

LAMOILLE SOUTH SUPERVISORY UNION

PROPOSAL FOR AN ALTERNATIVE GOVERNANCE STRUCTURE

Submitted by
**Elmore-Morristown Unified Union School District
and
Stowe School District**

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Table of Contents

Executive Summary	3
Fast Facts	11
Background and Context	12
Committee Membership	18
Self-Evaluation	19
Baseline/Demographics.....	20
Program Review	30
Student Performance.....	38
Operational Efficiency.....	49
Transparency, Accountability, Community Engagement	67
Appendices	70
Phase 1 Intro and Executive Summary.....	71
Excerpts from LSSU Optional Educational Structures Report	82
Regional Education Committee Recommendation.....	86
Excerpts from EMUU Final Report and Articles of Agreement	87
LSSU Act 46 Tax Projections.....	89
SSD & EMUU Program Review	94
Student Assessment Data	97
LSSU Comprehensive Plan for Continuous Improvement.....	109
LSSU Mission.....	121
VSAC Post-Secondary Survey Results.....	122
VT High School Post-Secondary Study	130
Wolcott Unification Financial Data	134
Wolcott School Board Meeting Minutes	135
LSSU Geography.....	136
LSSU Act 46 Meeting Dates	138

**LAMOILLE SOUTH SUPERVISORY UNION
PROPOSAL FOR AN ALTERNATIVE GOVERNANCE STRUCTURE**

EXECUTIVE SUMMARY

Introduction:

Nine years of strategic reflection concerning the operations and direction of the Lamoille South Supervisory Union and its member communities – Elmore, Morrystown, and Stowe – has resulted in unprecedented levels of transparency, accountability, and community engagement. We are not the same Supervisory Union we once were. Working together, both districts individually and jointly are meeting and exceeding the goals of Act 46: equity and opportunity, quality, efficiency, transparency and accountability, and value. Our LSSU Action Plan commits our boards and administration – regardless of future turnover – to continued cooperation in service of these goals.

Proposed Alternative Structure:

The Elmore-Morrystown Unified Union (EMUU) and Stowe School Districts (SSD) propose to continue as side-by-side PreK-12 operating districts assigned to the Lamoille South Supervisory Union (LSSU).



Operating PreK-Grade 12
3 schools
815 students



Operating PreK-Grade 12
4 schools
912 students

A Brief Illustration:

In the fall of 2016, Elmore and Morristown began their first year as a unified union. At the same time, the board of the new district began meeting regularly with their neighbors – the Stowe School Board – to discuss forming an Alternative Governance Structure. Those conversations were bolstered by a robust review of programming and data across the supervisory union, and both boards saw some glaring inequities.

While there had long been a need for a foreign language teacher at the elementary and middle levels in Elmore and Morristown, it wasn't until EMUU began more significant and open communications with its partner in Lamoille South that the EMUU board really began to consider how to close the gap between the robust foreign language exposure that Stowe students were getting and EMUU students' exposure. EMUU's board worked to find a way to extend its foreign language program throughout all schools.

Meanwhile, next door, Stowe's school board was concerned about the significant achievement gap between students who received Free and Reduced Lunch and students who did not. The achievement gap is, of course, a state and national issue. However, Stowe's gap was more significant than EMUU's, a fact which became apparent as the two boards looked at the data for the entire supervisory union. Because Stowe's Free and Reduced Lunch (FRL) program is small – approximately 13% of Stowe's students – the board knew it had an opportunity to tackle the achievement gap in their town, while districts with a larger FRL program might not be able to. The board asked the administrators what they needed to help all students reach benchmarks and then found a way to provide a literacy interventionist in the elementary school and a literacy coach on the secondary level.

These two instances – EMUU's foreign language program and Stowe's literacy gap – are just two examples of how fruitful our conversations around Act 46 have been. Act 46 has brought us together and made us a tighter team working together for all our students. As a result of that collaboration, we are able to focus on the distinctive needs of our individual districts, targeting our resources towards providing an equitable and quality education in both towns.

Summary Argument #1: Alternative Structure as “Best Means”

Introduction: Governance Alternatives in LSSU:

Through nine years and six phases of thoughtful self-evaluation, LSSU has evaluated three separate governance structures in order to assess the best means for achieving the educational, fiscal, and operational goals of Act 46:

1. Maintaining the SU's original operating structure of three autonomous school boards.
2. Merging all three districts into one unified union operating district with a single board.
3. Merging Elmore and Morristown into a single unified union district with a single board, within the context of a new Supervisory Union Structure representing the EMUU and Stowe school districts.

Through these evaluations, we found that the current structure of LSSU (option three) is the best means of achieving the goals of Act 46.

Given the emerging financial and educational realities facing the Elmore School, we successfully unified the districts of Elmore and Morristown, resulting in more stable enrollment trends and a sustainable mass of students in our schools. Unification resulted in greater programmatic opportunities and enhanced collaboration among our educators. Further, the merger resulted in a combined savings of \$470,000, with minimal impact on Morrisville taxpayers and a tax reduction of 31.5 cents for Elmore.

Our self-study process provides real and conclusive evidence that:

1. The current supervisory union structure is leading students across LSSU to achieve or exceed the State's educational quality standards as measured by a range of state and local performance assessments and post-graduation studies.
2. Both EMUU and Stowe are operationally lean districts delivering a quality educational program in an operationally efficient manner. LSSU has already wrung out of its operations, particularly in the union of Elmore and Morristown, efficiencies that benefit students and taxpayers.
3. Creating a single, unified budget assessed across the grand lists of Elmore, Morristown, and Stowe would result in no discernable increase in educational opportunity or equality (educational or financial), nor result in marked savings for taxpayers.
4. Changes in the operating structure of LSSU create unnecessary burdens on the capacity of our central office team to effectively complete the successful implementation of the already approved merger between Elmore and Morristown.

Governance Option 1 - Preferred Structure as "Best Means":

Our self-studies considered the potential benefits of restructuring the delivery of education services, specifically the costs and benefits of consolidating the middle and high schools through a full unification of our districts. The decision to advocate for a focused merger between Elmore and Morristown was made after a thorough consideration of whether a full unification of all three districts into one unified union was educationally and fiscally warranted. The central question in considering a full merger of governance structures in our region was whether or not we could establish a clear and decisive picture of the educational and financial benefits that might be derived from such a merger. After nine years of ongoing strategic reflection, we have concluded such a change is not necessary or in the best interests of our children.

Barriers to Merger:

Central to LSSU's Regional Education District studies' examination of a merger between the school districts of Elmore, Morristown, and Stowe into a "preferred structure," was the recommendation to restructure the middle and high schools in both Morristown and Stowe to create a unified middle school in one community and a unified high school in the other as the primary means for achieving greater operational efficiency and improving educational performance for all students.

However, after a thorough examination of this option, the R.E.D. study found:

- No evidence that the wholesale re-organization of two high-performing K-12 districts would lead to greater educational opportunity or improved student performance – and could, in fact, lead to the opposite result.
- The very real impact on a significant portion of our student body of longer bus rides, given the geographic size of our SU. The RED study was particularly concerned about ensuring access by all students to fully participate in after-school activities without compromising their ability to complete their homework due to late home arrivals.
- The perceived loss of community identification with and support for their schools.
- Evidence of an unequal shifting of future tax burdens among the communities of Elmore, Morristown, and Stowe – even when the merger was incentivized.

Summary Finding - Preferred Structure as “Best Means”:

Our self-study concluded that a governance unification of the districts of EMUU and Stowe without re-structuring provided no additional educational or fiscal opportunities for meeting the goals of Act 46, and unifying our districts with the intent of restructuring schools that already are among the best in the state posed significant drawbacks with no evidence of potential benefits.

Governance Option 2 – Supervisory Union Structure as “Best Means”:

A **supervisory union structure** can, when effectively implemented in the right context (particularly between two districts with a shared strategic vision and history of operational cooperation), provide students and communities with educational programs of the highest quality in a fiscally responsible manner. Our SU structure enables our districts to plan our shared future while allowing agility in our work. We develop and refine programs and policies in one district, then scale them to the whole supervisory union.

EMUU and Stowe are not siloed educational governance structures, intent on simply focusing on their own needs or exercising their local prerogatives. Our current model of governance has already led to the following educational and operational improvements:

1. Enhanced board knowledge of all our schools and the children they serve.
2. Established new patterns of PreK-12 strategic thinking and planning across our supervisory union.
3. Provided new opportunities to learn from each other’s unique practices and apply the best innovative ideas across our schools.
4. Led to the creation of coordinated policies, goals, and initiatives aimed at:
 - a. The effective coordination and implementation of targeted instructional improvement plans.
 - b. The alignment of instructional and social-emotional support programs across the supervisory union.

- c. The institution of student information system and data management tools enabling our principals and teachers more effectively to use individual and aggregate student data to identify student needs, allocate and share resources, and improve instruction.
 - d. A unified program of educator recruitment, support, and professional development.
5. Resulted in joint planning and accountability systems focused on:
- a. A sustained emphasis on analyzing common data points across all schools, programs, and students.
 - b. Agreed upon strategic priorities at the board, administrative, and instructional levels.
 - c. The promotion of clear and transparent vertical curriculum alignment.
 - d. The communication of a clearer, more focused, more integrated picture of the work being undertaken in our schools, including yearly updates on academic progress formally presented in every community.

Summary Finding – Alternative Structure as “Best Means”:

LSSU has demonstrated an unwavering commitment to providing students across all three towns and both school districts with a high-quality education at a cost that parents, voters, and taxpayers value. The successes of the initiatives we have already implemented over the past nine years are conclusive evidence that our proposed structure works – evidence that supports the conclusion that individually and collectively the districts of EMUU and Stowe under the leadership of the LSSU are exceeding the goals of Act 46.

We remain committed to continuing the implementation of changes that will serve to promote quality, equity, and cost savings across our schools. Reflected throughout this report are the concrete actions that EMUU and Stowe have taken and intend to take, jointly and separately, to achieve that goal.

Summary Argument #2: Meeting the Goals of Act 46 (Findings and Action Plans)

Introduction:

LSSU is committed to serving all our students equitably and effectively, regardless of the district in which they attend school. Our governance boards learn from each other as we continuously work to improve educational outcomes for LSSU students in the most cost-effective manner possible.

Student population trends in EMUU and Stowe create specific profiles of educational need in each of the communities we serve. The particular profile of student need facing each of our districts requires systemic cooperation between our districts, coupled with operational flexibility. This combination of cooperation and agility allows each district to marshal the requisite resources and design educational programming to meet the needs and aspirations of our students.

Equity, Opportunity, and Performance: Since 2007, both districts have actively participated in creating and implementing the LSSU Action Plan, the result of our shared commitment to continuous academic improvement. Working together, EMUU and Stowe have already achieved substantive equity and increased the variety of educational opportunities for our students and have plans for continuing these gains. Examples of increased equity include the inclusion of full-day kindergarten for all students across all districts and access to technology. EMUU schools expanded language education through the addition of Spanish language teachers, while Stowe students are enjoying additional language and math specialists for non-proficient learners. LSSU invested in STAR software to better track student performance in all elementary schools. The entire supervisory union is working together to initiate personal learning plans in conjunction with a new proficiency based reporting system.

Operational Efficiency: Both districts deliver education at a spending level less than the state average, making our supervisory union a low-cost, high-quality educational leader in Vermont. Both EMUU and Stowe are operationally lean districts and we can find no evidence to suggest that unification would lead to greater operational savings. That work has already been accomplished. Therefore, creating a single, unified budget assessed across the grand lists of Elmore, Morristown, and Stowe would result in no discernable increase in LSSU's capacity to increase educational opportunity or equality, nor would it result in marked savings for taxpayers.

Transparency, Accountability, and Value: Our communities have demonstrated an ongoing and unwavering commitment to providing students across our three towns and two school districts a high-quality education within governance structures and at a cost that they value as evidenced by:

- community support for the educational and operational initiatives our supervisory union has taken in response to the six studies we have undertaken;
- the transparency and accountability that is built into the operation culture of our supervisory union as a result of community support for ongoing self-reflection and continuous improvement;
- student survey data indicating that our educational environment is safe, welcoming, and challenging;

- the high levels of community engagement throughout this process, including the successful merger vote between the communities of Elmore and Morristown;
- the unwavering financial support our citizenry has shown their schools by consistently passing district budget appropriations across LSSU; and
- support by extensive and effective school to community communication strategies grounded in district websites and social media in conjunction with continuing coverage of all district affairs by a local and vibrant press – *The Stowe Reporter* and *The News and Citizen*.

We recognize that there may come a time when the demographic or financial pictures change, demanding additional reconsideration of governance and operational structures. The realities we face are fluid and evolving. That is why our LSSU Action Plan is designed to ensure a systemic commitment to board and district cooperation in service of the goals of Act 46. The change has already begun with us, but needs to become more deeply embedded in the educational ethos of the communities we serve. To this end, we commit ourselves to the task of stewarding throughout our citizenry a new understanding that every child that we serve in LSSU is our collective responsibility.

Board Ratification of Final Report and Previous Studies:

On November 15, 2017, each of the district school boards of Elmore-Morristown and Stowe, as well as the LSSU board, ratified in public session the following resolution:

“Based upon the nine years of work through four studies of governance options for the member districts of LSSU and including exploration of options for structures with other districts in Vermont, the boards of the Elmore-Morristown and Stowe School Districts, in conjunction with the Lamoille South Supervisory Union Board:

- ***Embrace and approve the findings of all previous governance studies, spanning from 2009 to present;***
- ***Conclude that the districts of EMUU and SSD with the support of LSSU currently exceed the goals of Act 46 individually and collectively;***
- ***Find that continuing in the current supervisory union structure as an Alternative Governance Structure is the best means for ensuring the districts continue to meet the educational and operational goals of Act 46 with regard to:***
 - ***Providing equitable and high-quality learning opportunities for all students;***
 - ***Ensuring strong student outcomes;***
 - ***Promoting innovation and continuous improvement;***
 - ***Achieving efficient and effective operations at a cost that taxpayers value;***
 - ***Reflecting and respecting community values and meaningful community engagement; and***
 - ***Conducting all supervisory union and district affairs in a transparent manner.”***

LAMOILLE SOUTH SUPERVISORY UNION PROPOSAL FOR AN ALTERNATIVE GOVERNANCE STRUCTURE

Fast Facts

	Elmore-Morristown	Stowe	LSSU
Schools Operated	1. Elmore (grades 1-3 with up to 20 students) 2. MES (grades K-4) 3. PAML (grades 5-8) 4. PA (grades 9-12)	1. SES (grades K-5) 2. SMS (grades 6-8) 3. SHS (grades 9-12)	1. Public and partnership preschool programs
Enrollment ¹	PreK 83 Elmore 19 MES 276 PAML 287 PA 247 K-12 Total 829 PreK-12 Total 912	PreK 56 SES 346 SMS 177 SHS 236 K-12 Total 759 PreK-12 Total 815	K-12 Total 1588 PreK-12 Total 1727
Resident Student ADM ²	127.7 + 771.15 = 898.85	761	
Total Budget (FY17)	\$15,966,750	\$12,363,600	
ES/EP (FY17)	\$14,073	\$14,566	
Student:Teacher Ratio ³ (VT Average 10.03)	11.41	11.82	11.43
Student:Staff Ratio ⁴			5.13
Board Configuration	7 members, including 2 residents from each town	5 members	7 members: 3 Stowe and 4 EMUU
Community Population ⁵	855 + 5,227 = 6,082	4,314	

¹ Vermont Agency of Education Student Enrollment Report 2015-2016 School Year

² Vermont Agency of Education Average Daily Membership (ADM) Report for 2015-2016 (ADM-17) by Resident District

³ Vermont Agency of Education Teacher and Staff Survey Report - 2015 (note that staffing data does not include contracted service providers)

⁴ Total FTEs for LSSU divided by total k-12 enrollment.

⁵ US Census Bureau, 2010 Census

Background and Context:

Starting in 2009, the districts of Elmore, Morristown, and Stowe began voluntarily and proactively studying governance options. This ongoing study process has gone through **multiple phases** of strategic assessment, providing us opportunities to come closer together in productive collaboration:

Phase 1: *2009 Governance Study Part 1 (Appendix A)*

Phase 2: *2010 Governance Study Part 2 (Appendix B)*

Phase 3: *2011-2013 Regional Education District Study (Appendix C)*

Phase 4: *2013-2016 Elmore/Morristown Unification Study (Appendix D)*

Phase 5: *2015 Act 46 Accelerated Incentive Financial Study (Appendix E)*

Phase 6: *2016-2017 EMUU/Stowe Alternative Structures Self-Study*

Throughout the last nine years, we've worked hard to increase our cooperation and thereby our efficiencies. Each phase of this process has convinced us that working together as two separate, strategically coordinated school districts within the context of a supervisory union bound by a common mission (Appendix J) and committed to providing a quality education for all our children is the most effective means for our communities to improve the educational opportunities afforded our students and meet the goals of Act 46.

Working together, the EMUU and Stowe school districts have already established patterns of productive mutual governance that:

- foster a robust dialogue between our districts, schools, and educational professionals, focused on the needs and aspirations of our students grounded in evidence-based assessments of student and school performance and best practice;
- lead to clearly articulated goals and action plans to address the particular and shared needs of our students and schools;
- enable us to use one district to pilot and work out policies and initiatives that we then can scale to the whole supervisory union;
- maintain close and productive lines of operational transparency and communication with community members whose support is crucial to our individual and collective success; and
- provide additional opportunities for our students aimed at addressing shared challenges and emerging needs by accessing the programs and collective resources of both districts.

In the letter and spirit of Act 46, throughout these past nine years LSSU has demonstrated an ongoing and unwavering commitment to providing students across three towns and two school districts a high-quality education at a cost that parents, voters, and taxpayers value as evidenced by:

- the educational and operational initiatives our supervisory union has already taken in response to each of the six studies that we have undertaken;
- the high levels of community engagement throughout this process, including the successful merger vote between the communities of Elmore and Morristown; and
- the unwavering financial support of our citizenry for their schools by consistently passing district budget appropriations.

Systemic Growth and Operational Changes from Studies:

Our study processes have led to increased efficiencies and a higher quality education for our students. Examples of improvements, beyond those practices already in place from curriculum to supervisory union-wide action planning include:

Operations:

- Developing a single master agreement with competitive salaries for teachers throughout LSSU, centered on a shared commitment to attract and retain top quality, professional educators with values aligned to LSSU's student-centered mission.
- Restructuring the use of school and administrative space (saving \$150,000).
- Restructuring core services to a supervisory-union-wide model to enhance quality and cost effectiveness for multiple programs:
 - Food service administration
 - Health services
 - All of special education, including paraeducators
 - Transportation
 - Technology administration
 - Human Resources coordination
 - PreK administration and programming
 - English Language Learner supports
 - Wellness curriculum and program coordination
- Common Learning Management System (LMS) and Student Information System (SIS).
- Cooperative contract for high speed internet access through fiber.
- Cooperative contract for facilities audits.
- Managed education spending per equalized pupils (and homestead tax rates), staffing ratios, including making significant staffing reductions in Morristown, and ultimately the formation of the Elmore-Morristown Unified Union.

Educational Opportunities:

- Full day kindergarten for all students.
- Public PreK partnerships for 3-4 year olds, early adopter of universal pre-Kindergarten.
- Common supervision and evaluation system and new teacher mentoring program with peer feedback across systems.
- Increased access to technology for students in underserved schools.
- Expanded Advanced Placement and Dual Enrollment courses.
- Cooperative teams for girl's hockey, baseball, softball, and member-to-member partnerships.

Professional Development:

- Common needs-based professional development, such as Curriculum Camp, Inservice Days, and annual required trainings, such as CPI.
- Teacher leadership across the supervisory union through the Curriculum Instruction and Assessment Council and Content Steering Committees.

Moving ahead, we remain committed to using the findings and recommendations at the heart of our recently completed Act 46 self-study to build on this work and implement additional educational and operational changes that will better serve the students in our care and address the goals of quality, equity, and operational efficiency.

