” vs. merger) in **Run #1** represents the tax savings in the homestead tax rate due to the incentives, and a decrease in the growth of overall spending in the new unified district by .005%. In **Run #2**, the difference in the two trend lines is a result of tax savings in the homestead tax rate due to the incentives, a decrease in the growth of overall spending in the new unified district by .005%, and a one-time reduction in spending of \$300,000 for the entire district in year one of its operation
5. The property yield is the amount a district would be spending per pupil if its homestead tax rate was \$1.00. This year, the yield is \$10,076. The model is not designed to account for future variations in the yield so it is constant at \$10,076 throughout the modeling years. Using a constant value potentially creates a conservative estimate in future tax savings.
6. Local tax rates will be different depending on the Common Level of Appraisal (CLA) in each community. The model is set for no change in the CLA over the next five years.
7. The current grand list information was used for each town. If the list changes the numbers will change. The model uses the same grand list totals throughout.
8. The growth in education spending rate used in the model for the new district is 1.59%. FY2019 is the assumed date that the new district comes into existence. In **Run #1**, the estimated educational spending per equalized pupil in year one is \$15,310.97. For FY18, the educational spending per equalized pupil in Northfield is \$15,485.94; in Williamstown \$14,808.94. In **Run #2**, the estimated educational spending per equalized pupil in year one is \$15,035.28. For FY18, the educational spending per equalized pupil in Northfield is \$15,485.94; in Williamstown \$14,808.94.
9. The law says that the homestead tax rate can only go up or down 5% from the current homestead rate. In the model, Northfield does not get the full benefit of the 8 cent drop in the homestead tax rate because the difference in the towns current tax rate, and the lower

unified tax rate in year one is larger than 5%. Thereafter, both districts get the full benefit of the remaining tax incentives

10. By FY2023, all the incentives are gone, and the homestead tax rate in the new unified district is the same for all communities.
11. In **Run #1**, the *projected* total tax savings for a unified district, due to the incentives and a .005% reduction in the growth of educational spending in the new unified district is approximately \$1,916,162. In **Run #2**, the *projected* total tax savings for the unified district, due to the incentives, a .005% reduction in the growth of educational spending, and a one-time reduction in educational spending in year one of the new unified district is approximately \$2,704,558.
12. The projected value of tax savings and operational savings during the first five years of operation of the new district saving totaled \$4,578,680. (Without using any of these savings for tax relief)
 - Projected value of Tax incentives: \$1,206,180
 - Projected values of saving .5% savings on the annual growth rate: \$710,000
 - Projected saving of unifying Central Office: \$1,162,500 (for Northfield and Williamstown)
 - Projected savings from better coordination of existing high school programs and create optimal class sizes: \$1,500,000 (if optimized class sizes were established in year one of the merger)
13. Northfield is currently financing \$268,000 in long term debt; Williamstown is currently paying down a long-term bond with a remaining balance of \$2.7 million that financed renovations at the Middle School/High School in [date?]. Both debts are already factored into the current equalized cost for equalized pupil in both districts. Despite the higher debt liability, Williamstown brings to the merger a lower equalized cost per equalized pupil – the key financial determinate of local tax rates.

Part E: Transition Planning

Upon an affirmative vote of the electorate in the Towns of Northfield and Williamstown on May 2, 2017 and certification of the final vote of each district by the Vermont Secretary of Education to the Vermont Secretary of State per 16 VSA § 706g, the new Central Vermont Unified Union School District would come into existence and have all of the authority necessary for it to prepare for full educational operations beginning on July 1, 2018.

The Central Vermont Unified Union School District would, between the date of its first organizational meeting under 16 VSA – 706j and June 30, 2018, undertake all the planning and related duties necessary to begin operations of the new unified union school district on July 1, 2018, including:

- a. Preparing for and negotiating contractual agreements;
- b. Preparing and presenting a budget to the voters for fiscal year 2019;
- c. Preparing for the Central Vermont Unified Union School District annual meeting;
- d. Transacting any other lawful business that comes before the Board.

The authority exercised by new Central Vermont Unified Union School District shall not limit or alter the ongoing authority and/or responsibilities of the school boards that make up the current districts of Northfield and Williamstown which will remain in existence during the transition period for the purpose of completing any and all business not given under law to the new unified union district board. In essence, each individual district board would maintain its current authority until the new district becomes operational on July 1, 2018. The existing districts and supervisory union will remain in operation after July 1, 2018 only to conclude any business.

In summary, an affirmative vote of the electorate in both Northfield and Williamstown would also result in, but not be limited to, the following:

- a. Employees throughout the current individual school districts (Northfield and Williamstown) offered continuing employment following the 2017-2018 school year, consistent with all legal requirements, would become employees of the new Central Vermont Unified Union School District.
- b. All assets of the pre-existing districts would be transferred to the new unified union district for the sum of \$1.00 as of July 1, 2018.
- c. Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the new unified union district as of July 1, 2018.
- d. Following the certification of the election results by the Agency of Education to the Secretary of State (30-45 days after the vote), an organizational meeting of the new unified district would be convened by the Secretary of the Agency of Education or designee in accordance with Title 16, 706j.

- e. The newly elected members of the Central Vermont Unified Union School District, consistent with statute, would begin the work of preparing for the district's first day of operations - hiring a superintendent in conjunction with the other unified districts making up the new Supervisory Union, defining administrative and operational roles and responsibilities, establishing policy, negotiating contracts, developing budgets, and establishing new structures for community engagement.

- f. Through June 30, 2018, the two pre-existing boards of the supervisory union would continue to govern their respective districts and/or schools. The existing districts and supervisory union will remain in operation after July 1, 2018 only to conclude any business.

Part F: Articles of Agreement

Central Vermont Unified Union School District

The joint Northfield Williamstown Act 46 Study Committee recommends the following Articles of Agreement by each necessary district school district for the creation of a Pre-Kindergarten through grade 12 unified union school district provisionally to be named the Central Vermont Unified Union School District. **(See Article 17.)**

Article 1. Necessary and Advisable Forming School Districts

The School Districts of Northfield and Williamstown are necessary for the establishment of the Central Vermont Unified Union School District. The above referenced school districts are hereinafter referred to as the “forming districts”.

There are no districts named “advisable” to this proposal.

Article 2. Effect of Vote/Creation of New District

The Unified District shall be formed and the terms hereby voted shall become effective on the date this article is approved by a majority vote of the electorate of each Member District voting in a meeting for adoption of this article and said votes become final per 16 V.S.A. 706g.

If the Unified District is formed and if, the voters of the Orange School District and the Washington School district vote to approve the formation of the Orange Washington Unified Union School District and said vote becomes final and that district becomes operational on July 1, 2018 then both new unified union school districts would be members of a new supervisory union and would meet the criteria of “Side-by-Side” mergers pursuant to 2012 Acts and Resolves No. 156.

Article 3. Grades to Operate

The Central Vermont Unified Union School District will operate grades Pre-Kindergarten through grade 12.

Article 4. Proposed New School Construction

No new schools or renovations are proposed at this time.

Article 5. Plan for First Year of Operation

The Central Vermont Unified Union School District will provide for the transportation of students, assignment of staff, and curriculum that is consistent with the *practices/contracts*, collective bargaining agreements, and provisions of law that are in effect during the first year that the new Union District is providing full educational services and operations.

The board will comply with the 16 VSA Chapter 53, subchapter 3, regarding recognition of the representatives of employees of the respective forming districts as the representatives of the employees of the union school district and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees. In the absence of new collective bargaining agreements on the July 1, 2018, the Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, subchapter 3. The Board shall honor all individual employment contracts that are in place in the forming districts on June 30, 2018 until their respective termination dates.

Article 6. Indebtedness of Member Districts

A. Capital Debt

The Central Vermont Unified Union School District shall assume all capital debt as may exist on June 30, 2018, including both principal and interest, of the forming school districts that joined the new union district.

B. Operating Fund Surpluses, Deficits and Reserve Funds

The Central Vermont Unified Union School District shall assume any and all operating deficits, surpluses, and fund balances of the forming districts that may exist on the close of business on June 30, 2018. In addition, reserve funds identified for specific local purposes will be transferred to the Central Vermont Unified Union District, and will be utilized for their original established purposes unless otherwise determined through appropriate legal procedures.

C. Restricted Funds:

The forming school districts will transfer to the Central Vermont Unified Union School District any preexisting specific endowments, scholarships, or other restricted accounts, including student activity and related accounts, held by school districts that may exist on June 30, 2018. Scholarship accounts or similar accounts, held by the forming districts prior to June 30, 2018, that have specified conditions of use will be used in accordance with said provisions.

Article 7. Real and Personal Property

A. Transfer of Property to the Unified District:

No later than June 30, 2018, the forming districts will convey to the Central Vermont Unified Union School District, for the sum of one dollar, and subject to the encumbrances of record, all of their school-related real and personal property, including all land, buildings, and content.

B. Subsequent Sale of Real Property to Towns:

In the event that, and at such subsequent time as, the Central Vermont Unified Union Board of Directors determines, in its discretion, that continued possession of the real property, including land and buildings, conveyed to it by one or more of the town elementary forming districts will not be used in direct delivery of student educational programs, the Central Vermont Unified Union School District shall offer for sale such real property to the town in which such real property is located, for the sum of one dollar, subject to all encumbrances of record, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants required by Vermont law, in addition to costs of capital improvements subsequent to July 1, 2018.

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

Article 8. Board of School Directors Representation

The Central Vermont Unified Union District Board of Directors shall be composed of nine (9) individuals elected by Australian ballot by the voters of the municipalities in which they reside. Each municipality within the Unified District shall be guaranteed at least two resident representatives.

Based on the 2010 census, the new unified union board will consist of five (5) representatives residing in and representing Northfield; and four (4) residing in and representing Williamstown.

The Northfield and Williamstown ratio of directors are consistent with current census figures. specific numbers of directors allocated to each municipality shall be aligned to the new counts if necessary.

Article 9: Initial Directors Terms of Office

School Directors will be elected by Australian ballot for three year terms, except for those initially elected at the time of the formation of the new Central Vermont Unified Union School District. In the initial election of School Directors, the terms of office will be as follows:

Town	Term ending March 2019	Term ending March 2020	Term ending March 2021
Northfield	2	1	2
Williamstown	1	2	1

The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting in 2018.

Nominations for the office of Central Vermont Unified Union School Director representing a specific town shall be made by filing, with the clerk of that district/town proposed as a member of the Unified District, a statement of nomination signed by at least 30 voters in that district/town or one percent of the legal voters in the district/town, whichever is less, and accepted in writing by the nominee. A statement shall be filed not fewer than 30, nor more than 40 days prior to the date of the vote.

Pursuant to the provisions of 16 V.S.A. – 706j(b), directors initially elected to the new district shall be sworn in and assume the duties of their office.

Thereafter, members of the Board of School Directors will be elected by Australian ballot at the unified school district’s Annual Meeting. Terms of office shall begin and expire on the date of the school district’s annual meeting. In the event the district’s annual meeting precedes Town Meeting Day, the Director’s terms shall expire on Town Meeting Day.

Article 10. Submission to Voters

The proposal forming the Central Vermont Unified Union School District will be duly warned and presented to the voters of each town school district on May 2, 2017. The vote shall take place in each of the school districts by Australian ballot.

Article 11. Commencement of Operations

Upon an affirmative vote of the electorates of the forming districts and upon compliance with 16 VSA – 706g, the Central Vermont Unified Union School District shall have and exercise all of the authority which is necessary in for it to prepare for full educational operations beginning on July 1, 2018. The Central Vermont Unified Union School District shall, between the date of its organizational meeting under 16 VSA – 706j and June 30, 2018, undertake planning and related duties necessary to begin operations of the new unified union school district on July 1, 2018, including preparing for and negotiating contractual agreements, preparing and presenting the budget for fiscal year 2019, preparing for the Central Vermont Unified Union School District annual meeting, and transacting any other lawful business that comes before the Board, provided however, that the exercise of such authority by the Central Vermont Unified Union School District shall not be construed to limit or alter the authority and/or responsibilities of the school districts that will form the new unified union school district and that will remain in existence during the transition period for the purpose of completing any business not given to the Central Unified Union School District.

On July 1, 2018, when the Central Vermont Unified Union School District becomes fully operational and begins to provide educational services to students, the school districts of the forming towns shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the Central Vermont Unified Union School District under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2018. Upon the completion of outstanding business or December 31, 2018, whichever date is earlier, the forming school districts shall cease to exist pursuant to 16 VSA §722. Both the Northfield and Williamstown School Districts shall cease all operations within a reasonable timeframe of the completion of all outstanding business, but in no event any later than January 31, 2019.

Article 12. Australian Ballot Voting

The Central Vermont Unified Union School District shall vote the annual school district budget and public questions by Australian ballot. All votes shall be comingled prior to the count.

Article 13. Restructuring a School

Any proposal to restructure the current grade configurations of one or more of the district's current schools will require an affirmative vote by a majority of the Board of Directors and a robust and transparent process of public hearings, discussion and input. Prior to holding a vote on restructuring, the Board shall hold at least two public hearings regarding the district's proposed educational plan and delivery model, in each of the forming towns. After conducting public hearings, the Board of Directors shall give notice of its intent to hold a vote on any restructuring plan at least thirty days prior to a meeting warned for that purpose, stating the reasons/rationale for its recommendations.

Article 14. Closing a School

The new Central Vermont Unified Union District Board shall not close any school conveyed to the new unified union district by a forming town within the first four (4) years of operation of the new unified union district unless approved by the voters in the town where the school is located.

Thereafter, an affirmative vote by 3/4 the Board of Directors shall be required to close a school. Prior to holding a vote on whether to close a school, the Board shall hold at least two public hearings regarding the proposed school closure. At least one of the public hearings shall be held in the community in which the school is located. If after conducting public hearings, the Board of Directors intends to vote on whether to close a school, it shall give public notice of its intent to hold a vote on whether to close a school, stating the reason for the closure, at least 30 days prior to the vote.

If the Board votes to close a school, a binding referendum to that effect shall be submitted to an annual or special meeting for approval by the voters of the Unified Union School District. The closing shall become effective only if approved by a majority of the electorate voting by Australian ballot. The votes shall be commingled and approval of the referendum shall require a majority of all those voting.

Article 15. Community Engagement

Community connections to local schools are celebrated and cherished. Each community feels that schools are the heart of the community and values and supports equitable and quality public education for their children. The new unified union board shall provide timely and sufficient opportunity for local input on policy and budget development. Structures to support and encourage public participation within the new unified union district will be established by the new unified union board of school directors on or before July 1, 2018. These structures may include local school councils that have an advisory responsibility in key areas, including but not limited to new unified union district's budget development and hiring of principals. Local school councils or school advisory committees

may be considered whose purpose is to serve as building-based councils or teams that operate in an advisory capacity.

Article 16. Redistricting/Intra-district School Choice

For the first year of the operation of the new Central Vermont Unified Union School District, students will attend school in their current town of residency; provided however with parental consent, the Board may adjust student enrollment based upon individual circumstances and the needs of the unified union district. After the first year, the new unified school board will have the authority to adjust school attendance boundary lines with a 3/4 vote of the Board.

Students and their families may voluntarily request assignment at another school, according to policies on intra-district choice established by the Board.

Article 17. Renaming the New District

It is understood that the current name for the new unified union district, the “Central Vermont Unified Union School District,” is provisional for the purposes of legal identification in these articles and may be changed by a majority vote of school directors of the new unified union school district.