Summary Analysis and Findings: Phases 1-5:

Phase 1: 2009 Governance Study Part 1 (See Appendix A)

Our initial study came out of a desire to explore all options that might improve taxpayer value and educational outcomes. Our member districts agreed to contract with Raymond Proulx, Ed.D., for analysis of demographic and economic factors that could inform local deliberations on governance. Generally, the data indicated that LSSU and its member districts of Elmore, Morristown, and Stowe were efficient and well managed. However, economic and demographic trends indicated that maintaining quality and efficiency could become challenging. Key findings from the 2009 study include:

- Over a 10-year period, enrollment declined. Thus, the districts needed to attend to likely increased ES/EP and homestead tax rates, especially in Elmore. In addition, we were concerned with sustaining the critical mass of students needed to provide effective curriculum and programs within and across all grade levels.
- Operating structures for delivering education within member districts included the Elmore School, the only structure of its kind in Vermont, and Morristown and Stowe's PreK-12 operating structures, both of which are average in size based on numbers of pupils as compared to similar Vermont systems, the average size at that time being 880 pupils.
- Our districts all had lower than average per-pupil expenditures when compared with schools with similar enrollment and structure.
- Budget analysis for Elmore, Morristown, and Stowe School Districts suggested that three primary variables were driving costs: student-to-teacher and student-to-total-staff ratios, staff salaries and benefits, and special education.
- Comparison of district master teacher contracts revealed major differences at that time that would present significant challenges to any attempts to transform school governance structures.
- Comparative data for LSSU and seven other supervisory unions with student populations between 1,400 and 1,700 demonstrated our proven track record of consolidating services to maximize efficiencies. Evidence of these efforts included: common school board policies, centralized fiscal services, coordinated curriculum and education programs, planned technology, data collection and analysis, human resources services, student assessment instruments and procedures, consolidated grants, and special education.
- Comparative financial data revealed that efforts to consolidate services were accomplished to a high degree of efficiency. For example:
 - LSSU had the highest ratio of students to central office personnel staff;
 - mid-range cost per general administration; and
 - next to the lowest current cost per pupil for all services.

A financial analysis of the cost per pupil for each of the following scenarios was developed:

- ❖ Status quo - retain existing governance structures
- ❖ Elmore and Morristown Elementary form a K-5 Union
- ❖ Elmore tuition all students to Morristown Schools
- ❖ Union Middle School of Stowe and Morristown
- ❖ Union High School of Stowe and Morristown
- ❖ K-12 Unified Union School District

We also reviewed the scenarios of joint contract school districts and expanded sharing of central office services, including with other partners outside of LSSU.

Both financial and data analyses indicated that changes in operational and governance structures likely would generate a mix of positive and negative results for member districts. However, looking solely through the lens of the data analyses, the future impacts of enrollment changes and expenditure trajectories was compelling enough to warrant a second phase of the study. A second phase of informal study was then undertaken.

Phase 2: 2010 Governance Study Part 2 (See Appendix B)

The Optional Educational Structures Committee (OESC) was formed and charged with the task of investigating whether the three school districts within the LSSU should “alter structures, ways and means for delivering education to all pupils within the union, and if so, what alternatives does the committee recommend to the LSSU board for further consideration.”

The OESC was comprised of 13 community members representing the various stakeholder groups in the member districts. Their work was facilitated by Raymond Proulx, Ed.D. The reason for initiating this process was a shared concern about maintaining excellence in our K-12 education system at an affordable cost to the community.

Ultimately, the committee made the following recommendation:

“In order to advance the communities’ values and educational quality, we recommend exploration of a Regional Education District. We recommend that two scenarios for a RED be explored:

1. *Merging into one consolidated Middle School and one consolidated High School for the three towns, and*
2. *Maintaining a Middle and High School in Morristown and a Middle and High school in Stowe.”*

Phase 3: 2011-2013 LSSU Regional Education District (RED) Study (See Appendix C)

Per the OESC’s recommendation, a formal 706b process was undertaken. As an outcome of that study, the committee concluded that there were two primary options: continuing in the current structure, or forming a Regional Education District (RED) and restructuring the middle and high schools. Among the obstacles to restructuring our middle and high schools was:

- No evidence that the wholesale re-organization of two high-performing K-12 districts would lead to greater educational opportunity or improved student performance.
- The very real impact on a significant portion of our student body of longer bus rides, given the geographic size of our SU. The RED study was particularly concerned about ensuring access by all students to fully participate in after-school activities without compromising their ability to complete their homework due to late home arrivals.
- The perceived loss of community identification with and support for their schools.

Note: Other models of governance consolidation, identified and studied in 2009 and 2011, were found not to leverage any advantages for the districts of LSSU.

“Given the history of success of the current systems, the history of strong community support for the current systems, and the uncertain future context of public education in Vermont, the LSSU RED committee has determined it is not advisable to form a Regional Education District at this time.”

Based upon these findings, study of merged governance structures between and among all three districts of LSSU ended in 2014. However, additional work continued to pursue efficiencies and governance changes where change made sense.

Phase 4: 2013-2016 Elmore-Morristown Unified Union Study (EMUU)

The financial concerns projected in 2009 for Elmore became a reality. In 2013 and 2014, the community of Elmore clearly communicated that a change in tax rates was a priority. The Elmore board sought to engage the community through multiple meetings and a survey regarding the preferred strategy for further study.

In 2014, after continued informal conversations and a non-binding vote of the electorate of both Elmore and Morristown on Town Meeting Day, the boards undertook a formal 706b study process with a focus on the formation of a Unified Union between Elmore and Morristown School Districts.

After a laborious process that involved tremendous work to win the buy-in of both communities, the boards of the Elmore and Morristown school districts were able to develop a plan for the formation of a unified union. When the voters of both Elmore and Morristown approved the union of the two school districts, we were able to begin our work as one school district. The Vermont State Board of Education then designated the newly formed Elmore-Morristown Unified Union (EMUU) to LSSU.

Consistent with study projections, the formation of the Unified Union resulted in a reduction of Education Spending in the combined districts of \$470,000. This had virtually no impact on local homestead tax rates in Morristown but generated a significant tax rate reduction of 31.5 cents (-\$0.315) for Elmore. These savings were achieved purely based on efficiencies, with no Act 46 incentives.

This unification formalized existing partnerships, thus ensuring collaboration and stability of enrollment for the new district. With stable enrollment, we have safeguarded the critical mass of students necessary for robust programmatic opportunities and enhanced professional collaboration and quality learning.

Phase 5: 2015 Act 46 Accelerated Incentive Financial Analyses (See Appendix D)

During the EMUU study process, Act 46 passed. The EMUU study briefly paused while all three member districts reviewed the possible financial implications of the accelerated incentives. The analysis, which projected homestead tax rates out six years beyond the formation of a new structure (to best assess the impacts after incentives phased out), indicated that both Stowe and Morristown were likely to see homestead tax rate impacts that were greater in a RED than if districts remained independent. Elmore saw tax rate advantages for any change in structure contemplated.

Taking into account both these financial implications and what we had learned from the three phases of study, all three districts concluded that the accelerated merger process was not in their best interests, and the EMUU study resumed. The Elmore and Morristown boards asked the Stowe School District board to wait to study further Act 46 considerations until after the EMUU process was complete and the first budget was approved.

Beginning in 2016, the newly formed Elmore-Morristown Unified Union District and the Stowe Educational District began the final phase of our deliberations by undertaking a joint self-study to assess the capacity of our current governance structure to meet or exceed the goals of Act 46.

**LAMOILLE SOUTH SUPERVISORY UNION
PROPOSAL FOR AN ALTERNATIVE GOVERNANCE STRUCTURE**

Committee Membership

Peter Clarke, Consultant

Tracy Wrend, Superintendent of Schools

Emily Bradbury, Stowe Board Member

Jim Brochhausen, Stowe and Lamoille South Board Member

Tiffany Donza, Stowe and Lamoille South Board Member

Emily Rosenbaum, Stowe Board Member

Cara Zimmerman, Stowe and Lamoille South Board Member

Ida Mae Anderson, Elmore-Morristown Board Member

Karen Cleary, Elmore-Morristown Board Member

Stephanie Craig, Elmore-Morristown and Lamoille South Board Member

Penny Jones, Elmore-Morristown and Lamoille South Board Member

Dave McAllister, Elmore-Morristown and Lamoille South Board Member

Christy Snipp, Elmore-Morristown and Lamoille South Board Member

Stuart Wepler, Elmore-Morristown Board Member

EMUU/STOWE ALTERNATIVE GOVERNANCE STRUCTURE SELF-EVALUATION

Quality, Equity, and Ability to Achieve or Exceed Education Quality Standards

INTRODUCTION

Our joint-district self-study made the educational goals of Act 46 the central focus of our work, findings, and recommendations.

At the heart of the law are five key goals:

- *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.*

To initiate our Act 46 self-study, we began by reviewing the State's Education Quality Standards (EQS) and assessing the effectiveness of our instructional programs against those quality standards. We undertook that work in two ways over the past year:

- a. the LSSU Board, along with district board members, undertook a comprehensive review of the EQS; and
- b. LSSU participated in the first round of the EQS Independent Field Review.

These EQS reviews were then followed by a full SU-wide Act 46 study in order to:

- ✓ evaluate our districts' current capacity to meet or exceed the goals of Act 46;
- ✓ consult with other districts in our region to discuss ways to promote improvement; and
- ✓ submit a proposal for an alternative governance structure including detailed actions the existing governance structure (LSSU) intends to take to meet/exceed the goals of Act 46 moving forward.

The Self-Study that follows is the culmination of nine years of continuous reflection by our communities on the best way to deliver a quality education to the students we serve. We believe the findings and action items represented herein provide not only additional evidence of our supervisory union's collective capacity and commitment to work effectively together, but demonstrate a clear basis for the State Board to conclude that maintaining LSSU in its current form as an alternative structure is the best means of improving the educational opportunities for the students in our region and meeting the goals of Act 46.

SELF-STUDY – ANALYSIS, FINDINGS, AND RECOMMENDATIONS

Section 1: Baseline/Demographic Data

Operating/Tuitioning Structures

The **Elmore-Morristown Unified Union (EMUU) School District** operates four schools; The Elmore School, Morristown Elementary School, Peoples Academy Middle Level, and Peoples Academy. The **Stowe School District (SSD)** operates three schools; Stowe Elementary School, Stowe Middle School, and Stowe High School.

EMMU and SSD are served by **Lamoille South Supervisory Union (LSSU)**, which provides leadership and board support, administrative services, information technology services, Special Education, transportation, Early Education and Pre-Kindergarten education, and shared educational services, including: School Psychologists, ELL Teacher, Speech Language Pathologists, Occupational Therapists, Physical Therapist, and the School Nurse Supervisor.



The Elmore School

1 classroom
Multi-age, Grades 1-3



Morristown Elementary School

Grades K-4



Peoples Academy Middle Level

Grades 5-8



Peoples Academy

Grades 9-12
Tech Center: Green Mountain Technical and Career Center



Stowe Elementary School

Grades K-5



Stowe Middle School

Grades 6-8



Stowe High School

Grades 9-12
Tech Center: Green Mountain Technical and Career Center



LSSU School-based
Pre-Kindergarten

6 school-based
classrooms;
2 sections in Stowe and 4
in Morristown



Community
Pre-Kindergarten
Partner Programs

9 Community Partner
Programs

Prior to the formation of the Elmore-Morristown Unified Union, the Elmore School District offered publicly funded school choice for grades 7-12. Historically, 8 of 10 Elmore resident students attended schools in Morristown. All publicly funded tuition will be phased out of EMUU as of FY20.

Year	Elmore Grades 7-12 Students	Morristown Number of Students	Morristown % Grade 7-12	Stowe Number of Students	Stowe % Grade 7-12	Other Number of Students	Other % Grade 7-12
2004-2005	87	74	85.06%	8	9.20%	5	5.75%
2005-2006	86	70	81.40%	8	9.30%	8	9.30%
2006-2007	79	65	82.28%	9	11.39%	5	6.33%
2007-2008	77	63	81.82%	8	10.39%	6	7.79%
2008-2009	66	54	81.82%	5	7.58%	7	10.61%
2009-2010	57	48	84.21%	3	5.26%	6	10.53%
2010-2011	54	46	85.19%	2	3.70%	6	11.11%
2011-2012	50	42	84.00%	2	4.00%	6	12.00%
2012-2013	48	42	87.50%	2	4.17%	4	8.33%
2013-2014	56	49	87.50%	6	10.71%	1	1.79%
2014-2015	64	52	81.25%	9	14.06%	3	4.69%
2015-2016	66	54	81.82%	8	12.12%	4	6.06%
2016-2017*	64			9*	14.07%*	5*	7.82%*
2017-2018**	61			6**	9.84%**	2**	3.28%**

Data is as of November of the each year as calculated for budget development. Actual counts may vary depending upon data source. However, the consistent snapshot of data within a fixed annual window provides a reliable picture of trends.

*Grandfathered students only- EMUU became a PreK-12 operating district

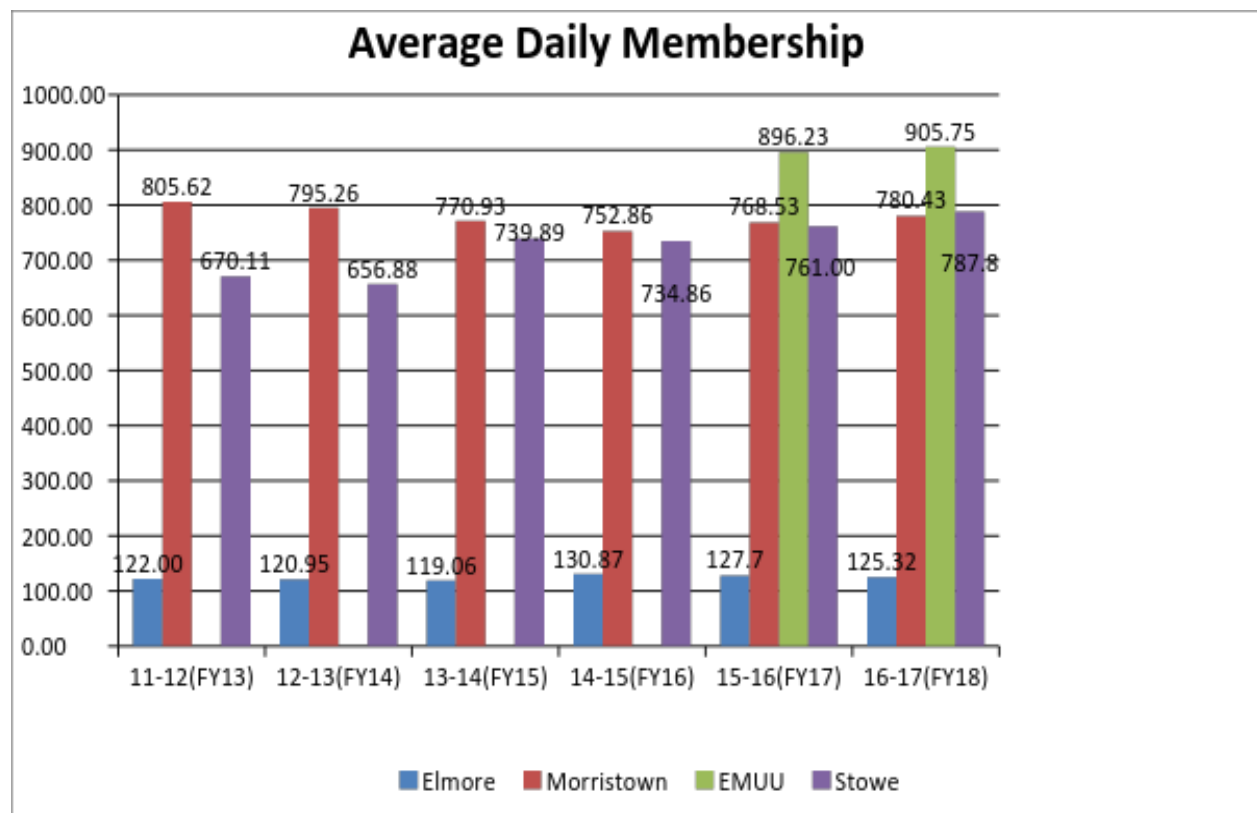
**Projected for FY 18, grandfathered students only

Public High School Choice

Both Peoples Academy (PA) and Stowe High School (SHS) are long standing members of the Winooski Valley Public High School Choice Collaborative, which administers the public school choice lottery process for our region and coordinates with high schools in other regions. For 2017-2018, PA will accept 7 students and allow 24 to exit. PA has had from 6 to 9 students exiting in any given year from 2011-2012 to 2015-2016, and from 0 to 7 incoming slots have been utilized in the past 5 years. Exiting students generally attend Lamoille Union High School or Stowe High School.

For 2017-2018, SHS will accept 6 students and SHS allows 21 to exit. SHS has had no students exiting in any given year from 2011-2012 to 2015-2016, and all 6 incoming slots have been full in the past 5 years. Incoming students are generally from PA and Harwood Union High School.

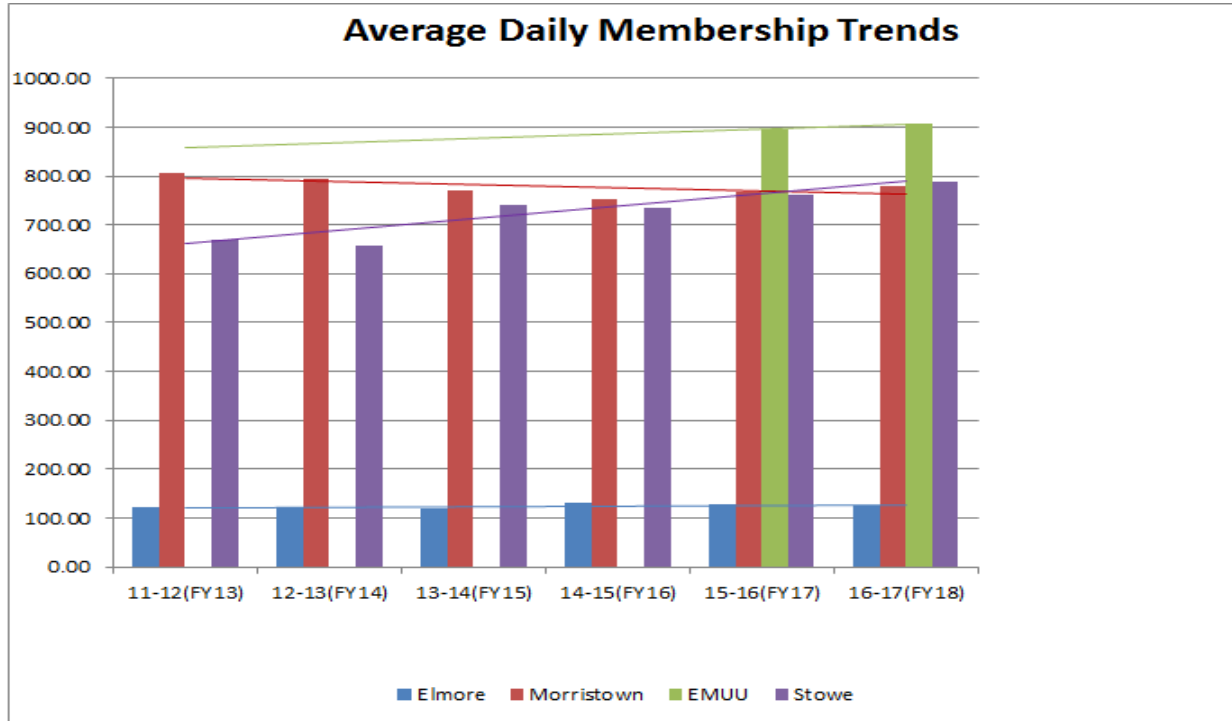
Average Daily Membership (ADM)



ADM in Stowe over the last six years has ranged from 656.88 to 787.8, with the peak ADM in the current year and 20% higher than the lowest ADM in the same time period. Elmore and Morristown's ADMs are reported individually through FY18 for the purpose of reviewing former district trends; however, beginning with FY17, ADM is appropriately attributed to EMUU and is also reported for that entity. ADM in Morristown alone was at its lowest in a six year window in FY16, at 752.86 and at its highest in FY13, at 805.62. Elmore's ADM ranged from 119.06 to 130.87. EMUU's ADM has been 896.23 and 905.75 in its two years of existence respectively.