Appendices
Appendix 1: Proposed Savings in Supervisory Union Staff
WSSU / ONSU Central Office Merger

Washington South Supervisory Union #43 - Current		
<u>Position:</u>	<u>FTE</u>	<u>Salary & Benefits FY17:</u>
Superintendent	1.00	\$134,708
Business Manager	0.50	\$-
Bookkeeper	1.00	\$64,496
Human Resources	0.50	\$22,964
Curriculum Coordinator	0.50	\$-
Special Education Director	1.00	\$109,932
Receptionist	0.50	\$12,636
Administrative assistant - Superintendent	1.00	\$65,607
Administrative assistant - Sped Director	0.50	\$12,636
Facility / Transportation Director	1.00	\$62,853
After School Program Director	1.00	\$61,193
Food Service Director	1.00	\$67,736
Technology Coordinator	1.00	\$68,119
Technology Support Specialist (1)	1.00	\$53,474
Technology Support Specialist (1)	1.00	\$40,890
	FTE	Salary & Benefits FY17:
Total WSSU Staff - Central Office Only:	12.50	\$777,244

Orange North Supervisory Union #29 – Current		
<u>Position:</u>	<u>FTE</u>	<u>Salary & Benefits FY17:</u>
Superintendent	1.00	\$145,226
Business Manager	0.50	\$110,926
Bookkeeper	1.00	\$63,296
Human Resources	0.00	\$-
Curriculum Coordinator	0.50	\$114,667
Special Education Director	1.00	\$105,785
Receptionist	0.00	\$-
Administrative assistant - Superintendent	1.00	\$63,296
Administrative assistant - Sped Director	1.00	\$58,078
Facility / Transportation Director	0.00	\$-
After School Program Director	0.00	\$-
Food Service Director	0.00	\$-
Technology Coordinator	0.00	\$-
Technology Support Specialist (1)	1.00	\$54,504
Technology Support Specialist (1)	1.00	\$54,504
Total ONSU Staff - Central Office Only:	<u>FTE</u>	<u>Salary & Benefits FY17:</u>
	8.00	\$770,282
Combined Cost Two SU"s	20.50	

New Unified Supervisory Union – Proposed Staffing

<i>Superintendent</i>		<i>1.00</i>	<i>\$145,226</i>
<i>Business Manager</i>		<i>1.00</i>	<i>\$110,926</i>
<i>Bookkeeper</i>		<i>1.00</i>	<i>\$64,496</i>
<i>Bookkeeper</i>		<i>1.00</i>	<i>\$63,296</i>
<i>Human Resources</i>		<i>1.00</i>	<i>\$45,928</i>
<i>Curriculum Coordinator</i>		<i>1.00</i>	<i>\$114,667</i>
<i>Special Education Director</i>		<i>1.00</i>	<i>\$105,785</i>
<i>Special Education Director</i>		<i>0.50</i>	<i>\$52,893</i>
<i>Administrative assistant - Superintendent</i>		<i>1.00</i>	<i>\$65,607</i>
<i>Administrative assistant - Sped Director</i>		<i>1.00</i>	<i>\$58,078</i>
<i>Facility / Transportation Director</i>		<i>1.00</i>	<i>\$62,853</i>
<i>After School Program Director</i>		<i>1.00</i>	<i>\$75,000</i>
<i>Food Service Director</i>		<i>0.00</i>	<i>\$-</i>
<i>Technology Coordinator</i>		<i>1.00</i>	<i>\$68,119</i>
<i>Technology Support Specialist (1)</i>		<i>1.00</i>	<i>\$53,474</i>
<i>Technology Support Specialist (1)</i>		<i>1.00</i>	<i>\$40,890</i>
<i>Technology Support Specialist (1)</i>		<i>1.00</i>	<i>\$54,504</i>
<i>Technology Support Specialist (1)</i>		<i>1.00</i>	<i>\$54,504</i>
Total Central Office Staff - NEW SU Office Only:		16.5	\$1,236,246
Combined SU Central Office Expenses FY17:			\$1,547,526
Hypothetical SU Central Office Expense Combined:			\$1,236,246
Potential Savings with NEW SU Staffing Patterns			\$310,28

Note: The creation of a Side-by-Side Supervisory Union between Orange North and Washington South with the merging of two central offices into one, is estimated to save about \$334,000 union-wide. The projected savings for Washington and Orange in year one (ongoing) is approximately \$83,500 (25% of ADM) and the savings for Northfield and Williamstown in year one (ongoing) is approximately \$250,500 (75% of ADM).

Central Office Unification Savings:

Northfield/Williamstown: \$250,500 Orange/Washington: \$83,500

Appendix 2: Capital Debt, Operating Funds, Restricted Funds; July 1, 2016

General Fund:

Williamstown started year with a \$254,000 Fund Balance **Surplus** and Northfield started year with a \$88,800 Fund Balance **Deficit**.

My projections are that both Williamstown and Northfield School Districts will run small operating surplus in FY17 (2016-2017) school year.

Food Service:

Williamstown ended FY16 with a \$70,551 deficit. The deficit will be paid off in the following manner: \$35,000 was paid off in FY17 budget; the balance was budgeted in the FY18 (2017-2018) budget. By hiring a food service management company in FY17, we ensured that food service deficits will no longer happen.

Northfield ended FY16 with a \$88,535 deficit. Northfield has addressed this deficit through FY18 budget process and by raising prices for ensuing year and not filling open positions.

I will be recommending again that we contract out food service in FY18 so we stop piling up these huge deficits.

Reserve Accounts:

Northfield has a Capital Improvement Fund, audited fund balance on July 1, 2016 was \$78,346.

Williamstown the following reserve accounts, audited fund balance as of July 1, 2016:

- Capital Improvement Fund - \$104,314
- Roof Fund - \$84,091
- Tech Fund - \$33,038

Student Activity Accounts:

Both districts have student activity accounts. They operate the same way; as an in-out to pay for various school clubs and activities.

Both Northfield and Williamstown Middle High Schools carry \$75,000 in their activity accounts.

Both Northfield and Williamstown Elementary schools carry \$10,000 in their activity accounts.

Scholarships:

Northfield School District has scholarship funds and distribute approximately \$10,000 per year to qualified applicants. Williamstown School District does not have scholarship funds. Williamstown School District does have an endowment fund, but that is outside of the school.

Long term Debt:

Northfield has \$236,000 in long term debt - Principal only through 2029.

Williamstown has \$3,095,000 - Principal only through 2026.

Short Term Debt:

Both school districts took out Tax Anticipation Notes (TAN's) on July 1st.

- Williamstown - \$2,000,000
- Northfield - \$2,900,000

Appendix 3: Grants

Grants Data for Northfield and Williamstown – A Proposed Merger of Two Pk-12 Districts

All Grants are shown in FY16 (2015 - 2016) awarded funds								
WSSU	<u>Title I</u>	<u>Title II</u>	<u>IDEA B</u>	<u>IDEA B PreK</u>	<u>EPSDT</u>	<u>Medicaid</u>	<u>ADAP</u>	<u>21C</u>
	\$260,877	\$118,842	\$248,746	\$5,973	\$7,675	\$69,000	\$40,000	\$219,395
Grant:								
Title I	Primarily pays for interventionists and coaches SU wide.							
Title II	Pays for LAPDA and helps support PD opportunities SU wide.							
IDEA B	Funds WSSU EEE Teacher; Also helps support local budgets by paying for a large amount of contracted psychological services.							
IDEA B Prek	Helps to pay for SU wide contracted EEE OT and PT services.							
EPSDT	Supports various SU initiatives: Unified Sports, school gardens, girls on the run and a tooth tutor.							
Medicaid	Funds help pay for SU Medicaid Clerk, partially fund a BI, provides funding to Bridges, provides funds to the FFVP FTS coordinator and helps provide support for the unified sports program in WSSU.							
ADAP	Pays for a .20FTE School Health Coordinator and a .20FTE Substance Abuse Counselor.							

21C	FY 16 was Year 3 of grant. 21C money funded (75%) the Bridges program in WSSU.
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ONSU	Title I	Title II	IDEA B	IDEA B Prek	EPSDT	Medicaid	ADAP	21C
	\$285,052	\$69,851	\$230,474	\$4,971	\$25,000	\$100,000	\$-	\$87,400
Grant:								
Title I	Funded ELA and Math Interventionists SU wide. Provide Support for SU ONWARD/Afterschool Program.							
Title II	Funded both SU wide PD opportunities and partially funds (40%) of SU Co-Director of School Effectiveness							
IDEA B	Partially funded the following SU positions: Co-Director of School Effectiveness, Special Education Admin Asst, SU case manager, EEE staff member and paid for various contracted services (OT, PT, Evals, Consults)							
IDEA B PreK	Partially funded SU EEE staff member.							
EPSDT	Funds help pay for SU tooth tutor, SU playground equipment, nursing time and provides mini grants for various adventure based field trips.							
Medicaid	This money pays for 2 SU School to Home Coordinators.							
21C	FY 16 was Year 7 of grant. 21C money partially funded (47%) the ONWARD! program in ONSU.							

APPENDIX 4: STATEMENT OF VALUES

District	Acres	Value
Williamstown	45.22	\$ 22,097,300
Northfield	157.73	\$ 28,641,300

Member	Name	Property Type	Address 1	City	State	Zip	Building Value	Business Personal Property	Site Improvements Insurable	Computer Equipment	Books & Valuable Papers	Fine Arts	Mobile Equipment	Total Insured Value
WSSU #43	Northfield Jr/Sr High School	School	37 Cross Street	Northfield	VT	05663	\$ 17,541,000	\$ 1,200,000	\$ 77,600	\$ 60,000	\$ 20,000	\$ 2,500	\$ 100,000	\$ 19,001,100
WSSU #43	Maintenance Shed	Maintenance Building	Cemetary Street	Northfield	VT	05663	\$ 120,100	\$ 45,000	\$ -	\$ 5,000	\$ 500	\$ -	\$ 75,000	\$ 245,600
WSSU #43	Northfield Elementary School	School	10 Cross Street	Northfield	VT	05663	\$ 8,683,000	\$ 800,000	\$ 76,500	\$ 40,000	\$ 15,000	\$ 500	\$ 65,000	\$ 9,680,000
WSSU #43	Storage Building	Storage	Garvey Hill	Northfield	VT	05663	\$ 4,159	\$ 971	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,130
WSSU #43	STAR Program-Rental	School	38 Depot Square	Northfield	VT	05663	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
WSSU #43	Ranch Style Home	Dwelling	72 Garvey Rd	Northfield	VT	05883	\$ 175,000	\$ 10,000	\$ -	\$ 2,500	\$ 500	\$ -	\$ -	\$ 188,000
Member Total:							\$ 26,523,259	\$ 2,055,971	\$ 154,100	\$ 107,500	\$ 36,000	\$ 3,000	\$ 240,000	\$ 29,119,830
ONSU #29	Williamstown Elem School	School	100 Brush Hill Rd	Williamstown	VT	05679	\$ 4,288,700	\$ 277,000	\$ 95,000	\$ 60,200	\$ 2,500	\$ -	\$ 10,000	\$ 4,733,400
ONSU #29	Williamstown Elem-White House	School	100 Brush Hill Rd	Williamstown	VT	05679	\$ 136,200	\$ 3,000	\$ -	\$ 2,000	\$ -	\$ -	\$ -	\$ 141,200
ONSU #29	Williamstown Elem-White House #	School	100 Brush Hill Rd	Williamstown	VT	05679	\$ 145,900	\$ 10,000	\$ -	\$ 2,000	\$ -	\$ -	\$ 1,000	\$ 158,900
ONSU #29	Williamstown Middle/High School	School	120 Hebert Rd	Williamstown	VT	05679	\$ 12,644,000	\$ 890,300	\$ 190,300	\$ 200,000	\$ 5,000	\$ 5,000	\$ 57,500	\$ 13,992,100
ONSU #29	Williamstown M/H Garage	Garage	120 Hebert Rd	Williamstown	VT	05679	\$ 9,000	\$ 5,000	\$ -	\$ -	\$ -	\$ -	\$ 10,000	\$ 24,000
ONSU #29	Williamstown M/H Greenhouse	Greenhouse	121 Hebert Rd	Williamstown	VT	05679	\$ 75,000	\$ 5,000	\$ -	\$ 8,000	\$ -	\$ -	\$ -	\$ 88,000
ONSU #29	Boiler Woodchip Building	Mechanical Building	120 Hebert Road	Williamstown	VT	05679	\$ 304,000	\$ 10,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 314,000
Member Total:							\$ 17,602,800	\$ 1,200,300	\$ 285,300	\$ 272,200	\$ 7,500	\$ 5,000	\$ 78,500	\$ 19,451,600

Appendix 5: Unified High School Program/Sectioning Analysis

Northfield/Williamstown HS – Program/Sectioning Analysis: Potential Savings for a Unified High School do to Restructuring

Williamstown			Northfield			Unified District					
Subject	Sections	Students		Sections	Students		Current Sections	Total Students	Sections Needed	Saving in Sections	Adds in Sections
English											
English Seminar 11/12	2	17		Senior Seminar	1	14		3	31	2	1
Learning to Learn 9/10	2	7									
English 9	3	48		Am. Lit 9/Lang Arts 9	1 and 1	25/12		5	85	4 or 5	0
English 10	3	39		World Lit 10	2	27		5	66	4	1
Memoire 11/12	1	8									
AP Lit/Lang 11/12	1	10		AP Lit	1	7		2	17	1	1
Journalism 1 11/12	1	19			0			1	19	1	0
Journalism 2 11/12	1	21			0			1	21	1	0
Reader's Workshop 11/12	1	12						1	12	1	0
				Creative Writing/Public Speaking	1	11		1	11		
				AP Lang	1	13		1	13		

Math													
Algebra 2	2	25		Alg 2	2	19		4	44		3		1
Pre Calc	1	14		Pre Calc	1	5		2	19		1		1
Calculus	1	9		Calc	1	2		2	11		1		1
Prob/Statistics	1	5		0	0	0		0	0		1		0
SAT Prep	1	5		0							1		0
Algebra 1	3	37		Alg 1	3	41		6	78		4		2
Geometry	3	34		Geom	2	32		5	66		4		1
Financial Literacy	1	13		Math for Business	1	6		2	19		1		1
LIFE	1	8											0
				Alg/Trig	1	14		1	14		1		0
Social Studies													
U.S. History 11	2	30						2	30		*		1
Global 10	3	39		World Hist 10	2	38		5	77		4		1
Psychology 11/12	1	9		Psych/Soc	1	20		2	29		2		0
AP Psychology	1	13											
Cont. Issues 11/12	1	13											
Social Studies 9	3	48		US 9	2	41		5	89		4 or 5		0

AP Micro/Macro Ec 11/12	1	12											
				GPE 11	3	46		3	46		*		
World Language													
French 1	2	27		French 1	1	18		3	45		2 or 3		0
French 2	1	15		French 2	0.5	6		1.5	21		2		0
French 3	1	5		French 3	0.5	2		1	7				0
				Span 1	1	12		1	12		1		1
				Span 2	1	15		1	15		1		1
				Span 3	1	5		1	5		0		
PE/Health/ Driver Ed													
PE	6	96		PE	3*	57		12	153		8		1*
Driver Ed	2	31 (.5 FTE)		Driver Ed	1	23 (.6 FTE)							
Health 9	2	56		Health 10	4	45		6	101		6		0
Art/Music													
Art 1	2	33		Art 1	1	17		3	50		3		0
Art 2	1	13		Adv Art	1	5		2	18		1		0.5
Ceramics	1	9		Ceramics 1/2	1	17		2	26		2		0
Painting	1	11						1	11		1		0
				Tech Art	1	12		1	12		1		0