Average Daily Membership (ADM) Trends

A trend line illustrates the trajectories of change for each of the Districts of Elmore, Morristown, Stowe, and EMUU. Stowe's ADM is clearly on an upward trajectory. Morristown's ADM overall was declining, while Elmore's was marked by a slight uptick. Together as EMUU, the ADM is showing an initial increase.



Enrollment

Similar to ADM, enrollment has been increasing in Stowe. From 2012-2013 to 2015-2016 (the last year published on the AOE website), K-12 enrollment has increased from 696 to 759 or 9.05%. The inclusion of pre-Kindergarten students in enrollment shows a steeper enrollment increase of 15.6% in the same time period. Elmore-Morristown's enrollment has declined just over 3% (-3%), counted with or without pre-Kindergarten. (Elmore and Morristown offered pre-kindergarten in community partner settings beginning in 2011-2012.) Elmore and Morristown schools enrolled 829 students K-12 in 2015-2016, as compared to 856 in 2012-2013.

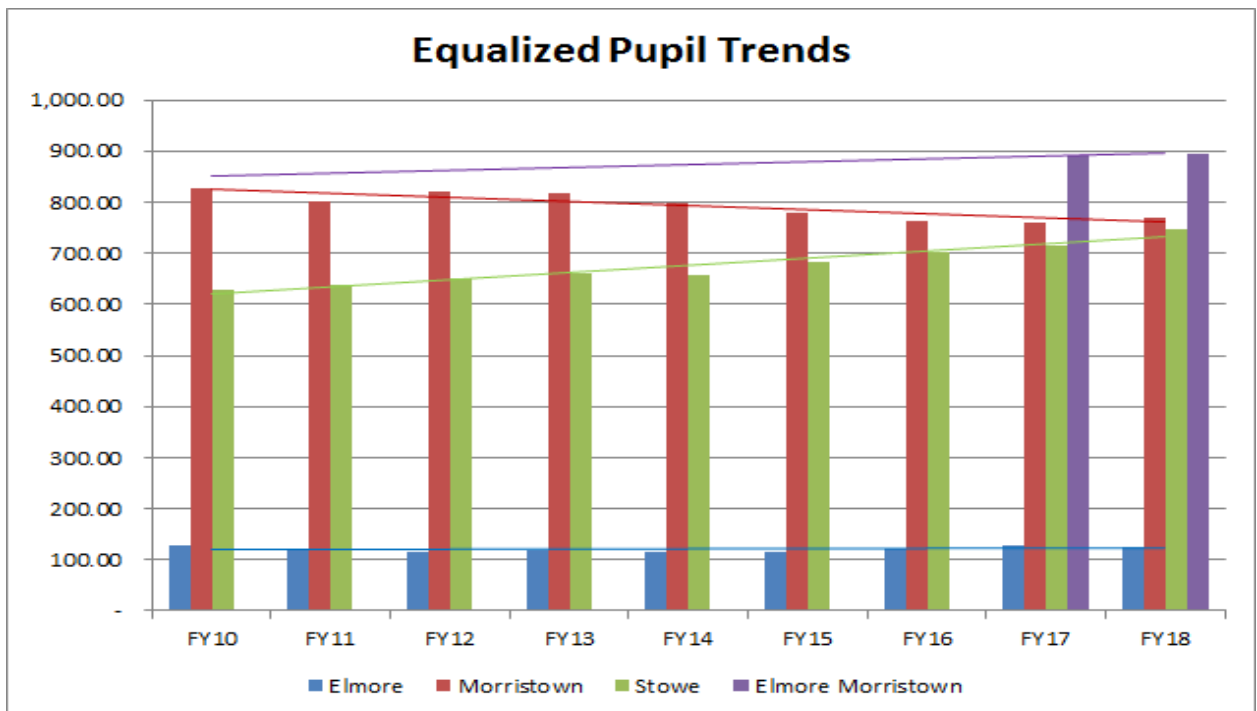
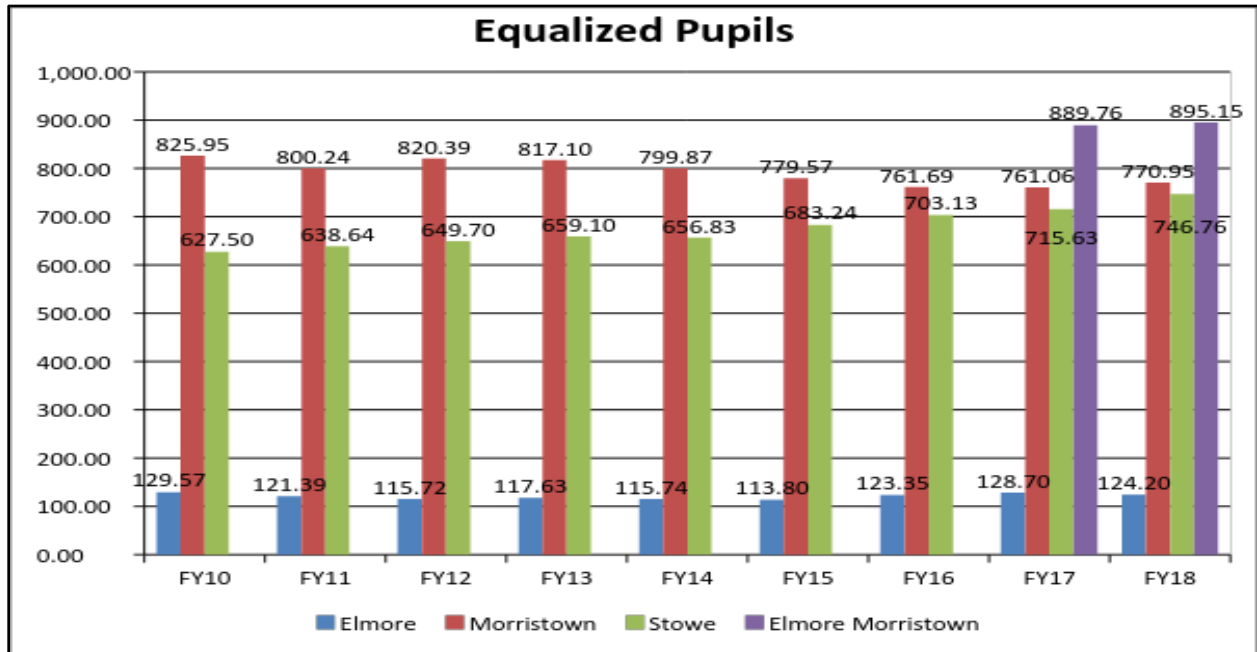
		PK	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	AW	PK-12	K-12	
2016-2017*	Lake Elmore School			3	7	7											17		
	Morristown Elementary	100	53	57	57	54	57										378		
	Peoples Academy Middle							52	83	51	73						259		
	Peoples Academy											79	70	69	51		269	923	823
	Stowe Elementary School	70	41	61	55	59	60	52										398	
Stowe Middle/High School									67	59	63	75	61	63	60		448	846	776
2015-2016	Lake Elmore School			8	6	5											19		
	Morristown Elementary	83	66	57	53	50	50										359		
	Peoples Academy Middle							85	53	74	75						247		
	Peoples Academy											73	65	60	49		287	912	829
	Stowe Elementary School	56	61	49	60	63	46	67										402	
Stowe Middle/High School									52	59	66	63	62	61	50		413	815	759
2014-2015	Lake Elmore School			6	5	9											20		
	Morristown Elementary	86	60	56	47	43	86										378		
	Peoples Academy Middle							48	61	76	74						242		
	Peoples Academy											67	59	58	56	2	259	899	813
	Stowe Elementary School	66	48	54	62	41	64	51										386	
Stowe Middle/High School									60	63	57	61	58	49	57	1	406	792	726
2013-2014	Lake Elmore School			5	9	6											20		
	Morristown Elementary	88	65	50	43	72	48										366		
	Peoples Academy Middle							63	69	79	70						249		
	Peoples Academy											61	69	62	56	1	281	916	828
	Stowe Elementary School	62	53	60	42	62	50	57										386	
Stowe Middle/High School									59	57	58	64	54	60	55	1	408	794	732
2012-2013	Lake Elmore School			9	5	4											18		
	Morristown Elementary	89	53	45	76	42	66										371		
	Peoples Academy Middle							73	79	69	61						274		
	Peoples Academy											73	76	58	64	3	282	945	856
	Stowe Elementary School	9	51	43	49	51	51	52										306	
Stowe Middle/High School									47	61	66	58	60	62	45		399	705	696

* AOE enrollment data for 2016-2017 was not published at the time of this review. Data is based upon opening day enrollment.

AW = adult without diploma

Equalized Pupils

Similar to enrollments and ADM, Stowe has seen a 19.01% increase in equalized pupil counts since FY10. Prior to the formation of EMUU, Elmore School District was experiencing significant variability in equalized pupil count from year to year and an overall decline. Morristown’s equalized pupil count, like enrollment and ADM, had declined by 7.78% (-7.78%) since FY10. In FY18, EMUU’s equalized pupil count is up slightly from the prior year.



Phantom Pupils

Historically, the Elmore School District counted some phantom pupils in its equalized pupil count, including from FY10 to FY13. Since FY14, phantom pupils have not been a part of the Equalized Pupil count in any district of LSSU, Elmore, Morristown, Stowe, or Elmore-Morristown.

Elmore									
	FY10	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY18
Actual calc.	129.57	121.39	115.72	117.63	115.74	113.80	123.35	N/A	N/A
Phantoms	3.47	6.99	8.17	1.92	-	-	-		
Hold-harmless calc.	133.04	128.38	123.89	119.55	115.74	113.80	123.35		

Because of relatively high rates of participation in Early College by seniors at People Academy, Morristown School District and now EMUU, does have a handful of this sort of phantom in any given year since the program’s inception. SHS also has Early College Phantom Students for the first time in its FY18 counts.

Students Eligible for Free or Reduced Lunch

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Lake Elmore School	*	*	*	*	*
Morristown Elementary School	54%	53%	51%	45%	44%
Peoples Academy	36%	41%	41%	39%	34%
Peoples Academy Middle Level	44%	45%	46%	44%	48%
Stowe Elementary School	15%	15%	17%	15%	17%
Stowe Middle/High School	20%	17%	17%	15%	13%

There is a higher percentage of students eligible for free and reduced lunch in EMUU schools than in SSD schools. EMUU receives Title 1 funding and has a 21st Century grant funded after school program. No Stowe schools are eligible for Federal Title 1 funds.

Students Eligible for Support Services

Percentage of Students with No Support Services/Plan					
	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Lake Elmore School	*	*	*	*	*
Morristown Elementary School	84%	84%	80%	81%	81%
Peoples Academy	86%	74%	69%	66%	68%
Peoples Academy Middle Level	83%	72%	74%	77%	77%
Stowe Elementary School	89%	78%	81%	77%	76%
Stowe Middle/High School	77%	76%	76%	76%	80%
Vermont	74%	75%	76%	76%	73%

Percentage of Students with IEPs					
	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Lake Elmore School	*	*	*	*	*
Morristown Elementary School	*	*	16%	16%	*
Peoples Academy	7%	10%	12%	13%	16%
Peoples Academy Middle School	12%	15%	15%	15%	18%
Stowe Elementary School	6%	9%	*	6%	9%
Stowe Middle/High School	9%	9%	9%	8%	8%
Vermont	13%	13%	13%	13%	15%

There is generally a very low number of students eligible for English Language Learner Services, generally less than 20, within LSSU. LSSU employs one ELL teacher who works with students in all schools in all districts as needed.

Key Findings – Demographic Data

1. Enrollment has been increasing in Stowe. From 2012-2013 to 2015-2016 (the last year published on the AOE website), K-12 enrollment has increased from 696 to 759 or 9.05%. The inclusion of pre-Kindergarten students in enrollment shows a steeper enrollment increase of 15.6% in the same time period.
2. Elmore-Morristown's enrollment has declined just over 3% (-3%), counted with or without pre-Kindergarten. (Elmore and Morristown offered pre-kindergarten in community partner settings beginning in 2011-2012.) Elmore and Morristown schools enrolled 829 students K-12 in 2015-2016, as compared to 856 in 2012-2013.
3. ADM in Stowe over the last six years has ranged from 656.88 to 787.8, with the peak ADM in the current year, 20% higher than the lowest ADM in the same time period.
4. EMUU's ADM has been 896.23 and 905.75 in its two years of existence respectively.
5. Stowe has seen a 19.01% increase in equalized pupil counts since FY10.
6. Prior to the formation of EMUU, Elmore School District was experiencing significant variability in equalized pupil count from year to year and overall a decline. Morristown's equalized pupil count, like enrollment and ADM, had declined by 7.78% (-7.78%) since FY10. In FY18, EMUU's equalized pupil count is up slightly from the prior year.
7. Historically, the Elmore School District counted some phantom pupils in its equalized pupil count, including from FY10 to FY13. Since FY14, phantom pupils have not been a part of the Equalized Pupil count in any district of LSSU: Elmore, Morristown, Stowe, or Elmore-Morristown.
8. There are a higher percentage of students eligible for free and reduced lunch in EMUU schools than in SSD schools. EMUU receives Title 1 funding and has a 21st Century grant funded after school program. No Stowe schools are eligible for Federal Title 1 funds.

Note: Economic Context

Undergirding the positive demographic trends in our region, particularly in Stowe, has been the economic growth clearly evidenced along the route 100 corridor in Lamoille county which we anticipate continuing to expand northward. The most recent study of housing needs in Lamoille county in 2014 undertaken by Bowen National Research projects that from 2015-2020:

- *Total population in Lamoille County is expected to grow 3.6%, compared to 1.1% across Vt.*
- *The number of households in Lamoille County will grow 4.3%, compared to 1.8% across Vt.*
- *The average size of households in the county is expected to remain constant.*
- *Median household income is expected to grow by 4% in Lamoille compared to 2% in Vt.*

All of this data, supports the study's fundamental perception that the schools in LSSU can expect the continuation of solid/sustainable patterns of economic and demographic growth for the foreseeable future.

Summary Conclusions and Recommendations for Action – Demographic Data

Evidence of our capacity to assess and respond to the changing economic and demographic trends in our region can be found in the successful merger of the Elmore and Morrystown school districts. This unification not only stabilized our schools, but resulted in increased opportunity for our students. Both EMUU and Stowe represent sustainable school systems comparable in size to the top third of schools in Vermont.

Looking ahead, both the size and the composition of the population of students served by the EMMU and Stowe is evolving in Lamoille South along trend lines unique to each district. These demographic trends continue to create specific profiles of educational need in each of the communities we serve that must be addressed mindfully by school boards, administrators, and teachers if we are to meet our charge to deliver an educational program of the highest quality to every student in our supervisory union. The particular profile of student need facing each of our districts requires not only the highest levels of systemic cooperation between our districts, particularly in the areas of strategic assessment, planning, and teacher development, but also the highest degree of operational flexibility so that each district can marshal the requisite resources and design its own unique blend of educational programming to meet the specific needs and aspirations of the students it serves.

To address these two strategic challenges, LSSU will:

1. Continue the newly established practice of having board members meet jointly to assess demographic trends and student performance data in order to maintain a shared understanding of the emerging needs of students and schools in our supervisory union, as well as building shared solutions; and
2. Continue work to develop multi-year capital plans and address pressing short-term needs, including lack of space in all schools across both districts.

Section 2: Program Review - Equity, Quality, and Variety of Educational Opportunity

Board EQS Review:

As a first step in our Act 46 review process, board members worked together to identify the kinds of evidence we would need to measure our schools' effectiveness against each of the State's standards of educational quality. The board members then split up into teams with representation from both school districts. Each team was asked to consider one EQS and to categorize it as 1) something that is uniquely addressed within their district or individual schools, or 2) something that is part of a supervisory union wide practice, or 3) something that the board does not have enough information to categorize. Board members reported that they had direct or indirect knowledge of roughly half of their district's addressment of the education quality standards, believed that nearly half were supervisory-union-wide practices, and determined that they did not have enough information to draw conclusions on about 10% of the standards.

The Superintendent reviewed supervisory-union-wide and district-specific practices, with an emphasis on the areas of uncertainty regarding the EQS noted by board members. Generally, implementation of EQS is facilitated at the supervisory union level through the Curriculum, Instruction and Assessment Council or the administrative leadership team, which includes all principals from all schools in all districts, and central office administration. Expectations are consistent for all schools; however, implementation including the delivery, roles, and responsibilities for implementation vary by district and/or school.

Education Quality Standards Independent Field Review - Fall, 2015

LSSU volunteered for the first round of the Agency of Education's Education Quality Standards Independent Field Review (EQS IFR) process in October of 2015.

Commendations from the EQS IFR Report note supervisory union-wide strengths in:

- Student access to technology for learning;
- High expectations for high school students;
- Developing experience with PLPs led by two schools with the ability to expand into others;
- Positive staff-student relationships;
- Supervisory-union-wide professional development;
- Supervisory-union-wide shared decision-making with teachers;
- Deployment of increased resources where student need is greater.

Areas of recommendation included:

- Increased opportunities for enrichment during the school day;
- Expand the use of PBIS (Positive Behavior Interventions and Supports) and/or practices that support clear, consistent behavioral expectations across learning environments;
- Expand MTSS (Multi-tiered System of Supports) practices to ensure a coherent, system-wide approach to supporting students with emotional and behavioral challenges;
- Ensure that sharing of staff is based on student need rather than other factors (i.e. travel)
- Provide a written framework for administrator evaluation.

EQS Review - Summary Findings

The LSSU board, concurrent with the EMUU and SSD boards, reviewed the EQS IFR Report and compared the information in the report with the EQS. Board members concluded that LSSU is actively addressing the EQS and noted the central strategic role of the continuous improvement process already underway at the SU level. Since its inception in 2007, this work has ensured continued systemic growth in all districts and schools for all students. Importantly, these strategic goals allow for innovative differentiation regarding how EQS are addressed across our districts, often based upon student need.

As a result of LSSU's EQS review, the boards identified several priority items that we have already begun to address, including:

- EMUU's Capital Projects Committee to address issues identified in our facilities audit;
- Spanish K-12 in Elmore-Morristown;
- Literacy coach, literacy interventionist and math interventionist in Stowe;
- Our investment in new accounting software provides additional tools to ensure cost efficiencies and transparency.

Additional areas for continuous improvement across the supervisory union also included recommendations to:

- Revisit graduation proficiencies and approve a common set at the SU level;
- Adopt graduation policies by district requiring approved proficiencies. This may include differences specific to each district beyond common proficiencies;
- Continue work to scale up a tiered system of supports for both academic and social emotional learning in all schools (ex: expand teacher leader model in Stowe schools, revisit social emotional learning supports in both elementary schools). Study and address the use of paraeducators and behavior interventionists to support the needs of individual students;
- Articulate the principal evaluation process and professional improvement supports in writing;
- Continue work on Personal Learning Plans and proficiencies, articulating common expectations across school and areas for differentiation by school and by student;
- Increase monitoring of student use of flexible pathways to inform decision-making;
- Continue work to develop multi-year capital plans and address pressing short-term needs, including lack of space in all schools across both districts;
- Study options to ensure enriching learning opportunities in all schools during the school day.