Roots of Rock	1	12		Stage Band	1	13		2	25		1		1	
HS Chorus	1	6		1	18			2	24		1		1	
HS Band	1	17		1	3			2	20		1		1	
Science														
Honors Bio	1	20		AP Bio	1	7		2	27		2			
Honors Physics	1	14												
General Chemistry	1	7		Sci 3	1	13		2	20		1 or 2			
Intro Bio/Chem 10	3	36		Sci 2	2	38		5	74		4		1	
Earth Sci/Physics 9	3	53		Sci 1	2	39		5	92		5		0	
Anatomy	1	7												
				Chem 11	2	28		2	28		2			
Consumer Science														
				Home Ec	1	16								
				Wood Tech	1	11								
											Total "Savings" in Sections		17.5 sections	
											Total "Savings" in Teacher FTE"		3.5 FTE	
											Total Dollars for		~ \$300,000.00	

								Program Enhancement	
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Appendix 6. Elementary Unified Arts Comparison

	Northfield			Williamstown	
	Interval	Minutes		Interval	Minutes
PreK					
Art	Week	40		Week	40
PE	Week	40		Week	40
Music	Week	40		Week	40
Library	Week	40		Week	40
Kindergarten					
Art	Week	40		Week	45
PE	Week	40		Week	90
Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
1st Grade					
Art	Week	40		Week	45
PE	Week	40		Week	90
Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
2nd Grade					
Art	Week	40		Week	45
PE	Week	40		Week	90
Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
3rd Grade					
Art	Week	40		Week	45
PE	Week	40		Week	90
Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
4th Grade					
Art	Week	40		Week	45
PE	Week	40		Week	90

Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
Band/Chorus				Week	45
5th Grade					
Art	Week	40		Week	45
PE	Week	40		Week	90
Health	week/for one quarter	40		Week	45
Music	Week	40		Week	45
Library	Week	40		Week	45
Band/Chorus				Week	45

Appendix 7: Performance Data

Northfield/Williamstown Smarter Balanced Testing Results: 2014-2016

Note: NA means not a large enough student cohort for reliable data

Williamstown							Northfield						
SBAC							SBAC						
2014-2015 Math	All	VT	FR&R	VT	Sp Ed	VT	2014-2015 Math	All	VT	FR&R	VT	Sp Ed	VT
3	36%		36%		NA		3	38%		16%		NA	
4	31%		29%		9%		4	33%		6%		NA	
5	20%		17%		6%		5	15%		5%		NA	
6	12%		18%		NA		6	23%		4%		NA	
7	17%		13%		NA		7	33%		21%		NA	
8	16%		10%		NA		8	28%		27%		NA	
11	20%		NA		NA		11	30%		NA		NA	

SBAC							SBAC						
2014-2015 ELA	All	VT	Free & Re	VT	Special Ed	VT	2014-2015 ELA	All	VT	Free & Re	VT	Special Ed	VT
3	31%		22%		NA		3	39%		12%		NA	
4	45%		NA		NA		4	44%		22%		NA	
5	23%		11%		NA		5	28%		25%		NA	
6			37%		NA		6	39%		21%		NA	
7	26%		13%		NA		7	56%		50%		NA	
8	40%		27%		27%		8	31%		NA		NA	

11	42%		NA		NA			11	41%		NA		NA	
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Williamstown							Northfield							
SBAC							SBAC							
2015-2016-Math	All	VT	FR&R	VT	Sp Ed	VT	2015-2016-Math	All	VT	FR&R	VT	Sp Ed	VT	
3	52%	56%	40%	41%	NA	18%	3	32%	56%	25%	41%	N/A	18%	
4	52%	50%	52%	32%	NA	14%	4	17%	50%	11%	32%	N/A	1400%	
5	56%	43%	NA	28%	NA	10%	5	24%	43%	18%	28%	N/A	10%	
6	14%	41%	13%	25%	NA	5%	6	22%	41%	16%	25%	N/A	5%	
7	21%	46%	28%	28%	NA	6%	7	50%	46%	39%	28%	N/A	6%	
8	17%	44%	12%	26%	NA	4%	8	43%	44%	24%	26%	N/A	4%	
11	31%	37%	NA	19%	NA	1%	11	35%	37%	N/A	19%	N/A	1%	

2015-2016 ELA	All	VT	FR&R	VT	Special Ed	VT	2015-2016 ELA	All	VT	Free & Re	VT	Special Ed	VT
3	41%	54%	40%	39%	NA	14%	3	34%	54%	31%	39%	N/A	14%
4	50%	54%	42%	37%	NA	13%	4	45%	54%	28%	37%	N/A	13%
5	56%	58%	NA	42%	NA	14%	5	38%	58%	25%	42%	N/A	14%
6	34%	56%	20%	39%	NA	11%	6	48%	56%	36%	39%	N/A	11%
7	40%	58%	50%	39%	NA	9%	7	70%	58%	56%	39%	N/A	9%
8	12%	59%	8%	41%	NA	11%	8	58%	59%	41%	41%	N/A	11%
11	61%	57%	NA	38%	NA	10%	11	70%	57%	N/A	38%	N/A	10%

Vermont Smarter Balanced Testing Scores: 2015/2016
Disaggregated Statewide Results
Percentage of Students Proficient or Above

Grade		2015 English Vermont	2016 English Vermont		2015 Math Vermont	2016 Math Vermont
3						
	All	51%	54%		51%	56%
	Not Free & R	64%	65%		64%	67%
	Free and R	45%	39%		35%	41%
	Special Ed	12%	14%		15%	18%
4						
	All	51%	54%		44%	50%
	Not Free & R	62%	66%		56%	62%
	Free and R	35%	37%		29%	32%
	Special Ed	11%	13%		10%	14%
5						
	All	56%	58%		41%	43%
	Not Free & R	69%	68%		52%	53%
	Free and R	39%	42%		25%	28%
	Special Ed	11%	14%		6%	10%
6						
	All	53%	56%		47%	41%
	Not Free & R	65%	67%		48%	51%
	Free and R	35%	39%		21%	25%
	Special Ed	7%	11%		3%	5%
7						
	All	55%	58%		43%	46%
	Not Free & R	66%	69%		53%	56%
	Free and R	36%	39%		26%	28%
	Special Ed	8%	9%		3%	6%
8						
	All	53%	59%		40%	44%
	Not Free & R	63%	68%		49%	54%
	Free and R	36%	41%		24%	26%
	Special Ed	8%	11%		3%	4%
11						
	All	57%	57%		37%	37%
	Not Free & R	65%	65%		44%	45%
	Free and R	39%	38%		20%	19%

	Special Ed	10%	10%		2%	1%
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**Vermont Smarter Balanced Testing Results 2016
Top Ten/Twenty Schools Testing Results**

	English ALL Top 10	English ALL Top 20	English FRL Top 10	English FRL Top 20	Math ALL Top 10	Math ALL Top 20	Math FRL Top 10	Math FRL Top 20
Grade								
3	83-96%	77-96%	58-82%	47-82%	81-92%	79-92%	59-80%	50-80%
4	80-89%	75-89%	48-85%	42-85%	81-90%	75-90%	53-85%	38-85%
5	84-96%	78-96%	63-79%	50-79%	73-85%	64-85%	44-72%	36-72%
6	80-94%	75-94%	50-83%	42-83%	73-89%	63-89%	36-46%	25-46%
7	77-94%	73-94%	54-73%	47-73%	67-85%	62-85%	40-64%	31-64%
8	80-94%	77-94%	55-79%	47-73%	68-82%	63-82%	37-64%	33-64%
11	71-82%		54-85%		48-67%		28-44%	