These findings and recommendations for continuous action were articulated in the **LSSU Action Plan: 2015-2020** (See *Appendix I*). That action plan identified five focus areas and the steps to be taken to achieve these EQS goals:

1. Personalize learning by facilitating student engagement and empowering student voice.
2. Cultivate a safe and healthy school culture to facilitate learning for all individuals.
3. Build positive family, school, community partnerships.
4. Build a multi-tiered system of support that is responsive to the individual learner needs and holds both students and adults accountable for continuous student improvement.
5. Collaboratively develop curriculum, assessment, and instructional practices to promote a proficiency based system of learning.

As noted earlier, the **LSSU Action Plan** and the district-wide strategic planning process it reflects pre-dates Act 46 and continues to evolve, shape, and guide work of our supervisory union. In terms of the goals of Act 46, we believe this ongoing work provides direct evidence of:

1. The priority that LSSU places on a coordinated approach to strategic planning among its member districts;
2. The capacity of the EMUU and Stowe school districts to work effectively under an Alternative Structure to improve both the quality of our supervisory union's educational programs and achieve the goals of Act 46.

Act 46 - Elementary, Middle, and High School Program Review

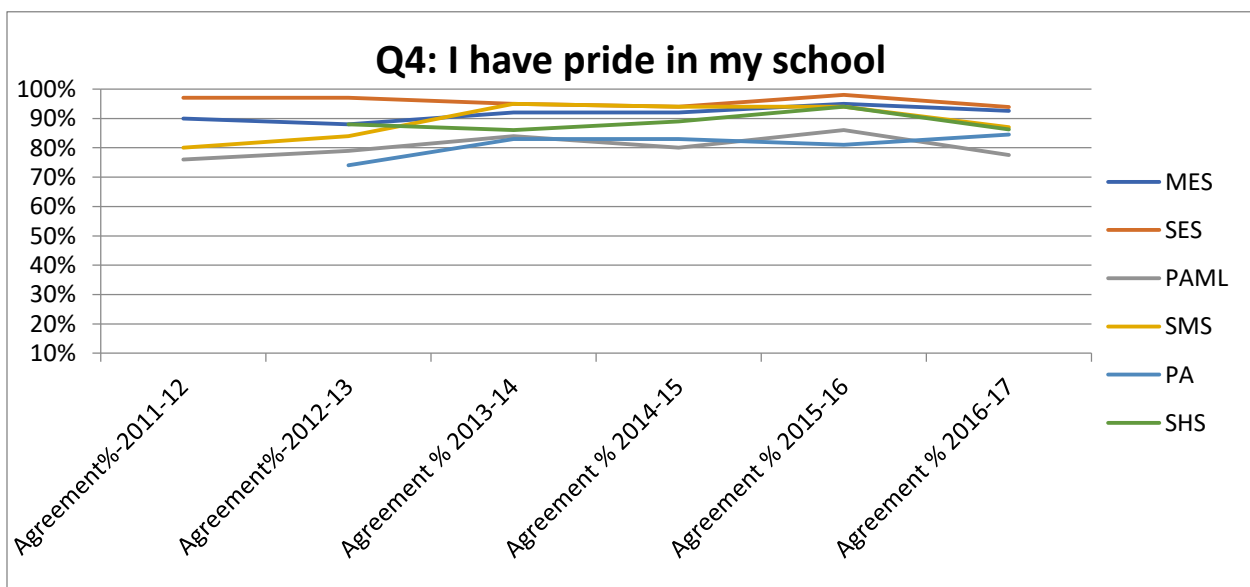
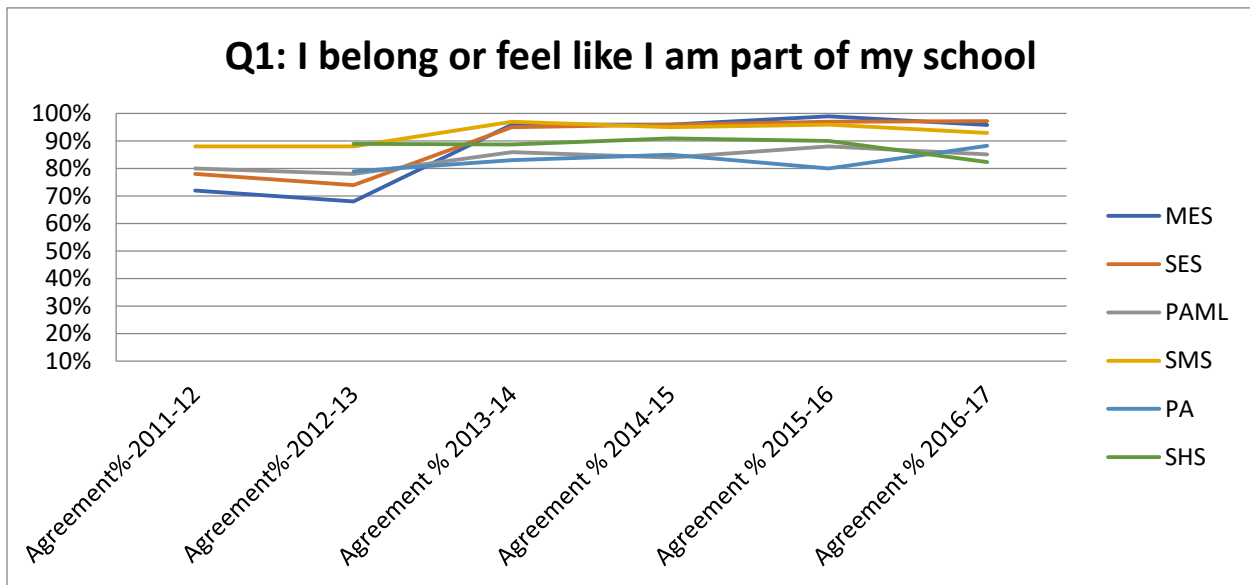
In the context of multiple studies, boards and/or committees of the boards, LSSU has undertaken a number of reviews comparing the programmatic opportunities and related student-to-staff ratios within the Elmore, Morristown, and Stowe Districts. Most recently, the boards of the Elmore-Morristown Unified Union, Stowe School District, and Lamoille South Supervisory Union compared programs for the 2015-2016 school year (just prior to the formation of EMUU) by school and in relation to similar data in 2011-2012. *A complete copy of the data reviewed, as well as notes regarding the most recent programming and staffing changes, are included in Appendix H.*

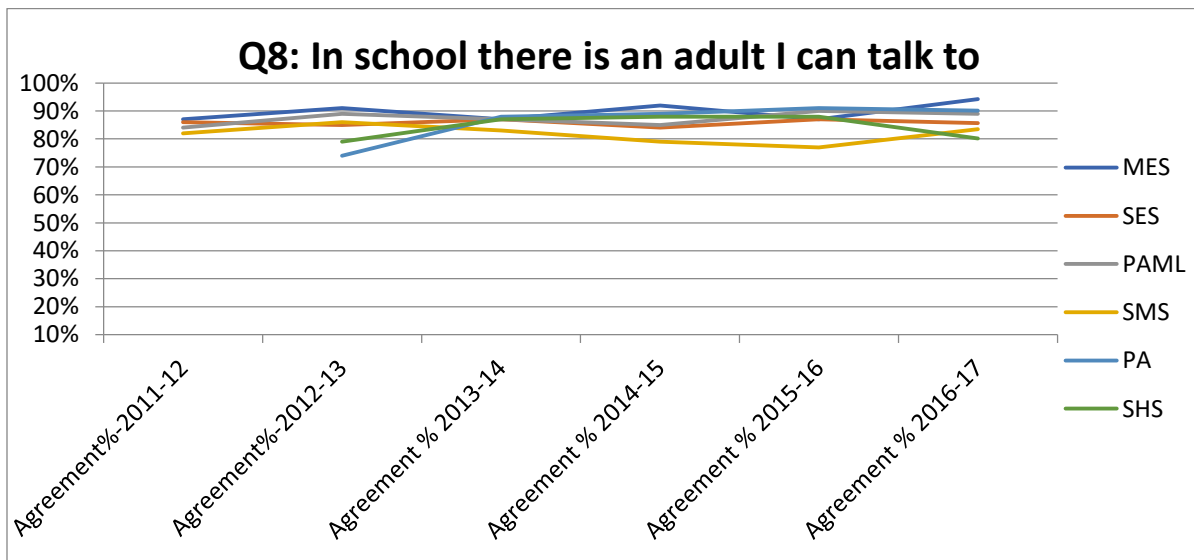
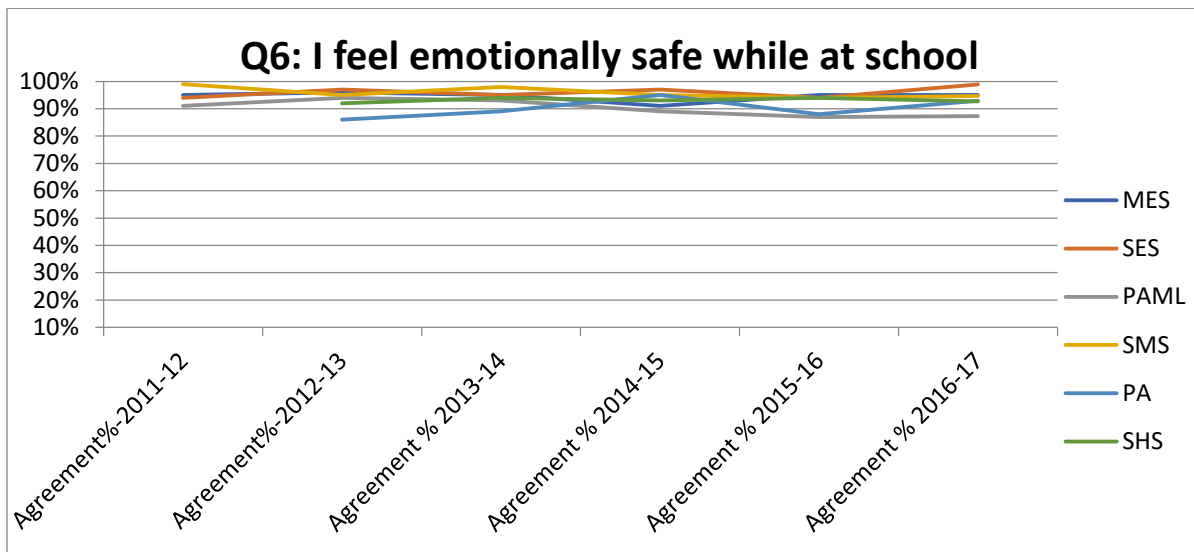
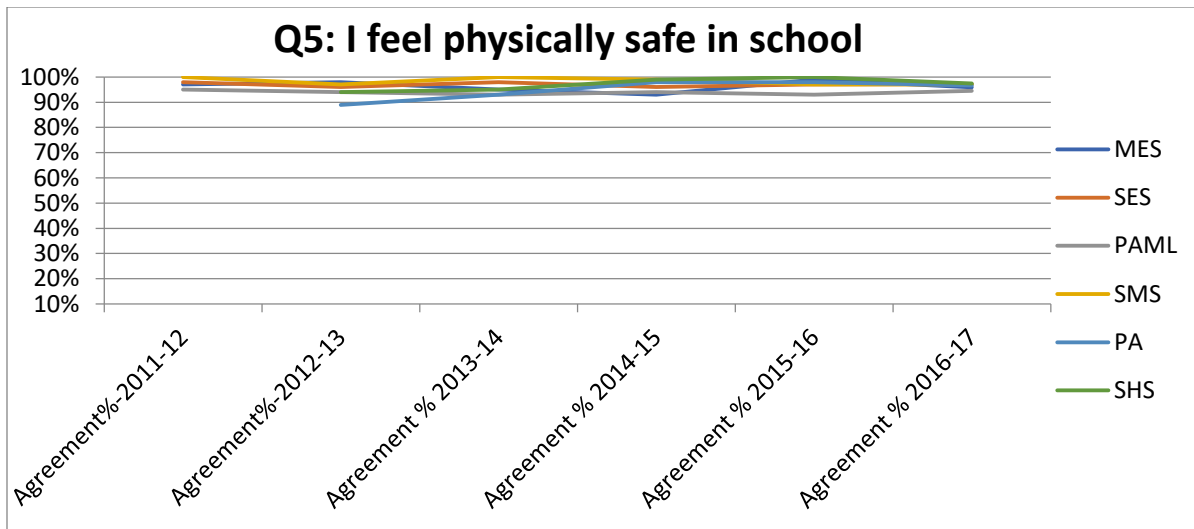
Key Findings – Program Review

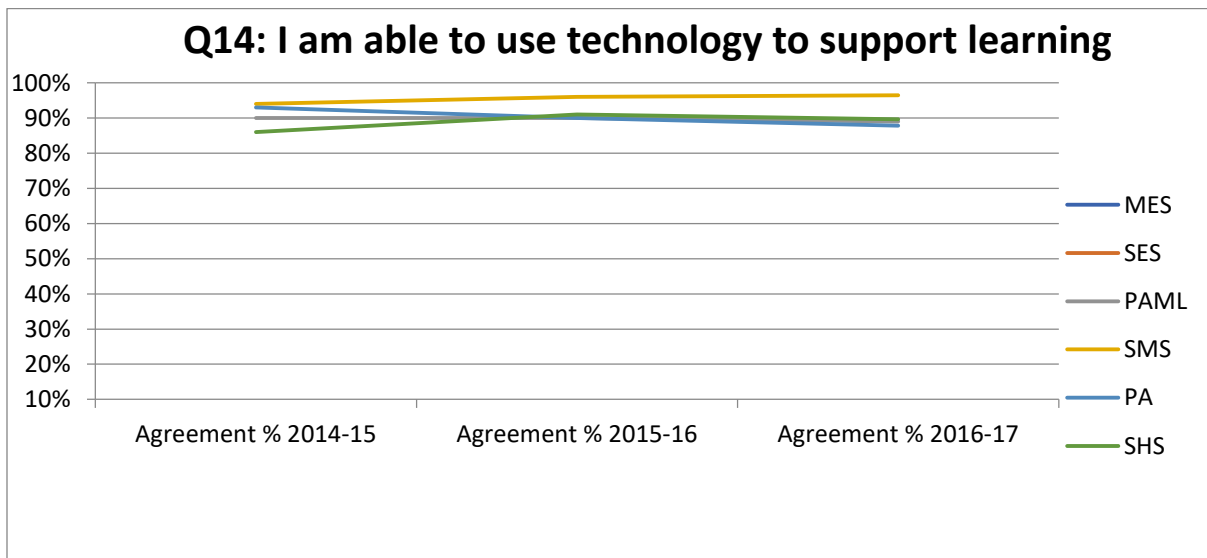
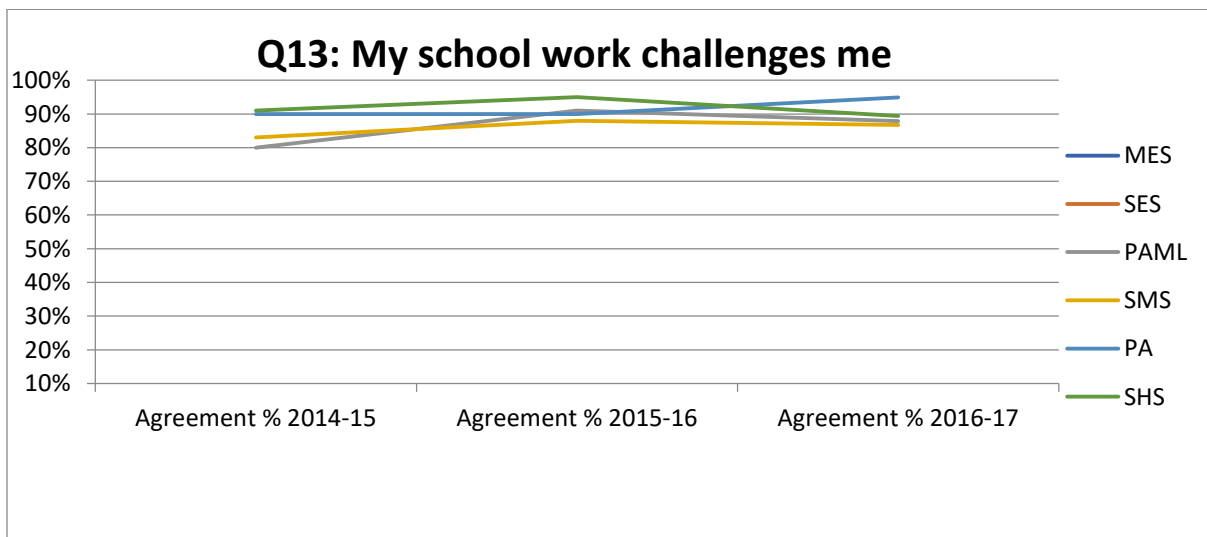
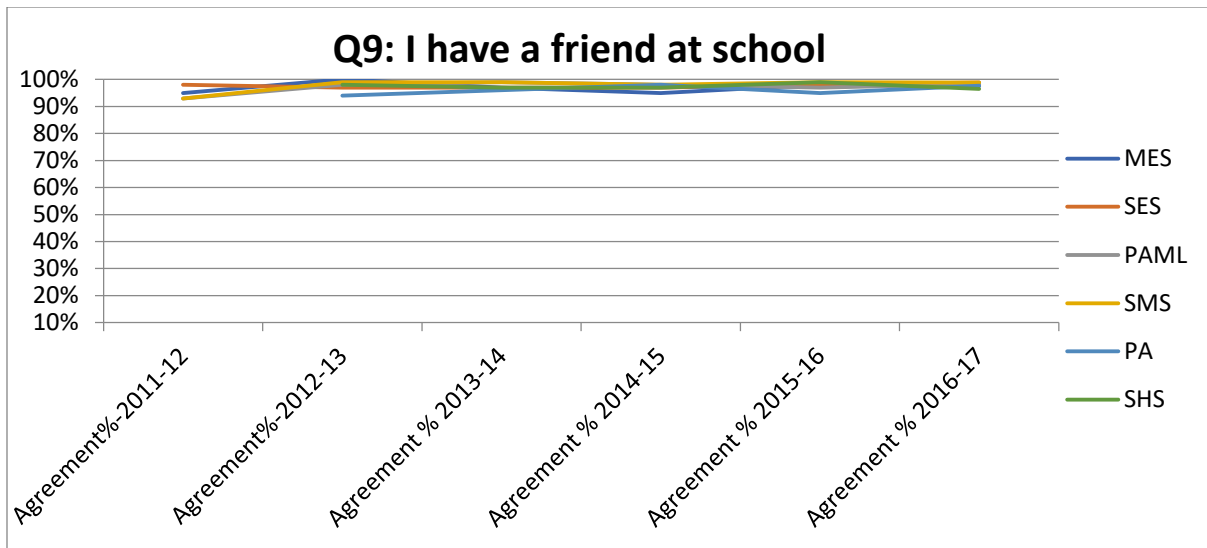
- Overall similar student-to-staff ratios in elementary, middle, and high school level core programming exist in all our schools;
- Similar elementary programming *with the exception* of foreign language - available at Stowe Elementary School but not at the Elmore and Morristown Elementary Schools. *Note: This disparity was resolved in FY18 with the expansion of foreign language in Elmore and Morristown.*
- Availability of and use of grant funds to provide supplemental instructional supports across EMUU schools;
- Similar middle level programming with the exception of foreign language, which is available at Stowe Middle School and not at Peoples Academy Middle Level; *
- Slight variation in grade level clusters served at each district's elementary and middle schools, i.e., K-4 at MES, K-5 at SES, 5-8 at PAML, and 6-8 at SML;
- More FTEs in support of music in Stowe;
- More FTEs of guidance, physical education, and in support of extended day programming at PA;
- Both districts are leaders in AP and SAT participation rates for Vermont.

Student Voice Regarding Educational Program and School Climate

Beginning in the 2012-2013 school year, all of the schools of LSSU participate annually in a common, locally developed climate survey, which is used to monitor student perceptions of some key social emotional indicators and learning supports. The survey is administered to students in grades 3-12 in October. At the elementary level, our questions have a yes, no, and most of the time response format. At the middle and high school level, our questions seek levels of agreement: agree, disagree, strongly agree, and strongly disagree, on a 4 point response scale. The questions and student responses over time are summarized on the following tables.