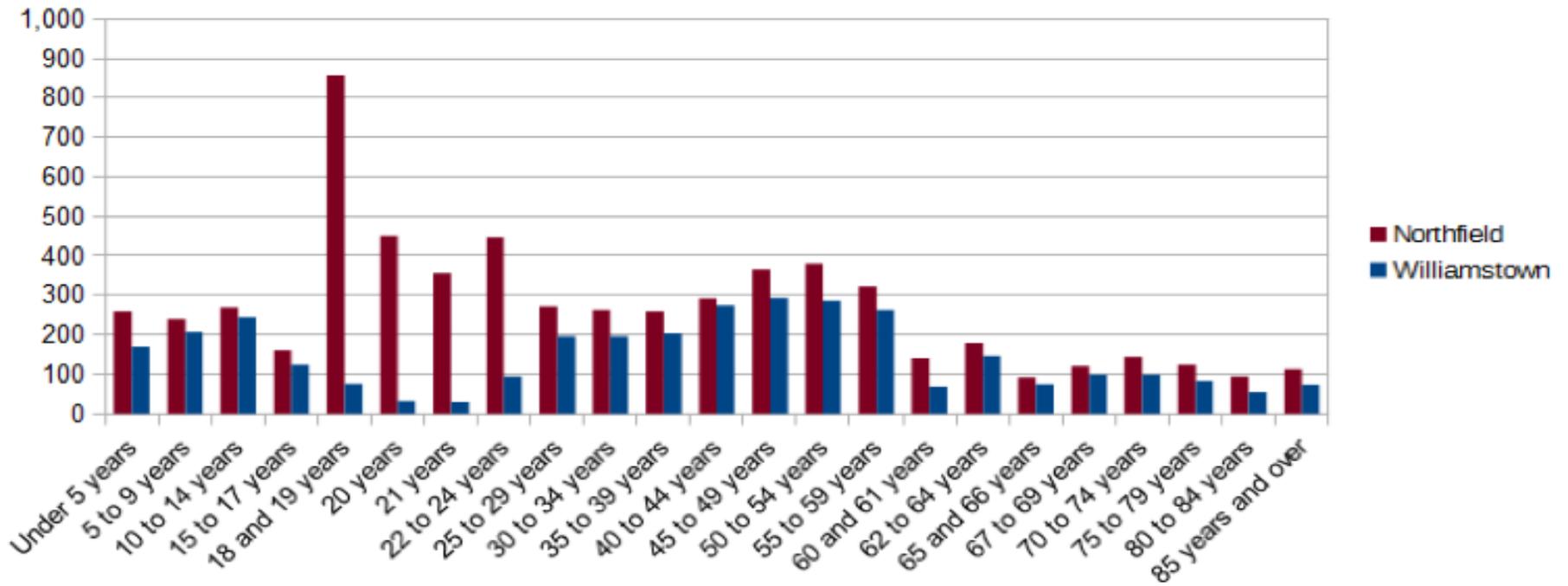
Note:

Chart shows the percentage of students who scored proficient or above of the ten (and twenty) highest scoring public schools in Vermont for all students and for lower income students (FRL = Free or Reduced Lunch)