Key Findings – Student Voice

While there are differences in student reports regarding climate survey focus areas among our schools and from year to year, student feedback regarding the climates at all schools and overall student well-being is very positive. Still, we believe there is always room for improvement and will continue to assess and listen to our students in order to build programs and cultures that are responsive to their needs.

Summary Conclusions and Recommendations for Action – Program Review

LSSU is committed to serving all our students equitably and effectively, regardless of the district where they attend school. We have instituted ongoing assessment and planning processes to ensure continuous improvement in our educational programs that have enhanced, and continue to enhance, student learning. For example, as a result of LSSU's EQS and Act 46 Program reviews, EMUU moved to fund in its FY'18 budget new foreign language programs at its elementary and middle schools. In addition, LSSU invested in STAR software to better track student performance in all elementary schools. Finally, the entire supervisory union is working together to initiate in this academic year the use of personal learning plans in conjunction with a new proficiency based reporting system.

Looking ahead, we see opportunities through cross-district agreements to share teaching staff to accommodate SSD enrollment growth. In addition, LSSU will:

1. Continue the practice of undertaking joint, annual program reviews in order to facilitate the equitable management of staffing and programming in light of changing student enrollment and evolving student needs as part of our local and S.U. budget development processes.
2. Revisit graduation proficiencies and approve a common set at the supervisory union level.
3. Adopt graduation policies for the supervisory union requiring approved proficiencies; may include differences specific to each district beyond common proficiencies.
4. Continue work to create a flexible system of supports for both academic and social emotional learning in all schools using a research-aligned progress monitoring system, (ex: support systemic practices for MTSS with the support of Teacher Leaders/ Instructional Coaches, including PBIS in all elementary and middle schools).
5. Study and address the use of paraeducators and behavior interventionists to support the needs of individual students in conjunction with an expansion of the teacher leader model that was approved in the FY18 budget in Stowe to enable both districts to collaboratively invest in and are use new progress monitoring tools (MTSS).
6. Articulate the evaluation process for principals (common for all schools) and professional improvement supports in writing.
7. Continue working on PLPs and proficiencies, articulating common expectations across school and areas for differentiation by school and by student.
8. Increase monitoring of student use of flexible pathways to inform decision making.
9. Continue working to develop multi-year capital plans and address pressing short-term needs.
10. Study options to ensure enriching learning opportunities in all schools during the school day. ELA and math coaches are now being staffed in both districts at the middle and high school levels.
11. Continue to evaluate and improve student climate.
12. Invest in resources, including teaching staff, to address achievement gaps.

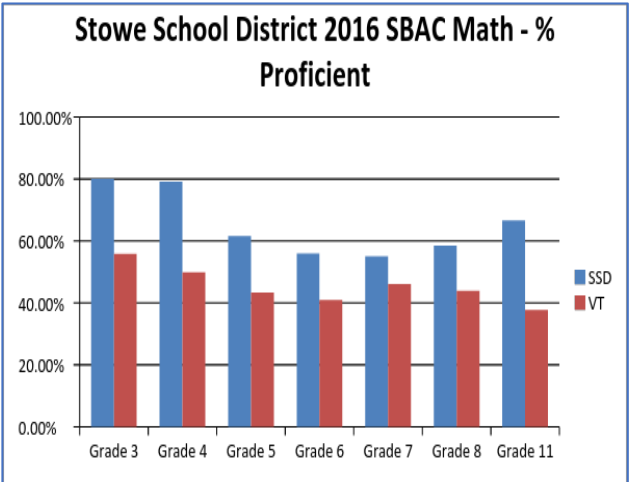
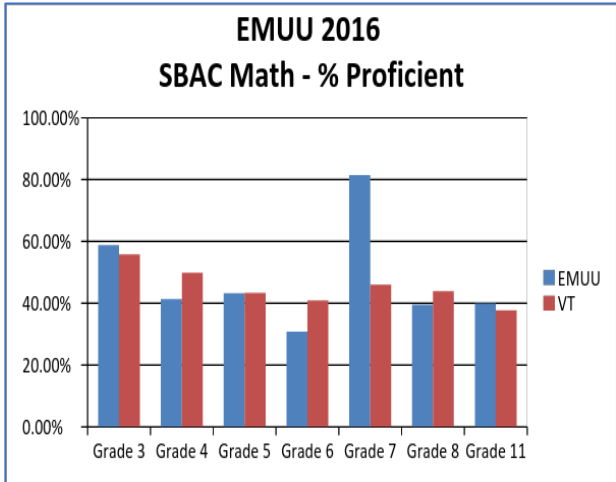
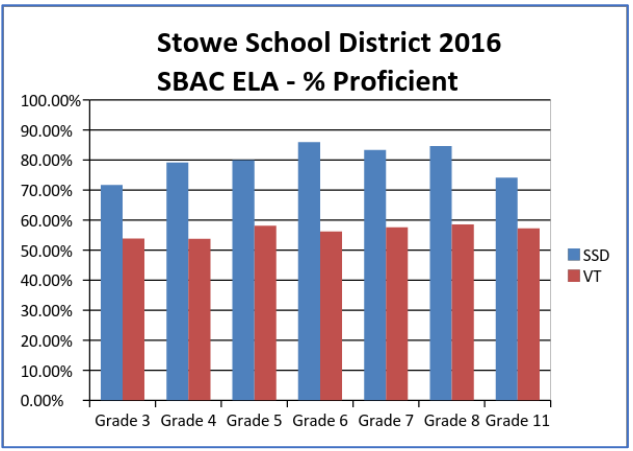
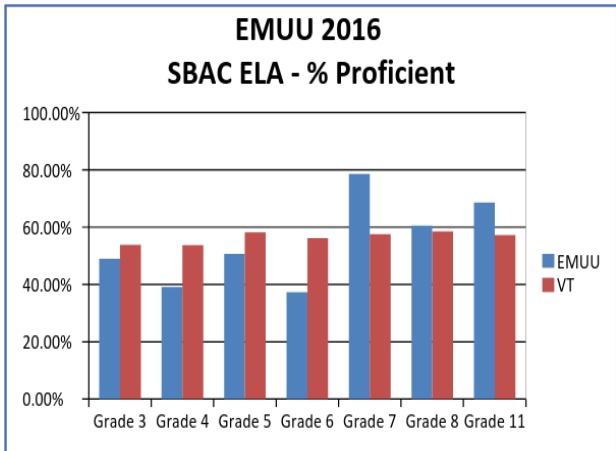
Section 3: Student Performance

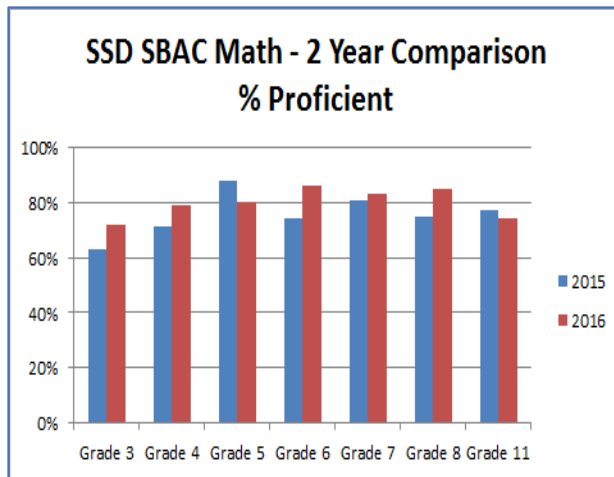
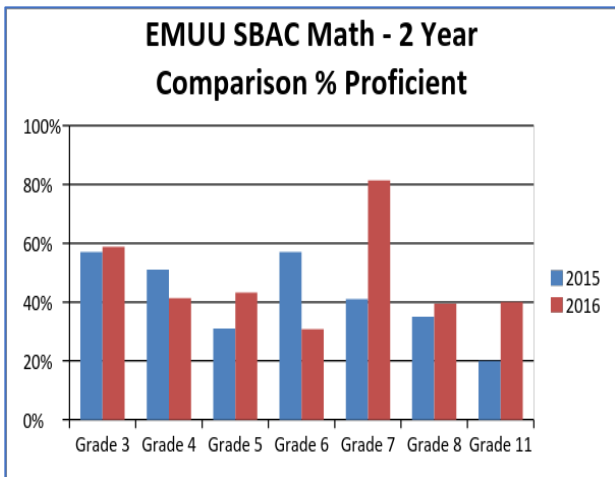
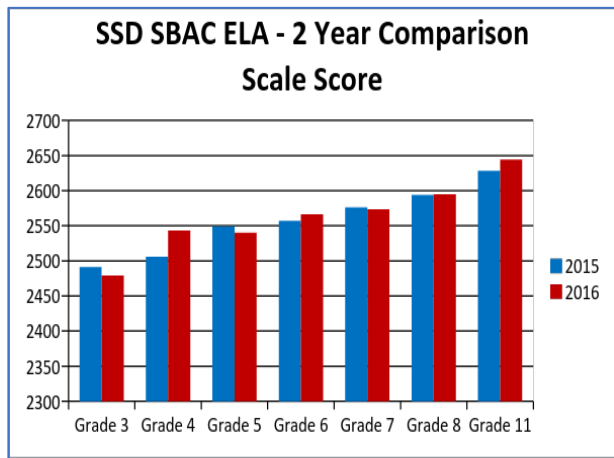
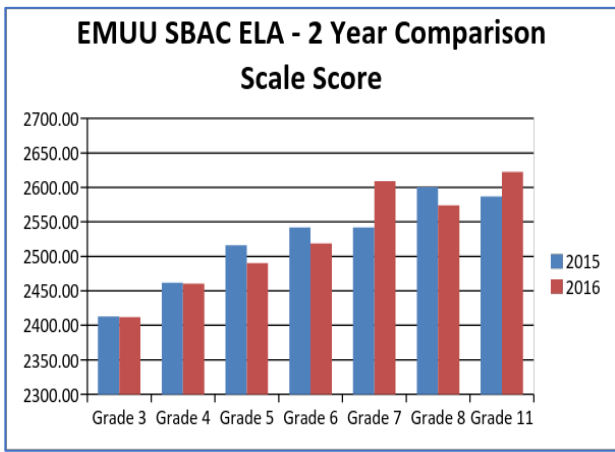
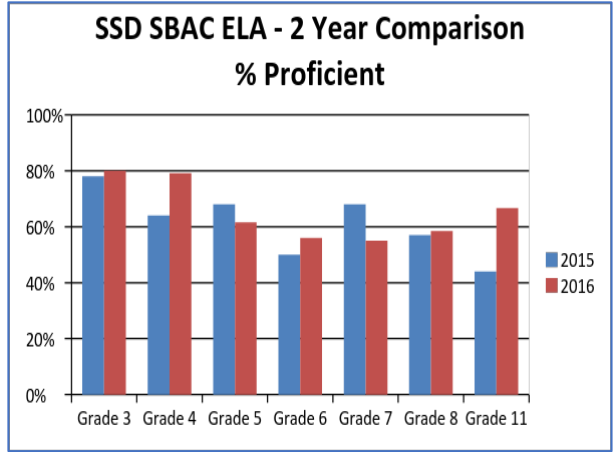
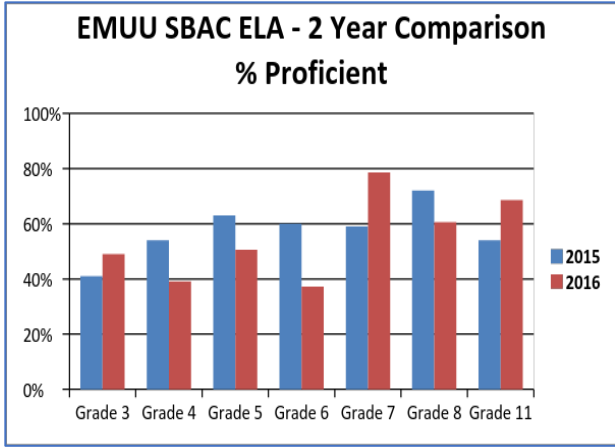
Part A: NECAP and SBAC Data

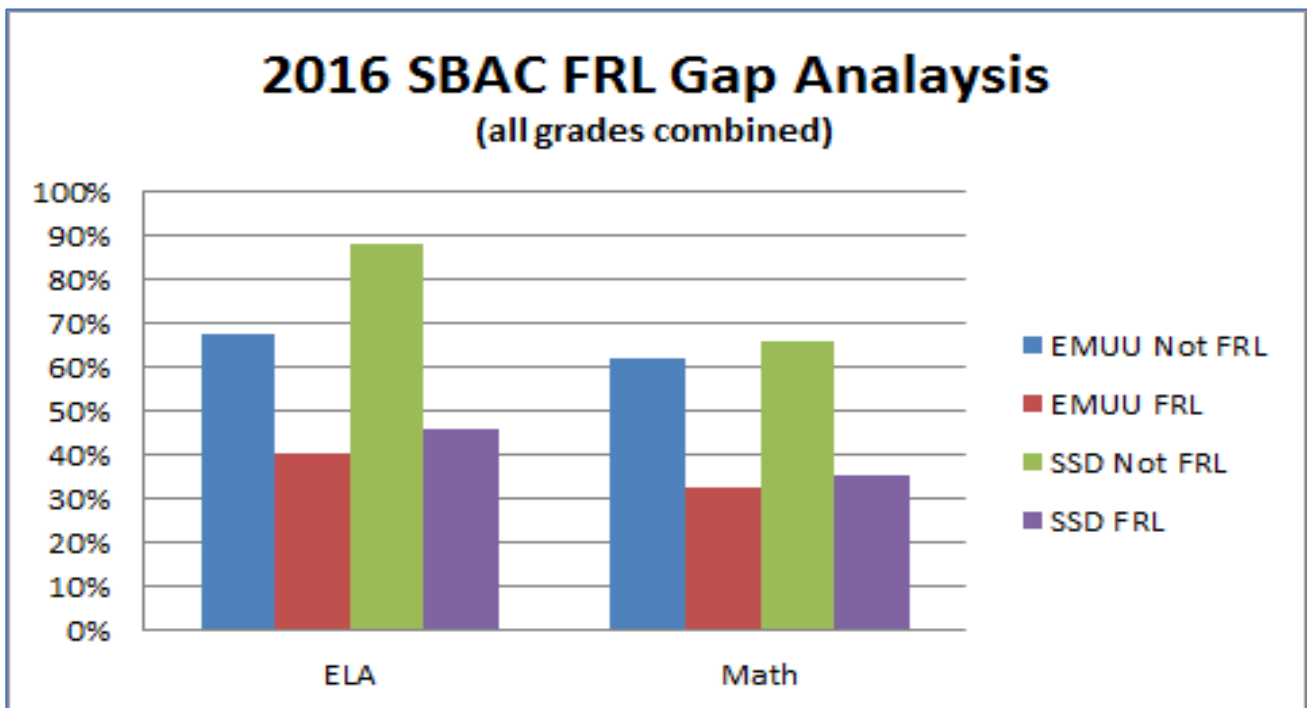
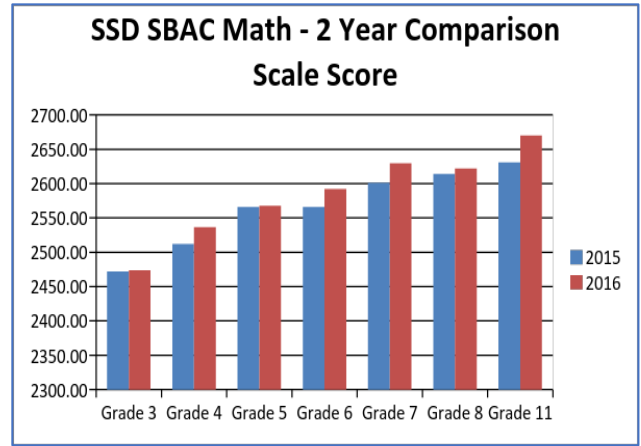
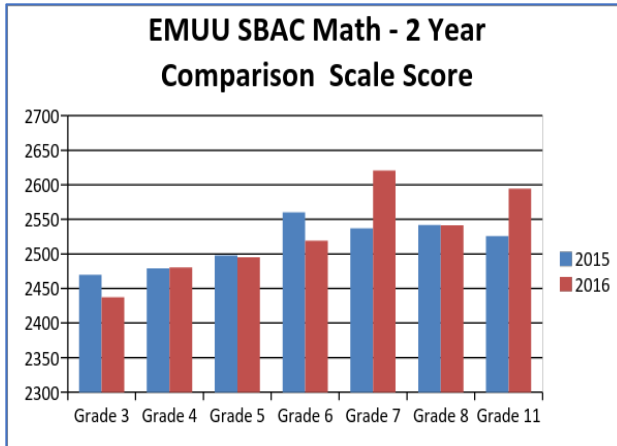
Introduction:

In assessing the performance of LSSU students, the district examined NECAP scores in reading, math, and writing going back to 2005 as well as the last two years of SBAC data (2015 and 2016). In addition to analyzing the results of LSSU students in comparison to student performance across Vermont, the data was disaggregated to assess the nature and extent of the performance gap between students who are economically disadvantaged (Free and Reduced Lunch) and those who are not. Finally, changes in student performance in both EMUU and Stowe was compared using the past two years of SBAC data both in terms of percent proficient and changes in scaled scores.

This data is reported in the following charts. *Note: For a full examination of all student performance data, see Appendix F.*







Overview: NECAP Assessment Results

Historical NECAP assessment results reflect overall higher percentages of students proficient in reading and mathematics in Stowe schools as compared to Morrystown schools.* It is important to note, however, that Morrystown serves roughly twice as many students who are economically disadvantaged (eligible for free/reduced lunch, FRL). The difference between Stowe and Morrystown student performance is smaller when comparing students not economically disadvantaged (FRL). The achievement gap between students who are economically disadvantaged (FRL) and those who are not is smaller in Morrystown schools as compared to Stowe schools.

* Note: NECAP data for EMUU was for Morrystown schools only as Elmore was a separate district throughout the duration of the NECAP administration and Elmore school's population is too small for public reporting of student assessment results.

Overview: SBAC Assessment Results

With the transition to SBAC, the percentage of Stowe students who are proficient continues to be higher in than in Morristown. The differences in overall student performance are less pronounced when looking at data through the lens of scaled scores. The difference between Stowe and Elmore-Morristown student performance is smaller when comparing students not economically disadvantaged (FRL). The achievement gap between students who are economically disadvantaged (FRL) and not is smaller in Elmore-Morristown schools as compared to Stowe schools.

Key Findings – NECAP and SBAC Performance Data

1. Both systems experience differences in student outcomes between students who are economically disadvantaged (FRL) and those who are not.
2. EMUU schools serve about twice as many students who are economically disadvantaged (FRL) and appear to have smaller achievement gaps, in some cases due to lower proficiency levels among students who are not economically disadvantaged (FRL), and at some grade levels, strong performance by all students, those who are economically disadvantaged and those who are not.
3. SSD spends slightly more per student overall as compared to EMUU, and EMUU spends more on supports for students who are economically disadvantaged (FRL).
4. Our data generally shows that on average students in all schools of Elmore-Morristown and Stowe perform as well or better than Vermont students.

Summary Conclusions and Recommendations for Action – Student Assessment Data

In examining student performance for the districts in LSSU, we believe there is greater transparency and accountability for student outcomes when structured by school and school district, as has been the practice given our current governing structures, as compared to a single reporting system for a merged organization. We want to resist any temptation to paper over existing differences in student performance within and between our schools by consolidating results and comparing averages.

When it comes to comparing student performance in LSSU with students across Vermont, we assert that EMUU and Stowe have *a demonstrated capacity*, both individually and jointly, to achieve educational excellence. The schools in our supervisory union compare favorably to schools across Vermont. Some might even argue that our schools are “good enough” using those metrics. We believe that such sentiments, even when grounded in performance data, are contrary to the very goal of continuous improvement and antithetical to the central mission of LSSU.

We want to continue to capitalize on our existing accountability systems to drill down into the performance of our schools and bring to the surface data that will assist us in mobilizing our communities in support of specific initiatives designed to make to make those schools better. We want to challenge and learn from each other by continuing to set common goals, support

targeted instructional reforms based on the specific matrix of need in each of our schools, and continue to assess our individual and collective progress together.

Moving forward, LSSU has identified the following action items: *(In conjunction with the action items articulated earlier in this report under “Program Review” - see page 24)*

1. Continue the newly established practice of having all board members meet to examine student performance data and review and revise LSSU’s Action Plan, as well as the current practice of attending each other’s district’s budget meetings to build a shared understanding of opportunities for enhanced cooperation, equity of opportunity, fidelity of implementation of universal best practice, and areas where differences make sense.
2. Identify additional specific strategies for school boards to ensure a shared, collaborative focus on closing the achievement gap in all schools:
 - a. Board meeting attendance.
 - b. Common communications about student outcomes data and other subjects.
 - c. Identify additional areas of key board work where collaboration may be enriching.
3. Explore, where there are common priorities that are difficult to support in individual districts, ways to work together such as with shared staff.
4. Reframe data reporting to compare outcomes with top performing systems in Vermont, rather than Vermont averages. Set specific goals for student outcomes that reflect very high levels of student performance for all student groups.
5. Continue to plan and implement joint-district, professional development programs that address the instructional challenges facing both districts.

Part B: Postsecondary Outcomes

Introduction:

One central issue that the committee wished to explore focused on assessing the post-secondary activities of LSSU graduates and the specific rates of enrollment, persistence, and completion of graduates who matriculated to college. To get a picture of our students' lives after high school, the district examined the post-secondary reports published by the Vermont Student Assistance Corporation (VSAC) and the National Clearing House.

VSAC

The Vermont Student Assistance Corporation has been studying the post-secondary decisions of Vermont seniors for a number of years. Students are surveyed in the spring of their senior year and again the following year.

While the focus of the questions on their post-secondary surveys has evolved over the years, there remains a core range of data that provided the district with an insightful window into the decision-making of their graduates. Specifically, the district focused on:

- The post-secondary plans of seniors at Peoples Academy and Stowe High School;
- The percentage of students who continued their education within six months of graduating from high school;
- The educational attainment of their parents;
- The reasons students decided not to continue their education;
- The percentage of students who reported that the ability to pay for college was a major concern.

In compiling this data, the district examined VSAC survey results from 2010-2016.

Note: For a complete review of this data see Appendix K.

In many respects, the post-secondary survey results from the Class of 2016 represent similar responses from earlier classes:

Peoples Academy:

77.9% of seniors in the Class of 2016 participated in the Senior Survey
(Of the 53 seniors who completed the survey 56.6% were female and 43.4% were male.)

N/A the % of seniors who participated in the Follow-up Senior Survey.

20% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

10% of graduates plan to earn an associates degree.

60% plan to complete a bachelors degree or higher.

80.4% agree or strongly agree high school provided them a good education.
55.7% agree or strongly agree high school gave them the skills to succeed in life.
55.8% agree or strongly agree high school gave them the skills to succeed in work or college.
56% agree or strongly agree that high school classes were rigorous and challenging.

N/A the percentage of graduates who continued their education on a full- or part-time basis within six months of high school graduation.

N/A% males and N/A% females enrolled within 6 months.

55.7% of Parent 1 had not completed a bachelor's degree or higher.

68.6% of Parent 2 had not completed a bachelor's degree or higher.

Most important Reason Seniors decided not to continue their education:

29.4%	I need a break
23.5%	I want to work to support myself
5.9 %	I need to work to support myself
5.9%	I am joining the military
11.8%	I am unsure of my plans
11.9%	Travel
5.9%	Other

23.5% reported ability to pay for college a major concern.

Stowe:

80% of seniors in the Class of 2016 participated in the Senior Survey
(Of the 40 seniors who completed the survey, 47.5% were female and 52.5% were male.)

N/A the % of seniors participated in the Follow-up Senior Survey.

0% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

0% of graduates plan to earn an associates degree.

87.1% plan to complete a bachelors degree or higher

87.5% agree or strongly agree school provided them a good education.

50% agree or strongly agree school gave them the skills to succeed in life.

66.7% agree or strongly agree school gave them the skills to work or college.

78.9% agree or strongly agree that classes were rigorous and challenging.

N/A the % of graduates who continued their education on a full or part-time basis within six months of high school graduation.

N/A % males and N/A% females enrolled within 6 months.

28.9% of Parent 1 had not completed a bachelor's degree or higher.
39.4% of Parent 2 had not completed a bachelor's degree or higher.

Most important reason seniors decided not to continue their education:

0%	I need a break
0%	I want to work to support myself
0%	I need to work to support myself
0%	I am joining the military
33.3%	I am unsure of my plans
33.3%	I want to travel
33.3%	Other (travel)

24.3% reported ability to pay for college a major concern.

Key Findings – VSAC Post-Secondary Survey Results:

1. Students indicate a number of factors affect their continuation and completion of postsecondary education, with a quarter of our students indicating that ability to pay for college was a factor from both high schools. One quarter to one third of students report needing a break as a significant factor in decisions about continuing postsecondary education.
2. There is no evidence to suggest that differences in postsecondary outcomes between EMUU and SSD would be mitigated in any way by a merger.

National Clearinghouse Data

While there is no way to measure or assess the actual academic performance of LSSU students during or after their college careers, **The National Clearing House** data specifically examines three important indices of college success: post-secondary enrollment, persistence, and completion.

Postsecondary Enrollment Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of their high school graduation date. This rate is not based on the 9th grade cohort.

Postsecondary Persistence Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of high school graduation and persisted in postsecondary education for at least three semesters within two academic school years.

Postsecondary Completion Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of their high school graduation date, and graduated within six academic school years after high school graduation.

Important Note on Data:

The National Student Clearinghouse collects enrollment data from ~98% of the postsecondary institutions that participate in Title IV Student Loans. While this captures the majority of postsecondary enrollments, it may not include many trade, vocational, military, and international institutions, or apprenticeship programs. This report does not include publicly tuitioned students that attend out-of-state high schools. Also, students and schools can opt for a Family Educational Rights and Privacy Act (FERPA) blocker on their enrollment records and therefore not be included in NSC reports.

In compiling and assessing this data, the district compared the performance of LSSU students on each index with students who graduated from the State of Vermont as a whole and those that graduated from specific high schools across the state. *(To review this data in its entirety, see Appendix L.)*

One key measure of success found in these reports is the completion rate of high school students from Peoples Academy and Stowe High school who enrolled in college vis a vis their peers across Vermont. The following graph examined those rates for the Classes of 2008 and 2009 (Figure 1):

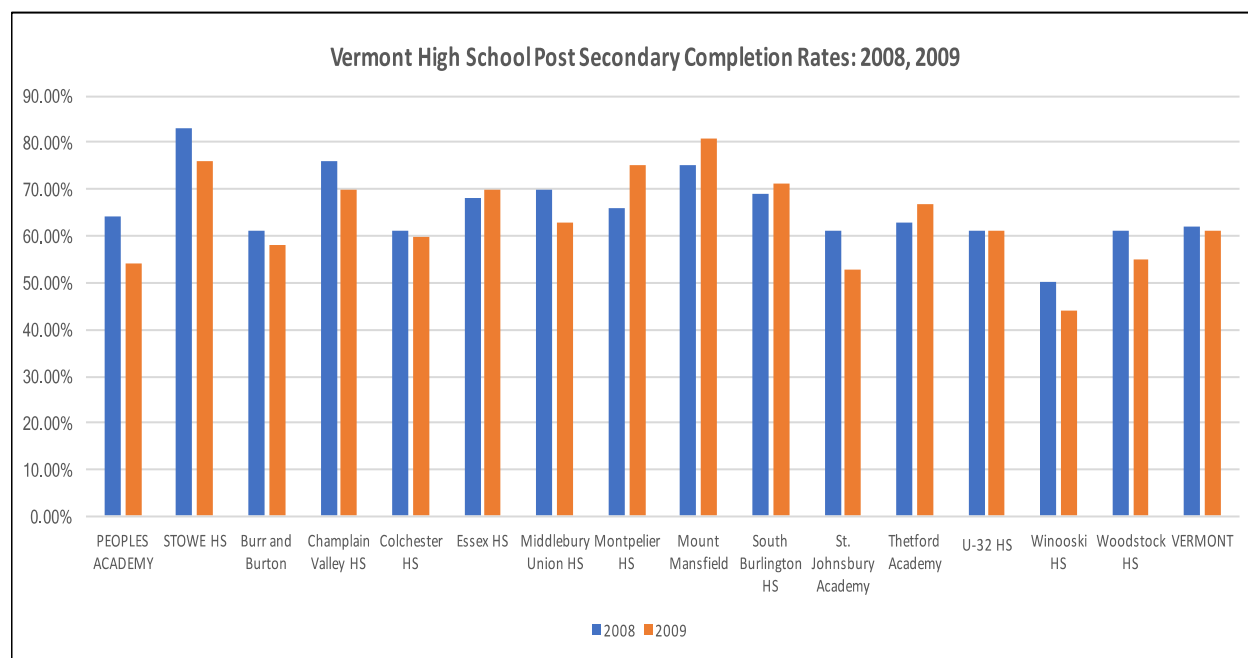


Figure 1.

In addition, the district examined the enrollment, persistence, and completion rates for college students who graduated from Peoples Academy and Stowe High School for the Class of 2008 (Figure 2) and the Class of 2009 (Figure 3) against their peers across the state.

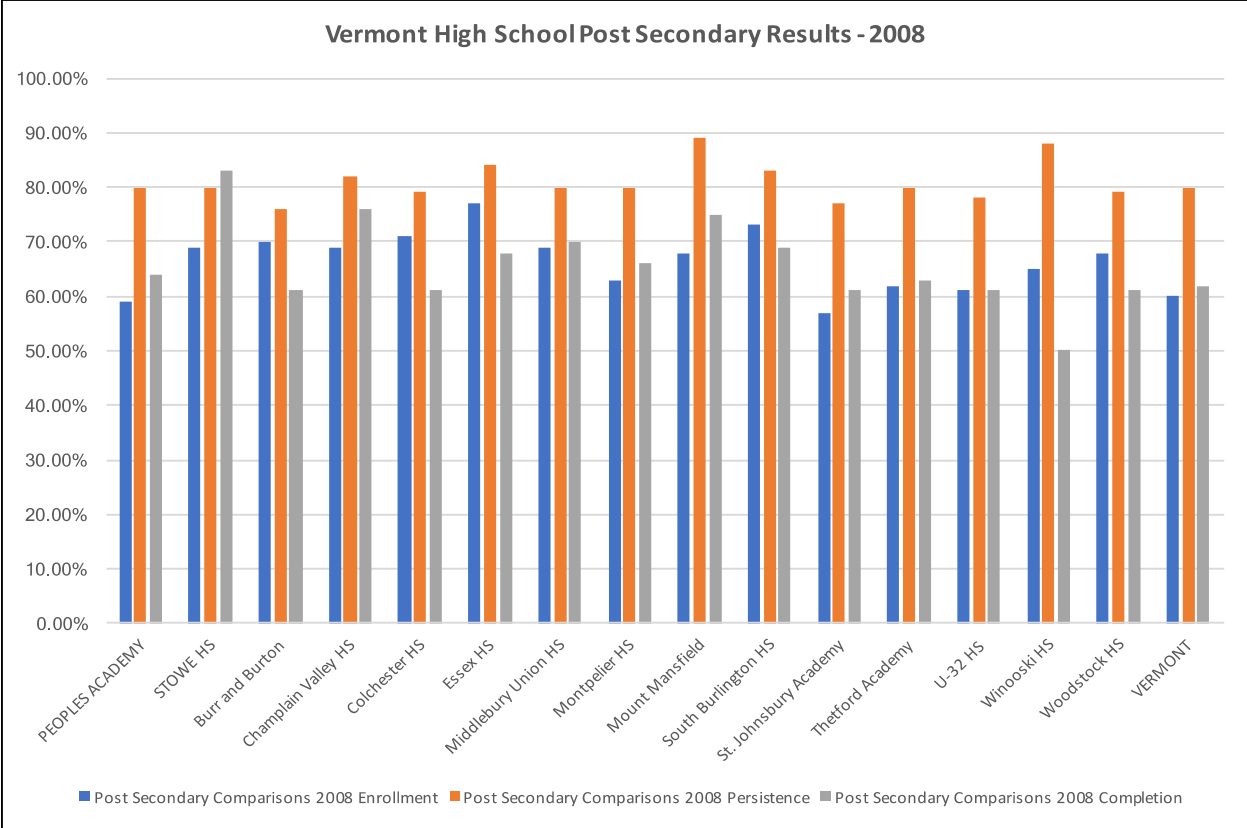


Figure 2.

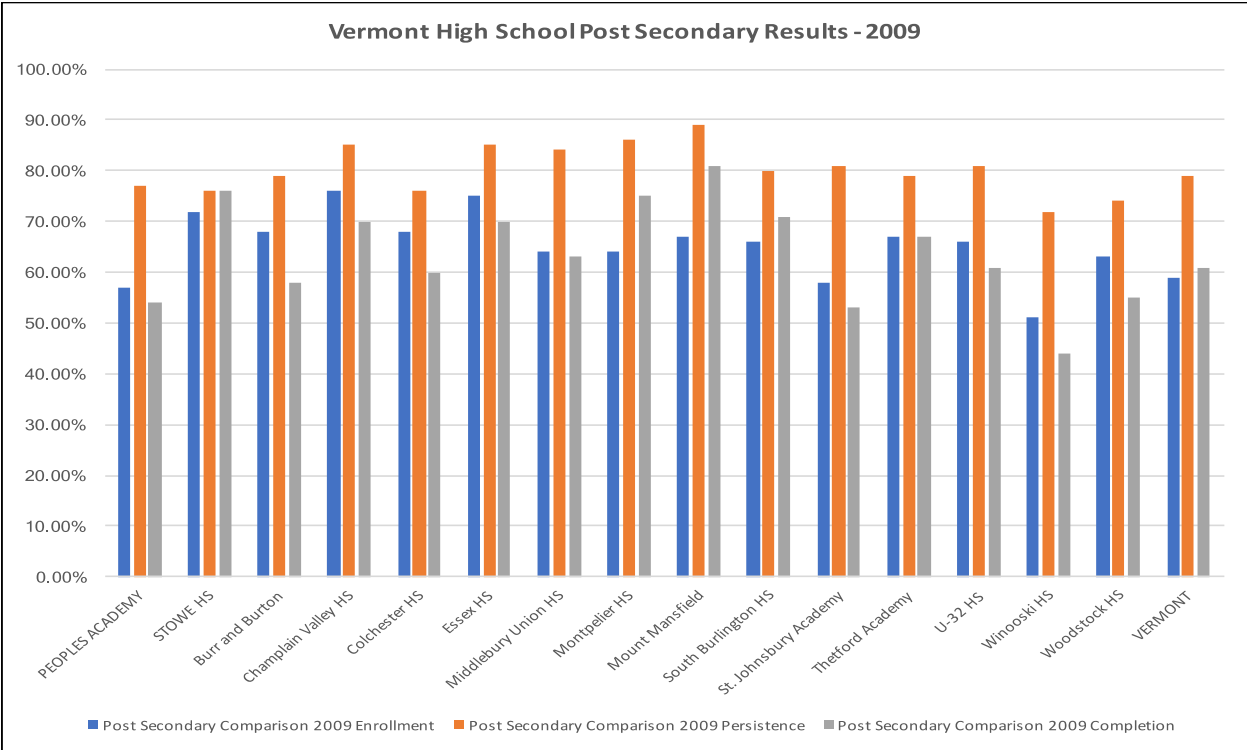


Figure 3.

Key Findings – National Clearing House Data

1. Data on student outcomes after graduation can be difficult to access and limited depending on source and format.
2. Post-secondary enrollment is higher at Stowe High School as compared to Peoples Academy.
3. At both Peoples Academy and Stowe High School, some students who begin college do not continue.
4. Post-secondary completion rates are higher for Stowe graduates than those from Peoples Academy. However, both schools compare favorably with other highly regarded high schools across Vermont. In addition, Peoples Academy's outcomes outpace what might be predicted based on demographic factors.

Summary Conclusions and Recommendations for Action – Postsecondary Outcomes

Strategies for improving post-secondary outcomes – specifically the rate of college matriculation where appropriate on a case by case basis – should be differentiated between EMUU and SSD based upon the specific factors affecting outcomes in each community and system, but can be enriched by learning from and with one another. Support for first generation college students is an example of an area where the type and scope of supports needed may differ between schools; however, collaboration between schools can assist with identifying, improving, and scaling successful strategies into the other school.

Section 4: Operational Efficiency/Finances

Part A: EMUU/Stowe Financial/Tax Rate Projections:

Introductory Note to Citizens and Taxpayers:

The Homestead Tax Rate for a given school district (used to calculate local tax rates) is not based on the budgeted spending of an individual school district but on a spending figure identified in annual reports as the “education spending per equalized pupil” – this is the amount a district spends to educate a given student, equalized across the entire state. While other factors come in to play, particularly the size of the property yield set each year by the State, changes in the rate of education spending per equalized student in each district is what drives changes in local tax rates.

Introduction - Current Spending Data:

1. FY18 Education Spending per Equalized Pupil

In reviewing these projections, it is useful to remember that in any merger the starting point for understanding the tax consequences is to remember one key figure – the educational cost per equalized pupil for each district. That is the figure that determines the homestead tax rate (before the common level of appraisal is factored in to arrive at each community’s local tax rate). Generally speaking, in any merger the community with the higher educational cost per equalized pupil will see a reduction in their taxes and the community with the lower educational cost will see an increase in their taxes since the averaged cost per equalized pupil due to the merger will be somewhere in the middle – unless the unified district takes steps to cut spending moving forward. That is why the incentives are important, because they lower the tax rate over four years (8, 6, 4, and 2 cents), reducing the tax impact on the district with the lowest education cost per equalized pupil and smoothing out the transition.

In the case of a merger between Elmore-Morristown and Stowe, the key financial figures for FY18, prior to any merger are:

EMUU:	\$14,390.63
Stowe:	\$15,011.17

In such a merger, Stowe should see a slight reduction in its property taxes with or without the incentives. However, because the Elmore-Morristown district has been experiencing an ongoing, slight decline in the number of pupils it serves and Stowe’s enrollments have been increasing, when one projects out those trend lines over the next five years, it is Stowe’s tax rates that increase slightly in any unification.

Financial Model Projections

Important Caveats on Model Use:

1. ***This model was created for purposes of comparative illustrations, and under no circumstances should be relied upon to forecast future actual tax rates resulting, if and when, a merger occurs or does not occur.***
2. ***This model does not account for, nor is intended to account for policy decisions, management decisions and/or changes in any factor reflected in the model, now or over time.***

The MD Model:

This financial model utilized in this study is designed to predict trend lines in future homestead tax rates through FY23 for the communities of Elmore, Morristown, and Stowe using two distinct scenarios: (1) as a merged district; or (2) remaining two separate PreK-12 districts within their existing supervisory unions (the existing governance structures). The model projects:

- I. The trend lines in Educational Spending and Local Tax rates for a merged district beginning in **FY19** (Merged Scenario);
- II. The trend lines in Educational Spending and Local Tax rates for these same districts should they remain as they are (No Change Scenario);
- III. The differences in tax rates between a Merged Scenario and a No Change Scenario by computing and comparing the total increases/decreases in tax liabilities through FY23.

In addition, the model was used to project the tax impact for all three communities of a merger without incentives if required under some future state-wide plan.