APPENDIX 8: ENROLLMENT AND BUDGET TRENDS

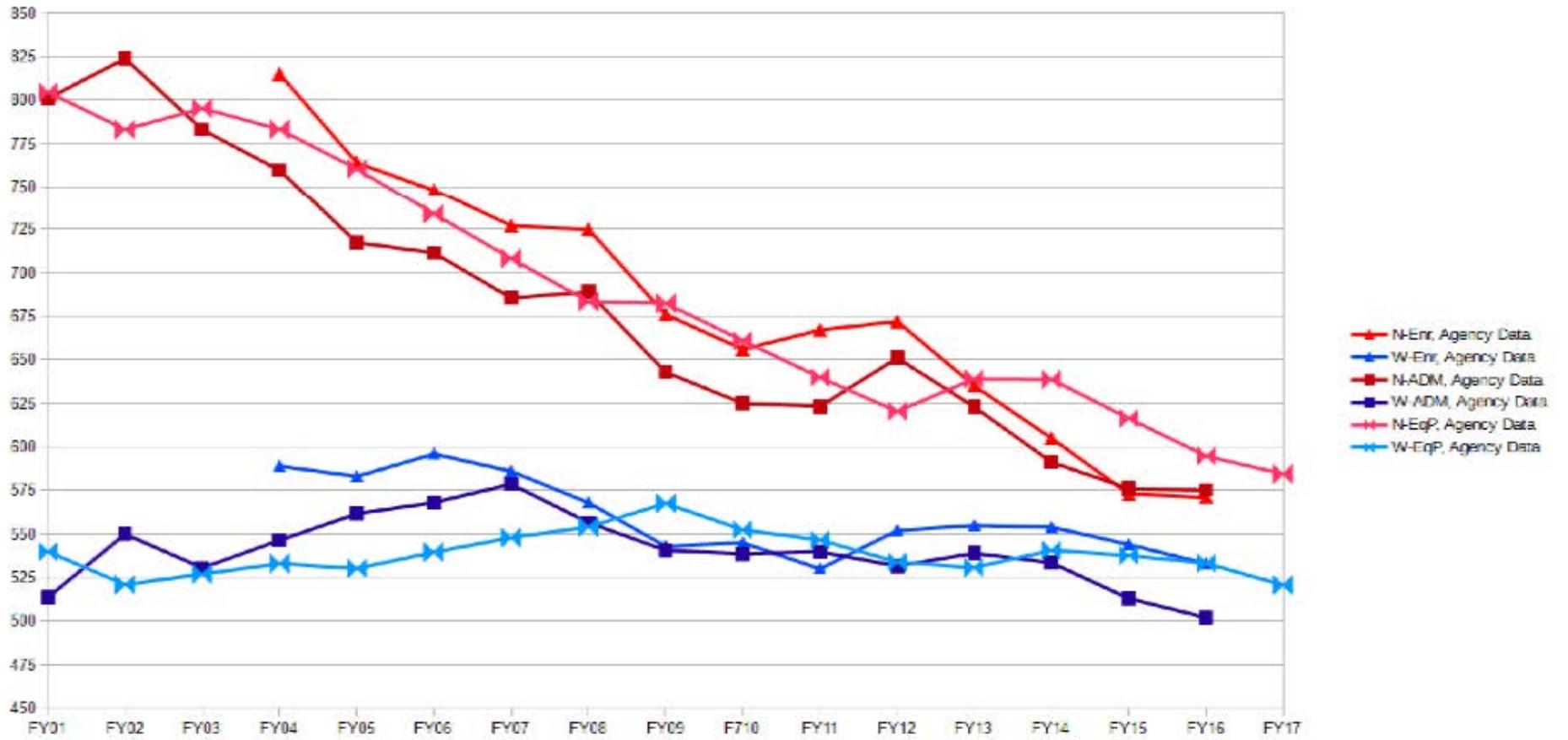
Census Data - age grouping

total count by age group



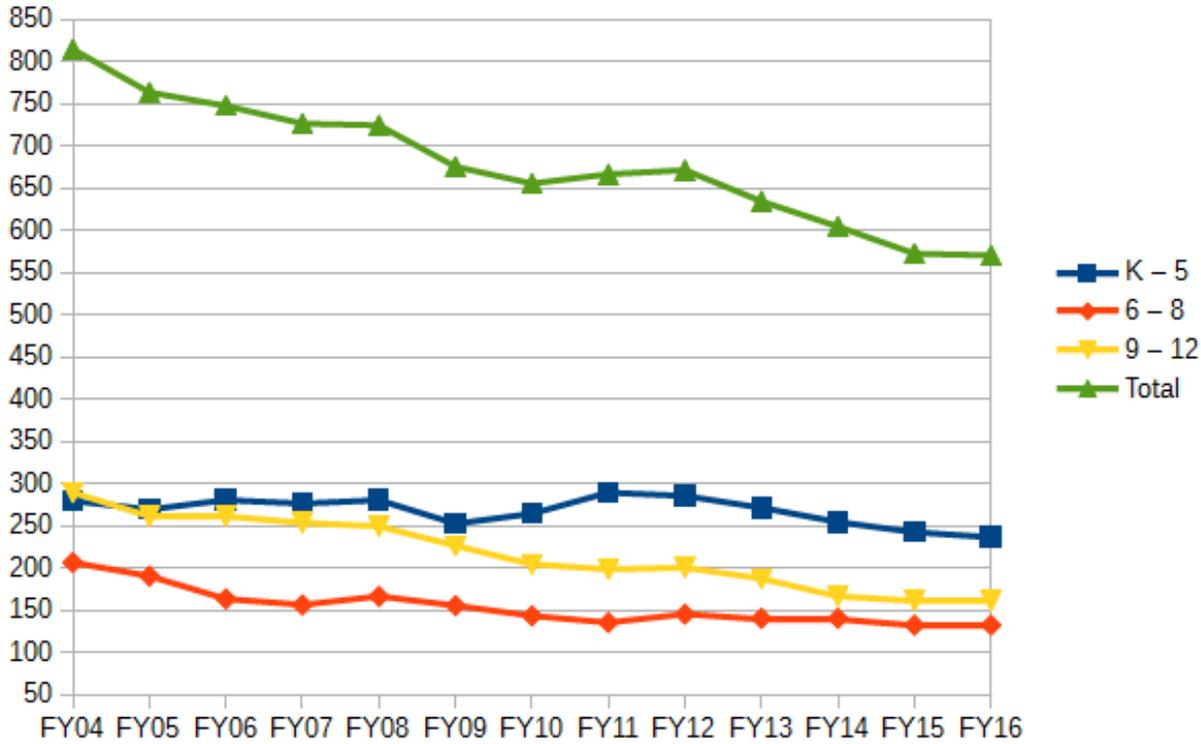
STUDENT COUNTS

Item L-2

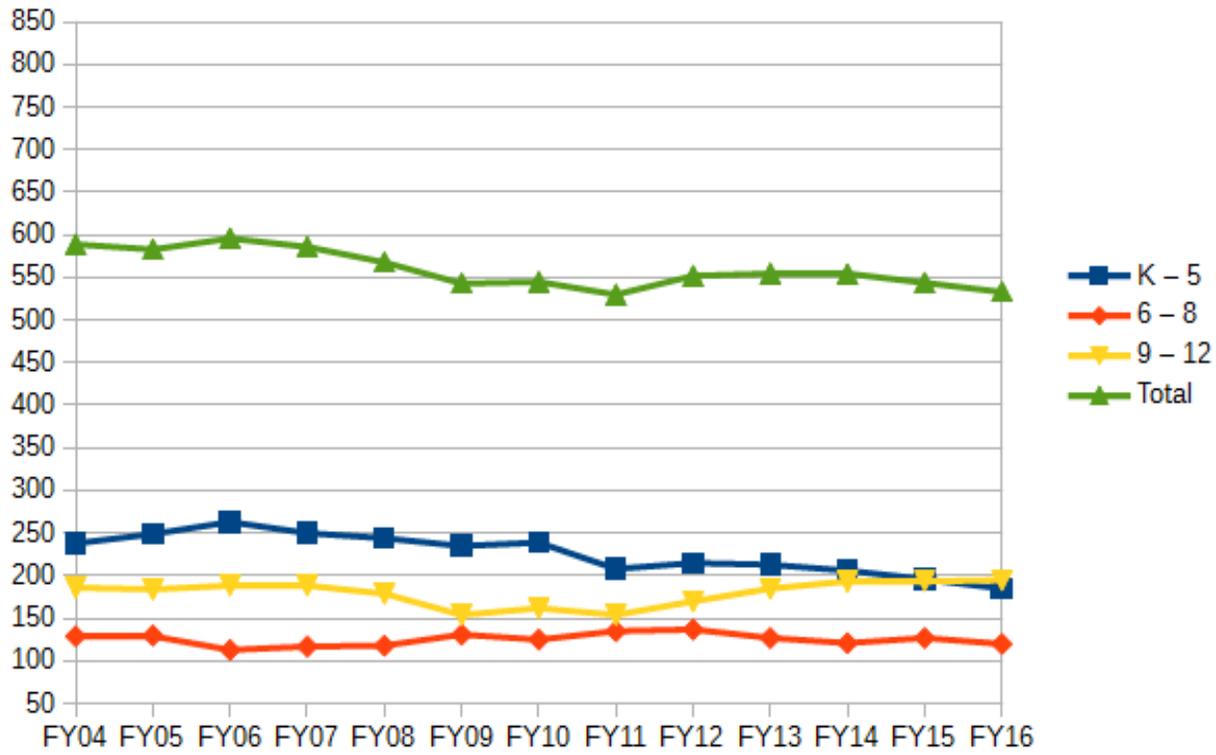


ENROLLMENT BY GRADE CLUSTERS

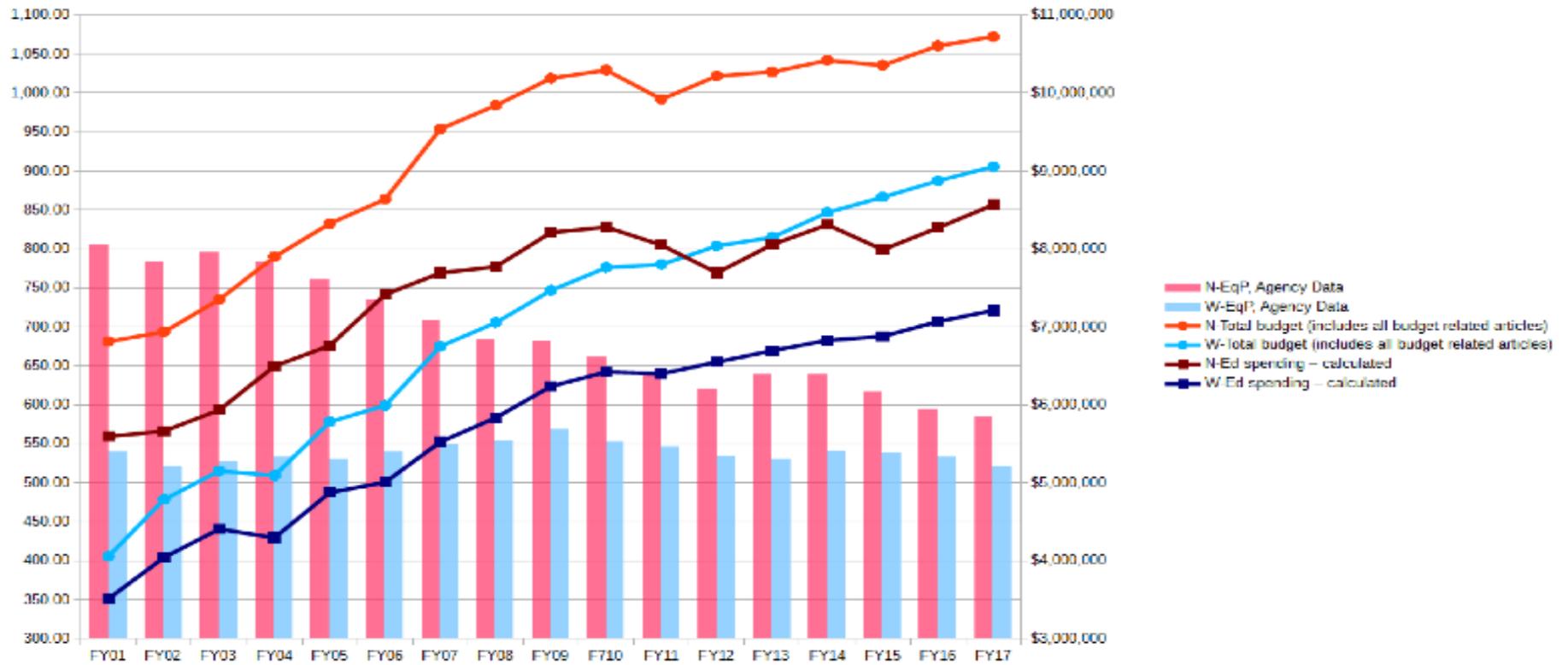
NORTHFIELD ENROLLMENT



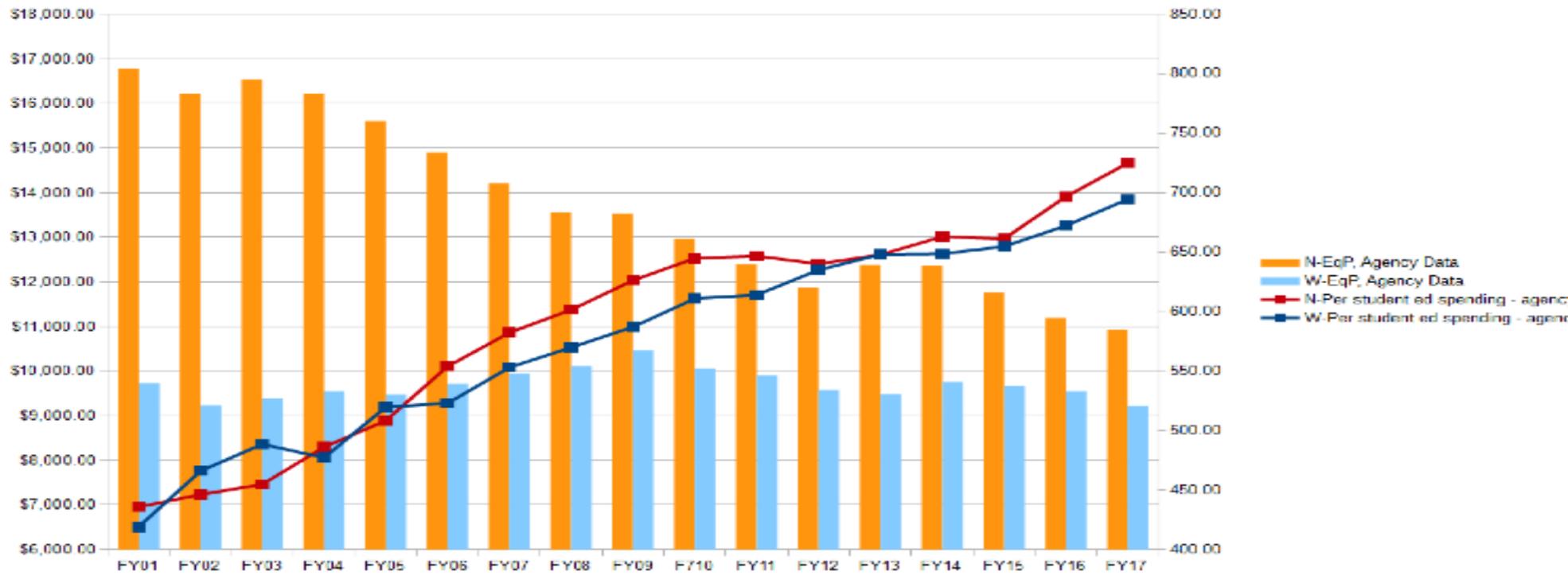
WILLIAMSTOWN ENROLLMENT



HISTORICAL TOTAL BUDGETS



HISTORICAL EDUCATION SPENDING PER EQUALIZED PUPIL



Appendix 9: Census Data for Board Representation

2010 Census Information:

<i>Northfield</i>	<i>6207</i>	<i>65%</i>
<i>Williamstown</i>	<i>3389</i>	<i>35%</i>
<i>Total</i>	<i>9596</i>	

Appendix 10: Study Committee Meetings and Public Forums

COMMITTEE MEETINGS:

03/24/2016
04/05/2016
04/19/2016
05/03/2016
05/17/2016
06/07/2016
06/21/2016
07/20/2016
08/04/2016
08/18/2016
09/01/2016
09/07/2016
09/20/2016
10/05/2016
10/18/2016
11/02/2016
11/15/2016
11/30/2016
12/11/2016
01/12/2017
02/02/2017
02/16/2017

FORUMS AND PRESENTATIONS:

08/01/2016 - Ainsworth Library, Williamstown
09/07/2016 - Ainsworth Library, Williamstown
10/17/2016 - Williamstown United Federated Church, Williamstown
10/18/2016 - Woods Lodge, Northfield
11/14/2016 - Williamstown MHS student, Williamstown
01/23/2017 - Two presentations at Williamstown MHS
01/30/2017 - Two presentations at Northfield MHS

Appendix 11: Sample Warning

WARNING

The voters of the _____Town School District are hereby notified and warned to meet on the 2nd day of May, 2017 to vote by Australian ballot between the hours of 7:00 a.m., at which time the polls will open, and 7:00 p.m., at which time the polls will close, upon the following articles of business:

ARTICLE I

Shall the voters of the _____Town School District vote to form the Central Vermont Unified Union School District ("Unified District") on the following terms:

1. The School Districts of Northfield and Williamstown are necessary for the establishment of the Central Vermont Unified Union School District and are hereinafter referred to as the "Forming Districts."
2. The Unified District shall be formed and the terms hereby voted shall become effective on the date this article is approved by a majority vote of the electorate of each Forming District voting in a meeting for adoption of this article and said votes become final pursuant to 16 V.S.A. 706g. The Unified District will assume full operations on July 1, 2018.

If the Unified District is formed and if the voters of the Orange School District and the Washington School District vote to approve the formation of the Orange Washington Unified Union School District and said vote becomes final and that district becomes operational on July 1, 2018, then both new unified union school districts would be members of a new supervisory union and would meet the criteria of "Side-by-Side" mergers pursuant to 2012 Acts and Resolves No. 156.

3. The name of the district shall provisionally be the Central Vermont Unified Union School District.
4. The Central Vermont Unified Union School District will operate grades Pre-Kindergarten through grade 12.