Assumptions:

- A. The Model assumes that the new unified district would come into existence in FY19.
- B. The Model uses existing financial data from FY13 and FY18 from each individual district involved in this study for determining the baseline for educational spending, equalized pupils, education spending per equalized pupil, etc., for the new merged district.
- C. It considers the previous five-year average for determining the change rates for education spending and equalized pupils.
- D. 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.
- E. 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.
- F. The Model's default setting projects the taxes on a **\$250,000 house**.

- G. The projected results in the current model assumes **no operational savings in year one due to unification** in the first year of operation; in addition, the projected growth in education spending used in the model for the new district is 4.04% – the aggregate total of the spending growth rates used for projecting the tax rates in the stand-alone scenario. Therefore, the tax savings projected in the model come from the new unified rate and the tax incentives over the first four years of the new unified union’s existence (8, 6, 4, 2 cents off the homestead tax rate) built into the law.

Commercial Tax Rates and Income Sensitive Tax Payers:

Note 1: *The non-homestead rates (commercial and second-home owners) do not benefit from Act 46 incentives*

Note 2: *Tax Rate Projections/Trend Lines and Income Sensitivity Tax Payers:*

*These financial projections **do not specifically model for individuals who qualify for income sensitivity on their property taxes**, the specific tax savings due to the tax incentives on the homestead tax rate over 4 years (8, 6, 4, 2 cents) granted to communities/districts that elect to merge. However, both Act 153 and Act 46 state that: **“The household income percentage shall be calculated accordingly”** in connection with both the tax rate decreases and the 5% protection available for each type of incentivized merger.*

*In short, those taxpayers whose education taxes are income sensitized **will receive** tax benefits from merger incentives. According to the AOE, homestead income sensitized taxpayers **will see the same proportional reduction in their education taxes that taxpayers, whose tax rates are based on property value, will see as a result of a merger** that qualifies for tax incentives.*

Rates of Change:

The model allows the user to manipulate the rates of change in:

- a) Educational spending for each district and the Middle/High School Union budget and for the new district as a whole.
- b) Equalized pupils for each district and for the new district as a whole.
- c) Educational Grand List for each town. [In the current iteration of this model, the model left the GL unchanged (0%).]

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 FY13 and FY18.**

The historical rates of change applied to the model were:

Changes:				
		Ed Spending Inc.	EqPupil Inc	GL Inc
	Stowe	4.82%	2.49%	0%
	Elmore/Morristown	4.03%	-0.9%	0%
	EMUU/Stowe	4.04%		

MD Model Results: <u>Incentivized</u> Merger

	Equalized Homestead Tax Rates – Incentivized Merger						
	FY17	Fy18	FY19	FY20	FY21	FY22	FY23
Unified							
Stowe Unified	1.5015	1.4775	1.4181	1.4890	1.5635	1.6417	1.7299
EMUU Unified	1.4507	1.4164	1.4181	1.4890	1.5635	1.6417	1.7299
No Change							
Stowe	1.5015	1.4775	1.5111	1.5454	1.5806	1.6165	1.6532
EMUU	1.4507	1.4164	1.4869	1.5608	1.6385	1.7200	1.8056

Unified Union; Model 1 (Incentivized)		FY17	FY18	FY19	FY20	FY21	FY22	FY23	Total
	Stowe								
	Homestead Tax Rate (No CLA)	\$1.5015	\$1.4775	\$1.4181	\$1.4890	\$1.5635	\$1.6417	\$1.7299	
	Tax \$ (homestead)	\$7,805,557	\$7,680,793	\$7,372,001	\$7,740,575	\$8,127,864	\$8,534,387	\$8,992,896	
	Tax savings due to unification	\$0	\$0	\$483,461	\$293,196	\$88,894	(\$131,002)	(\$398,725)	\$335,823
	Tax \$ on \$250K home	\$3,754	\$3,694	\$3,545	\$3,723	\$3,909	\$4,104	\$4,325	
	Tax savings on \$250K home	\$0	\$0	\$233	\$141	\$43	(\$63)	(\$192)	\$162
	Elmore								
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4181	\$1.4890	\$1.5635	\$1.6417	\$1.7299	
	Tax \$ (homestead)	\$1,265,488	\$1,235,567	\$1,237,050	\$1,298,898	\$1,363,886	\$1,432,103	\$1,509,042	
	Tax savings due to unification	\$0	\$0	\$60,016	\$62,633	\$65,425	\$68,303	\$66,035	\$322,413
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,545	\$3,723	\$3,909	\$4,104	\$4,325	
	Tax savings on \$250K home	\$0	\$0	\$172	\$180	\$188	\$196	\$189	\$924
	Morristown								
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4181	\$1.4890	\$1.5635	\$1.6417	\$1.7299	
	Tax \$ (homestead)	\$4,628,901	\$4,519,456	\$4,524,881	\$4,751,109	\$4,988,824	\$5,238,345	\$5,519,774	
	Tax savings due to unification	\$0	\$0	\$219,527	\$229,100	\$239,310	\$249,840	\$241,544	\$1,179,322
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,545	\$3,723	\$3,909	\$4,104	\$4,325	
	Tax savings on \$250K home	\$0	\$0	\$172	\$180	\$188	\$196	\$189	\$924
	EMUUSTOWE TOTALS								
	Tax \$ raised in town	\$13,699,945	\$13,435,816	\$13,133,932	\$13,790,582	\$14,480,574	\$15,204,834	\$16,021,711	\$0
	Tax savings due to unification	\$0	\$0	\$763,005	\$584,929	\$393,630	\$187,141	(\$91,146)	\$1,837,558

No Change	FY17	Fy18	FY19	FY20	FY21	FY22	FY23	Total
Stowe								
Homestead Tax Rate (No CLA)	\$1.5015	\$1.4775	\$1.5111	\$1.5454	\$1.5806	\$1.6165	\$1.6532	
Tax \$ (homestead)	\$7,805,557	\$7,680,793	\$7,855,462	\$8,033,771	\$8,216,759	\$8,403,385	\$8,594,170	
Tax savings due to unification								
Tax \$ on \$250K home	\$3,754	\$3,694	\$3,778	\$3,864	\$3,952	\$4,041	\$4,133	
Tax savings on \$250K home								
Elmore								
Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4869	\$1.5608	\$1.6385	\$1.7200	\$1.8056	
Tax \$ (homestead)	\$1,265,488	\$1,235,567	\$1,297,066	\$1,361,531	\$1,429,311	\$1,500,406	\$1,575,077	
Tax savings due to unification								
Tax \$ on \$250K home	\$3,627	\$3,541	\$3,717	\$3,902	\$4,096	\$4,300	\$4,514	
Tax savings on \$250K home								
Morristown								
Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4869	\$1.5608	\$1.6385	\$1.7200	\$1.8056	
Tax \$ (homestead)	\$4,628,901	\$4,519,456	\$4,744,408	\$4,980,208	\$5,228,134	\$5,488,185	\$5,761,318	
Tax savings due to unification								
Tax \$ on \$250K home	\$3,627	\$3,541	\$3,717	\$3,902	\$4,096	\$4,300	\$4,514	
Tax savings on \$250K home								
EMUU/STOWE TOTALS								
Tax \$ raised in town	\$13,699,945	\$13,435,816	\$13,896,936	\$14,375,511	\$14,874,204	\$15,391,975	\$15,930,565	
Tax savings due to unification	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

Key Findings: Merger With Incentives:

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 throughout the Supervisory Union are combined to arrive at a unified homestead tax rate. The difference between the two trend lines (no change vs. merger) represent the tax savings in the homestead tax rate due to the incentives and the collective impact of a unified tax rate.
4. 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 \$10,160. The model is not designed to account for future variations in the yield so it is constant at \$10,160 throughout the modeling years. **Using a constant value creates a conservative estimate in future tax savings.**
5. 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.
6. 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.
7. The growth in education spending rate used in the model for the new district is the aggregate of the individual districts' growth rates: 4.04%. FY2019 is the assumed date that the new district comes into existence. The estimated educational spending per equalized pupil in year one is \$15,220.76.
8. Under Act 46, during the life of the incentives in a preferred merger, the homestead tax rate can only go up or down 5% from the previous homestead rate. In the model, the new unified district is protected from tax increases over 5% as the incentives do not fully cover the projected increases in years two through four.
9. By FY2023, all the incentives are gone, and the homestead tax rate in the new unified district is based solely on the ongoing changes in educational spending and equalized pupil counts
10. **These projections translate into a cumulative tax impact on a \$250,000 home over the next five years of:**

Elmore	\$ 924.00 tax savings: ~\$185.00 per year savings
Morristown	\$ 924.00 tax savings: ~\$185.00 per year savings
Stowe	\$ 162.00 tax increase: ~\$ 32.00 per year increase

MD Model Results: <u>Non-Incentivized</u> Merger

Equalized Homestead Tax Rates - No Incentives

	FY17	Fy18	FY19	FY20	FY21	FY22	FY23
Unified							
Stowe Unified	1.5015	1.4775	1.4981	1.5536	1.6107	1.6695	1.7299
Elmore Unified	1.4507	1.4164	1.4981	1.5536	1.6107	1.6695	1.7299
Morristown Unified	1.4507	1.4164	1.4981	1.5536	1.6107	1.6695	1.7299
No Change							
Stowe	1.5015	1.4775	1.5111	1.5454	1.5806	1.6165	1.6532
Elmore	1.4507	1.4164	1.4869	1.5608	1.6385	1.7200	1.8056
Morristown	1.4507	1.4164	1.4869	1.5608	1.6385	1.7200	1.8056

Unified Union; Model 2 (Non Incentivized)		FY17	FY18	FY19	FY20	FY21	FY22	FY23	Total
Stowe									
	Homestead Tax Rate (No CLA)	\$1.5015	\$1.4775	\$1.4981	\$1.5536	\$1.6107	\$1.6695	\$1.7299	
	Tax \$ (homestead)	\$7,805,557	\$7,680,793	\$7,787,882	\$8,076,399	\$8,373,234	\$8,678,906	\$8,992,896	
	Tax savings due to unification	\$0	\$0	\$67,581	(\$42,628)	(\$156,475)	(\$275,521)	(\$398,725)	(\$805,768)
	Tax \$ on \$250K home	\$3,754	\$3,694	\$3,745	\$3,884	\$4,027	\$4,174	\$4,325	
	Tax savings on \$250K home	\$0	\$0	\$33	(\$21)	(\$75)	(\$133)	(\$192)	(\$388)
Elmore									
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4981	\$1.5536	\$1.6107	\$1.6695	\$1.7299	
	Tax \$ (homestead)	\$1,265,488	\$1,235,567	\$1,306,836	\$1,355,250	\$1,405,060	\$1,456,353	\$1,509,042	
	Tax savings due to unification	\$0	\$0	(\$9,770)	\$6,281	\$24,251	\$44,053	\$66,035	\$130,849
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,745	\$3,884	\$4,027	\$4,174	\$4,325	
	Tax savings on \$250K home	\$0	\$0	(\$28)	\$18	\$70	\$126	\$189	\$375
Morristown									
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4981	\$1.5536	\$1.6107	\$1.6695	\$1.7299	
	Tax \$ (homestead)	\$4,628,901	\$4,519,456	\$4,780,145	\$4,957,235	\$5,139,430	\$5,327,049	\$5,519,774	
	Tax savings due to unification	\$0	\$0	(\$35,737)	\$22,974	\$88,704	\$161,136	\$241,544	\$478,621
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,745	\$3,884	\$4,027	\$4,174	\$4,325	
	Tax savings on \$250K home	\$0	\$0	(\$28)	\$18	\$70	\$126	\$189	\$375
EMUU/STOWE TOTALS									
	Tax \$ raised in town	\$13,699,945	\$13,435,816	\$13,874,863	\$14,388,884	\$14,917,724	\$15,462,308	\$16,021,711	\$0
	Tax savings due to unification	\$0	\$0	\$22,073	(\$13,373)	(\$43,520)	(\$70,333)	(\$91,146)	(\$196,298)

No Change		FY17	Fy18	FY19	FY20	FY21	FY22	FY23	Total
Stowe									
	Homestead Tax Rate (No CLA)	\$1.5015	\$1.4775	\$1.5111	\$1.5454	\$1.5806	\$1.6165	\$1.6532	
	Tax \$ (homestead)	\$7,805,557	\$7,680,793	\$7,855,462	\$8,033,771	\$8,216,759	\$8,403,385	\$8,594,170	
	Tax savings due to unification								
	Tax \$ on \$250K home	\$3,754	\$3,694	\$3,778	\$3,864	\$3,952	\$4,041	\$4,133	
	Tax savings on \$250K home								
Elmore									
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4869	\$1.5608	\$1.6385	\$1.7200	\$1.8056	
	Tax \$ (homestead)	\$1,265,488	\$1,235,567	\$1,297,066	\$1,361,531	\$1,429,311	\$1,500,406	\$1,575,077	
	Tax savings due to unification								
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,717	\$3,902	\$4,096	\$4,300	\$4,514	
	Tax savings on \$250K home								
Morristown									
	Homestead Tax Rate (No CLA)	\$1.4507	\$1.4164	\$1.4869	\$1.5608	\$1.6385	\$1.7200	\$1.8056	
	Tax \$ (homestead)	\$4,628,901	\$4,519,456	\$4,744,408	\$4,980,208	\$5,228,134	\$5,488,185	\$5,761,318	
	Tax savings due to unification								
	Tax \$ on \$250K home	\$3,627	\$3,541	\$3,717	\$3,902	\$4,096	\$4,300	\$4,514	
	Tax savings on \$250K home								
EMUU/STOWE TOTALS									
	Tax \$ raised in town	\$13,699,945	\$13,435,816	\$13,896,936	\$14,375,511	\$14,874,204	\$15,391,975	\$15,930,565	
	Tax savings due to unification	\$0	\$0	\$0	\$0	\$0	\$0	\$0	

Key Findings: Merger Without Incentives:

1. In reviewing the data from the financial model, the committee noted that:
2. 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.**
3. A required merger under the state-wide plan would not receive tax incentives under the law (8, 6, 4, 2 cents over four years off the homestead tax rate).
4. All education spending and all equalized pupils throughout the Supervisory Union are combined to arrive at a unified homestead tax rate. The difference between the two trend lines (no change vs. merger) represent the tax savings in the homestead tax rate due to the incentives and the collective impact of a unified tax rate.
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 \$10,160. The model is not designed to account for future variations in the yield so it is constant at \$10,160 throughout the modeling years. **Using a constant value potentially creates a conservative estimate in future tax savings as the local share of the tax burden must increase while the state share stays fixed.**
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 the same as for the incentivized model – the aggregate of the individual districts’ growth rates: 4.04%. FY2019 is the assumed date that the new district comes into existence. The estimated educational spending per equalized pupil in year one is the same as in the incentivized model \$15,220.76.
9. There are no protections or throttles on tax rate increases in merger under the state-wide plan.
10. By FY2023, all the incentives are gone, and the homestead tax rate in the new unified district is based solely on the ongoing changes in educational spending and equalized pupil counts.
11. **These projections translate into a cumulative tax impact on a \$250,000 home over the next five years of:**

Elmore	\$ 375.00 tax savings: ~\$75.00 per year savings
Morristown	\$ 375.00 tax savings: ~\$75.00 per year savings
Stowe	\$ 388.00 tax increase: ~\$78.00 per year increase

Summary Findings from Financial Projections:

Unifying EMMU and Stowe with or without tax incentives results in marginal savings for tax payers in Elmore and Morristown and a slight increase in taxes for the homeowners in Stowe. This is to be expected given the comparable education spending per equalized pupil in both districts – itself an important measure of the existing equality of taxpayer commitment afforded both districts. It should be noted that citizens have consistently supported LSSU schools over the years by approving their districts’ budgets year in and year out.

Furthermore, both EMMU and Stowe are operationally lean districts delivering a quality educational program in an operationally efficient manner comparable with the most cost-effective districts in the state. As will be argued later in this report, LSSU has already wrung out of its operations, particularly in the union of Elmore and Morristown, efficiencies in its operations that have already benefits students and taxpayers alike.

With no additional operational efficiencies to offset existing trend lines in education spending, the only discernible impact in these projections on tax rates comes from the application of state tax incentives, which are transitory at best.

In conclusion, we can find no evidence to suggest that unification, in and of itself, would lead to greater operational savings. That work has already been accomplished. Therefore, creating a single, unified budget assessed across the grand lists of Elmore, Morristown, and Stowe would result in no discernable increase in LSSU's capacity to increase educational opportunity or assure greater equality (educationally or financially), nor result in marked savings for our taxpayers.

Part B: Debt

Analysis:

EMUU

The following bonds and loans are presently outstanding:

	<u>Amt. Borrowed</u>	<u>Pd. thru 6/30/16</u>	<u>Balance</u>
1998 Bond	\$2,200,000	\$1,870,000	\$ 330,000
1999 Bond	\$2,355,000	\$1,895,000	\$ 460,000

The payment due on each of the above commitment for FY17-18 is as follows:

	<u>Principal</u>	<u>Interest</u>
1998 Bond	\$ 110,000	\$ 8,525
1999 Bond	\$ 115,000	\$ 15,475

Final Payment for 1998 Bond is in 2018-2019.

Final Payment for 1999 Bond is in 2019-2020.

New Debt considerations are for a new, 30-year bond for a maximum of \$14.5M. This debt will be partially offset by the retirement of the current 20 year bonds.

SSD

	<u>Amt. Borrowed</u>	<u>Pd. thru 6/30/16</u>	<u>Balance</u>
2008 Bond	\$1,800,000	\$ 630,000	\$1,170,000
2010 Bond	\$ 600,000	\$ 150,000	\$ 450,000

The payment due on each of the above commitments for FY17-18 is as follows:

	<u>Principal</u>	<u>Interest</u>
2008 Bond	\$ 90,000	\$ 45,200
2010 Bond	\$ 30,000	\$ 18,025

Final Payment for 2008 Bond is in 2028-2029.

Final Payment for 2010 Bond is in 2030-2031.

New Debt considerations are forthcoming, with an anticipated Capital Committee beginning its work in Fall, 2017. The 2015 Facilities Audit offered a very rough estimate of \$6.5M for increased instructional space and improvements to meet current needs.

Key Findings – Debt

Given the relative similarities between education spending per equalized pupil, which include current debt, debt does not represent a significant factor with regard to governance structure.

Part C: Operational Efficiencies

Introduction:

Over the past nine years, the operational insights gleaned in every phase of our ongoing strategic process have led to increased efficiencies, enhanced educational opportunities for our students, and better professional development opportunities of our faculty and staff. Examples of those improvements include:

Operations:

- Developing a single master agreement with competitive salaries for teachers throughout LSSU, centered on a shared commitment to attract and retain top quality, professional educators with values aligned to LSSU's student-centered mission.
- Restructuring the use of school and administrative space (saving \$150,000).
- Restructuring core services to a supervisory-union-wide model to enhance quality and cost effectiveness for multiple programs:
 - Food service administration
 - Health services
 - All of special education, including paraeducators
 - Transportation
 - Technology administration
 - Human Resources coordination
 - Pre-K administration and programming
 - English Language Learner supports
 - Wellness curriculum and program coordination
- Common Learning Management System (LMS) and Student Information System (SIS).
- Cooperative contract for high speed internet access through fiber.
- Cooperative contract for facilities audits.
- Managed education spending per equalized pupils (and homestead tax rates), staffing ratios, including making significant staffing reductions in Morristown, and ultimately the formation of the Elmore-Morristown Unified Union.

Educational Opportunities:

- Full day Kindergarten for all students.
- Public pre-Kindergarten partnerships for 3-4 year olds, early adopter of universal pre-Kindergarten.
- Common supervision and evaluation system and new teacher mentoring program with peer feedback across systems.
- Increased access to technology for students in underserved schools.
- Expanded Advanced Placement and Dual Enrollment courses.
- Cooperative teams for girls hockey, baseball and softball, and member-to-member partnerships.

Professional Development:

- Common needs-based professional development, such as Curriculum Camp, Inservice Days, and annual required trainings, such as CPI.
- Teacher leadership across the supervisory union through the Curriculum Instruction and Assessment Council and Content Steering Committees.