5. The Central Vermont Unified Union School District will provide for the transportation of students, assignment of staff, and curriculum that is consistent with the practices/contracts, collective bargaining agreements, and provisions of law that are in effect during the first year that the new Unified District is providing full educational services and operations.
6. The Central Vermont Unified Union School District shall assume all capital debt as may exist on June 30, 2018, including both principal and interest, of the forming school districts that joined the new union district.

The Central Vermont Unified Union School District shall assume any and all operating deficits, surpluses, and fund balances of the forming districts that may exist on the close of business on June 30, 2018. In addition, reserve funds identified for specific local purposes will be transferred to the Central Vermont Unified Union School District, and will be applied for their original established purposes unless otherwise determined through appropriate legal procedures.

The Forming Districts will transfer to the Central Vermont Unified Union School District any preexisting specific endowments, scholarships, or other restricted accounts, including student activity and related accounts, held by school districts that may exist on June 30, 2018. Scholarship accounts or similar accounts, held by the forming districts prior to June 30, 2018, that have specified conditions of use will be used in accordance with said provisions.

7. No later than June 30, 2018, the Forming Districts will convey to Central Vermont Unified Union School District, for the sum of one dollar, and subject to the encumbrances of record, all of their school-related real and personal property, including all land, buildings, and content.

8. The Central Vermont Union School District shall be governed by a nine (9) member Board of Directors elected by Australian ballot for three-year terms, except for those initially elected at the time of the formation of the new Unified District:

- A. Five (5) residing in and representing the Town of Northfield; and
- B. Four (4) residing in and representing the Town of Williamstown.

9. An initial Board of Directors shall be elected at the town school district special meetings to be held on May 2, 2017. The terms of the initial Board of Directors are set forth in the Articles of the Agreement. Upon expiration of the respective terms of the initial Board of Directors, successors shall be elected for terms as specified by law.

10. The Articles of Agreement and the Final Report of the Act 46 Study Committee is on file at the offices of the Washington South Supervisory Union and the Orange North Supervisory Union and shall govern the Unified District.

ARTICLE II

To elect ___ Directors to serve on the Central Vermont Unified Union School District Board from the date of the organization meeting for terms as provided in the Final Report, from the following nominees:

1. (name)
- 2.
- 3.
- 4.
- 5.