Act 46: Core Analysis – Current Operational Efficiency

EMMU and Stowe are operationally lean districts delivering a quality educational program in an operationally efficient manner comparable with the most cost-effective districts in the state. Student Teacher Ratios and Student Administrator Ratios for the schools of Elmore-Morristown Unified Union and Stowe School District are consistently above Vermont averages.

Student-Teacher Ratio

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Lake Elmore School	22.00	18.00	20.00	20.00	19.00
Morristown Elementary Schools	12.24	15.39	15.84	14.77	13.50
Peoples Academy	12.51	10.80	9.85	10.87	10.18
Peoples Academy Middle School	12.26	12.26	11.24	10.61	12.27
Stowe Elementary School	13.58	13.16	15.47	15.17	16.11
Stowe Middle/High School	12.24	11.29	11.29	11.29	11.49
Vermont	10.73	10.61	10.56	10.55	10.45

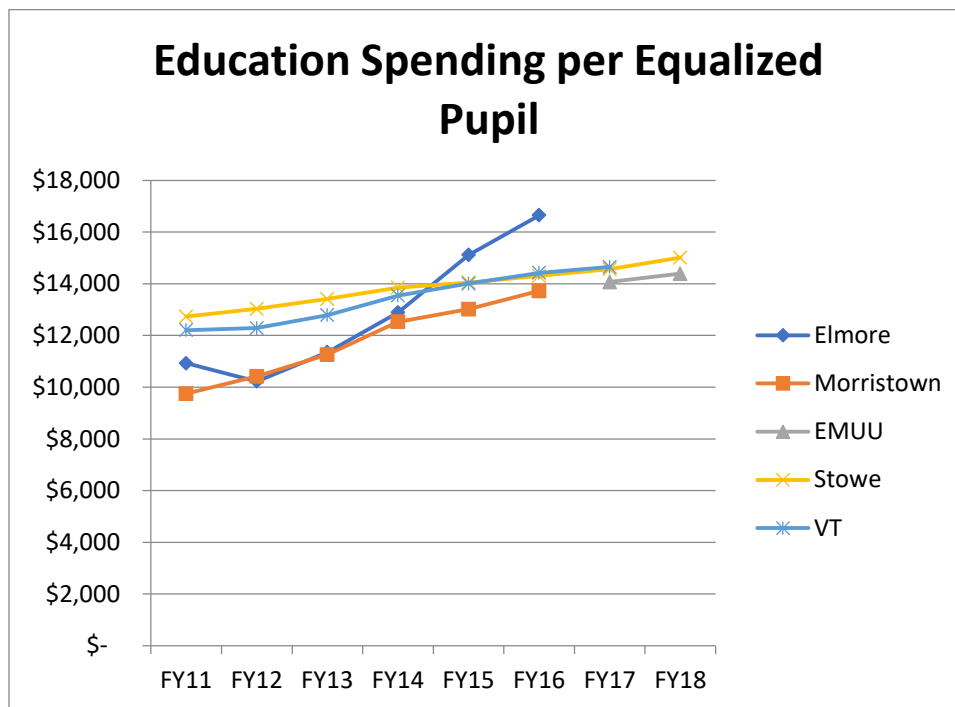
Student:Administrator Ratio

	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016
Lake Elmore School	*	*	*	*	*
Morristown Elementary School	299.00	371.00	366.00	378.00	359.00
Peoples Academy	297.00	273.00	249.00	242.00	247.00
Peoples Academy Middle Level	275.00	282.00	281.00	259.00	287.00
Stowe Elementary School	275.00	306.00	386.00	386.00	402.00
Stowe Middle/High School	209.00	199.50	203.00	203.00	206.50
Vermont		103.00	105.00	104.00	98.26

Elementary enrollments include PK, which is administered by LSSU.

Education Spending per Equalized Pupils has moderated in Stowe School District and is at or below the Vermont average. With the formation of EMUU, the trend of increasing ES/EP for Elmore has been rectified and Morristown’s consistent trend of ES/EP below Vermont averages continues for the new district.

	FY11	FY12	FY13	FY14	FY15	FY16	FY17	FY18
Elmore	\$ 10,925	\$ 10,227	\$ 11,355	\$ 12,888	\$ 15,115	\$ 16,650		
Morristown	\$ 9,749	\$ 10,417	\$ 11,257	\$ 12,532	\$ 13,019	\$ 13,724		
EMUU							\$ 14,073	\$ 14,391
Stowe	\$ 12,736	\$ 13,032	\$ 13,413	\$ 13,852	\$ 14,053	\$ 14,307	\$ 14,566	\$ 15,011
Vermont	\$ 12,204	\$ 12,287	\$ 12,789	\$ 13,546	\$ 14,009	\$ 14,421	\$ 14,651	



Data reviewed as part of governance study in 2009 indicated that “Comparative data for LSSU and seven other supervisory unions with student populations between 1,400 and 1,700 reveal that this supervisory union has over a long period of time consolidated many services provided to member school districts. Evidence of these efforts include, but are not limited to, the following: common school board policies, centralized fiscal services, coordinated curriculum and education programs, planned technology, data collection and analysis, human resources services, student assessment instruments and procedures, consolidated grants and special education.

Comparative financial data reveals that these efforts have also been accomplished with a high degree of efficiency. For example:

- LSSU has the highest student to central office personnel staff ratio
- Mid-range cost per general administration
- Next to the lowest current cost per pupil for all services among these 7 supervisory unions.”

Data from the most recent *Summary of the Annual Statistical Report of Schools (FY 2016)* suggests that the pattern of operational efficiencies at the supervisory union level has continued with the percentage of budget directed towards general administration at 1.45% of total expenditures as compared to the Vermont average of 2.35%, or roughly 62% lower.

2016 Summary of the Annual Statistical Report of Schools

Expenditures as Percent of total PreK-12 Total Expenditures

FY16	Instruction	Instructional		General Admin.	School Admin.	Student Transport.	Other Support
		Pupil Support	Staff Support				
VT	59.11%	0.09%	4.82%	2.35%	7.16%	3.62%	11.25%
LSSU	54.57%	14.35%	7.59%	4.07%	2.41%	9.53%	7.48%
Elmore	69.80%	1.26%	0.65%	4.34%	0.00%	0.99%	22.95%
Morristown	66.07%	5.63%	2.93%	0.38%	7.95%	0.73%	12.98%
Stowe	66.98%	6.26%	1.93%	0.35%	8.51%	0.64%	12.26%
LSSU Subtotal	63.10%	8.30%	3.93%	1.45%	6.50%	3.22%	11.23%

Key Findings: Operational Efficiencies

While LSSU will continue to seek new ways to fulfill our core mission in the most efficient manner possible, the operational improvements we have already implemented over the past nine years mean that whatever savings/efficiencies might accrue through unification would be at the margins without community support to consolidate our existing middle and high schools. It was within that context that the district's Regional Education District Study explored the potential savings and educational benefits that might be achieved by unifying LSSU and restructuring our schools (See Appendix C) After weighing the educational, operational, cultural, and operational costs and benefits, that study determined that forming a regional education district was not advisable.

Summary Conclusions and Recommendations for Action – Operational Efficiency

Our analysis shows that both districts deliver education at a spending level less than the state average, making our supervisory union a low-cost educational leader in Vermont. In addition, we believe that by maintaining two districts, we are better suited to learn from each other. We assert that education solutions are better identified and implemented when educational leaders have more with which to subsets to work.

Looking ahead, Lamoille South's investment in new accounting software is providing additional tools for us to ensure cost efficiencies and transparency across both districts. With a fully integrated financial management system in place for January 1, 2018, we will be able to quickly and easily: produce financial statements in conformity with individual, state and federal guidelines, access detailed fund and budget information in a timely manner, increase the efficiency of planning and budgeting cycles, better analyze spending reports and identify areas where supplies or services are needed or where contracts can be renegotiated, and streamline procurement processes.

The unification of the Elmore and Morristown School Districts represented a significant step forward in strengthening the educational programs offered our students and realized additional savings in operations the new unified district. This final self-study has afforded us another opportunity to assess our SU's current financial realities. What the evidence demonstrates is that there is no compelling financial or operational benefit to be derived through further unification of our supervisory union.

Despite the fact that educational spending per equalized pupil is comparable across our districts, merging our supervisory union still results in the tax payers of one community carrying an increased tax burden with no significant educational benefit for our students or our schools due to the different demographic trends driving each district. Therefore, we believe that maintaining our current supervisory union structure is the best way to achieve both the financial and educational goals of Act 46.

Recent history has taught us the benefit of purposeful collaboration across our supervisory union, finding new ways to share our considerable educational resources and new ways to create greater student access to educational opportunities regardless of district affiliation. In the future, we propose to:

1. Continue the newly established practice of having all board members meet to examine student performance data and review and revise LSSU's Action Plan, as well as the current practice of attending each other's district's budget meetings to build a shared understanding of opportunities for enhanced cooperation, equity of opportunity, fidelity of implementation of universal best practice, and areas where differences make sense.
2. Identify additional specific strategies for school boards to ensure a shared, collaborative focus on operational efficiencies:
 - a. Attend board meetings of sister board.
 - b. Common communications about operations and costs.
 - c. Identify additional areas of key board work where collaboration may enhance efficiency.
 - d. Review the supervisory union board structure and meeting schedule and consider options to support increased cooperation and coordination, including the possibility of having all board members on the SU board with weighted voting.

Section 5: Transparency, Accountability, and Community Engagement

Nine years of thoughtful strategic reflection concerning the operations and direction of the Lamoille South Supervisory Union and its member districts – Elmore, Morristown, and Stowe – has resulted in unprecedented levels of transparency, accountability, and community engagement. Our communities care deeply about their schools. Each phase/study led progressively to the next as board and community members joined with their educator teams to think deeply about the issues at the heart of Act 46 – student performance, educational opportunity, equity, efficiency, and governance. Throughout this process community members have passionately communicated their points of view and in the process learned a great deal about their schools.

We are not the same Supervisory Union we once were. The work we have done has opened new lines of communication, mutual understanding, cooperation, planning, and support. As our communities elected leaders, we have done all of this work together and found new ways to govern and share our expertise and resources while at the same time maintaining the requisite autonomy needed to represent and respond to the unique matrix of educational need and aspiration that defines each of the communities we serve. There is a certain appeal to streamlining governance structures, but the complexity of responding to the particular needs of individual communities in a manner that our parents, community members, and taxpayers value, sometimes demands more nuanced responses.

Where we felt unification was the best path forward for our schools and communities, we acted. Given the emerging financial and educational realities facing the Elmore School, we led the districts of Elmore and Morristown into a new and productive partnership. Much work still needs to be done to cement emerging patterns of trust and ownership among our citizens by fostering new opportunities for community involvement so essential to the long-term success of any newly merged district.

While not a “barrier” to implementing a full unification of LSSU, the ongoing work of insuring that EMUU successfully fulfills all the promises made to our citizens is an important consideration for us in thinking about what is best for our schools and communities at this time. Establishing new and effective operational, financial, and leadership structures and integrating them into every operational level of our supervisory union is a challenging and labor-intensive process for our administrative team.

The more important question we faced in considering a move towards full unification in our region was establishing a clear and decisive picture of the educational and financial benefits that might be derived from such a proposal – a change in structure that our citizens would conclude was necessary and in the best interest of their children. Having wrested as many operational savings as possible at both the district and supervisory union level as result of implementing the recommendations of previous operational studies, we examined deeply the costs and benefits of consolidating the middle and high schools in LSSU through a full unification of our districts. Among the obstacles to restructuring our middle and high schools was:

- No evidence that the wholesale re-organization of two high-performing K-12 districts would lead to greater educational opportunity or improved student performance.
- The very real impact on a significant portion of our student body of longer bus rides, given the geographic size of our SU. The RED study was particularly concerned about ensuring access by all students to fully participate in after-school activities without compromising their ability to

complete their homework due to late home arrivals.

- The perceived loss of community identification with and support for their schools.

Our Regional Education District Study (*see Appendix C*), after considering the myriad range of educational, cultural, and operational tradeoffs that would attend restructuring our middle and high schools, concluded that fostering greater educational collaboration throughout our supervisory union, finding new ways to share our considerable educational resources, and creating greater student access to unique programming offered across our districts was the best way to create greater educational opportunity and strengthen student performance in our S.U.

It was a decision that was arrived at thoughtfully and mindfully – a decision that not only acknowledged and celebrated the existing quality of our schools, but asserted the view that maintaining our schools’ educational and cultural integrity was the best path forward to insure every student in our region has an equal opportunity to receive a quality education both now and in the future. Reflected throughout this report are the concrete steps we have taken, and intend to take, to fulfill that collaborative vision.

Finally, in the course of this process we have reached out to other communities and districts in our region to assess the potential benefits of greater collaboration and potentially unification, particularly the Wolcott School District which tuitions many of their middle and high school students to our schools. In preparation for these discussions, LSSU examined the capacity of both EMMU and Stowe to handle Wolcott’s student population, as well as, the financial/tax consequences of Wolcott merging with either district. (*See Appendix L*) As a result of those discussions, Wolcott determined that it was not ready to change its current operating structure by ceasing to tuition its middle and high school students throughout the region. While the Stowe School District does not have the capacity to educate Wolcott students in its current facility, LSSU remains open to further discussions concerning unification should the Wolcott School district decide to revisit the issue.

Key Findings – Transparency, Accountability, and Community Engagement:

EMUU and Stowe are not “siloes” educational governance structures intent on simply focusing on their own needs or exercising their local prerogatives. Nine years of joint study and communication have:

1. Enhanced board knowledge of all our schools and the children they serve.
2. Established new patterns of PreK-12 strategic thinking and planning across our supervisory union.
3. Provided new opportunities to learn from each other’s unique practices and apply the best innovative ideas across our schools.
4. Led to the creation of coordinated policies, goals and initiatives aimed at:
 - a. The effective coordination and implementation of targeted instructional improvement plans.
 - b. The alignment of instructional and social-emotional support programs across the S.U.
 - c. The institution of student information system and data management tools enabling our principals and teachers to more effectively use individual and aggregate student data to identify student needs, allocate and share resources, and improve instruction.
 - d. A unified program of educator recruitment, support, and professional development.

5. Resulted in joint planning and accountability systems focused on:
 - a. A sustained emphasis on analyzing common data points across all schools, programs, and students.
 - b. Agreed upon strategic priorities at the board, administrative, and instructional levels.
 - c. The promotion of clear and transparent vertical curriculum alignment.
 - d. The communication of a clearer, more focused, more integrated picture of the work being undertaken in our schools, including yearly updates on academic progress formally presented in every community.

Summary Conclusions and Action Items - Transparency, Accountability, and Community Engagement

We recognize that there may come a time when the demographic or financial pictures change, demanding additional reconsideration of governance and operational structures. The realities we face are fluid and evolving. That is why our LSSU Action Plan is designed to ensure a systemic commitment to board and district cooperation in service to the needs of all our children.

But that sense of regional identity needs to become more deeply embedded in the educational ethos of the communities we serve - the sense that the needs of every child that attends school in LSSU is our collective responsibility, grounded in a relationship across our schools and communities that is embraced, nurtured, and celebrated. To that end, we propose to take steps to begin the work of forging a greater sense of regional community engagement in all of the schools. Among those initiatives are:

1. Developing a proposal for a joint Chinese Studies Program for middle and high school students to be planned and implemented by both districts – the first of what we hope will be a number of coordinated educational initiatives.
2. Coordinating LSSU school websites and communication strategies to strengthen the sense of shared mission and identity among the communities and families we serve.
3. Coordinating community activities across schools so that certain functions could take place in one district but serve the students and families of all our schools. (Examples: SU music concerts, art shows, open houses)
4. Celebrating examples of educational progress and student achievement throughout our SU.
5. Exploring ways to coordinate PTA/booster activities.
6. Scheduling community forums on issues of concern to all our parents and citizens to foster community input and dialogue throughout our SU.

APPENDICES

Appendix A: Introduction and Executive Summary from *Lamoille South Supervisory Union, Phase I Study of Governance Options*, by Raymond Proulx, Ed.D., (2009)

Appendix B: Excerpts from Lamoille South Supervisory Union's *Optional Educational Structures Committee Report on Optional Education Structures and Recommendation* April – December 2010

Appendix C: Recommendation from the *Lamoille South Supervisory Union Regional Education Committee Report*, May 2013

Appendix D: Excerpts from the Elmore-Morristown Unified Union Final Report and Articles of Agreement, September 1, 2015

Appendix E: Lamoille South Supervisory Union Act 46 Tax Projections as of 7/1/15

Appendix F: SSD & EMUU Elementary, Middle and High School Program Review - Fall, 2016

Appendix G: Student Assessment Data

Appendix H: Lamoille South Supervisory Union Comprehensive Plan for Continuous Improvement

Appendix I: Mission - Lamoille South Supervisory Union

Appendix J: VSAC Post Secondary Survey Results

Appendix K: Vermont High School Post-Secondary Enrollment, Persistence, and Completion Study

Appendix L: Wolcott Unification - Financial Data

Appendix M: Minutes of August 10, 2017, LSSU Meeting with Wolcott School Board

Appendix N: LSSU Geography

Appendix O: LSSU Act 46 Meeting Dates

Appendix A: Introduction and Executive Summary from *Lamoille South Supervisory Union, Phase I Study of Governance Options*, by Raymond Proulx, Ed.D., (2009)

Introduction:

The demographic, economic, and political landscapes for Vermont's schools have experienced substantial alteration over the past decade. There has been an increase in the overall population in Vermont but with a steady decline in the number of students in most of our schools. The number of full time equivalent public school students in Vermont has dropped to under 90,000 in October, 2009. The cost of fossil fuels, electricity, contracted services, transportation, health insurance premiums, paper products, technology equipment and other areas necessary for school operations have increased exponentially. In addition, school costs have also been impacted by both state and federal departments of education and legislators who have imposed numerous policy decisions, standards and accountability measures beyond what has ever been experienced in the history of Vermont education. Schools have been dealt responsibility for many services to students, families and society that go beyond academics. These initiatives have been needed and are being accepted by Vermont School Districts. At the same time, it is important to connect these areas to the agenda calling for both effectiveness and efficiency.

Finally, the current economic conditions of the United States and world create an urgency to act on all possibilities to enhance effectiveness and efficiency in every Vermont school. There is a call for new content and new ways for educating our populations of all ages. All of this requires that State public policy makers and local school boards look carefully at how the delivery of education is structured and to measure its effectiveness.

The purpose of this report is to provide base-line data and explore options that will enable the LSSU School Boards to make informed governance policy decisions that will map the future of the member schools. In addition, the content of this report will prepare LSSU board members and administrators for possible state-wide restructuring of schools that is currently being framed by the work of groups such as:

- The State Board of Education Transformation Policy Committee
- The Legislative Committee on the Financing and Effectiveness of the VT Education System for the 21st Century
- State Board of Education 2009-14 Strategic Planning Goals
- State of Vermont Department of Education
- Other State and local administration and agencies

To this end, the research will generate data specific to areas of education staffing, enrollment trends, school budgets, costs per pupil, tax impact, facility space and needs, district debt and assets, and applicable State laws impacting education governance.

If the communities of Elmore, Morrystown and Stowe desire to formally pursue union school possibilities, a comprehensive study would have to be initiated and completed in accordance with Vermont State Statutes Title 16, Sections 701 through 706, recently revised in the 2008 Legislative

Session. The contents of this report should help to inform and expedite the work of the subsequent study if pursued.

Credits:

Appreciation is extended to LSSU administrators, directors, coordinators and staff for their cooperation and assistance. All of these people were instrumental in enabling the collection of data needed to inform this study. I also want to recognize these people, along with LSSU board members, who provided key information about prior studies and reports, current conditions, work requirements and other operating procedures within the LSSU.

Recognition is also extended to the LSSU School Boards and administration for being proactive in preparing for the future of its school districts. Their commitment for sustaining quality education in the most efficient manner possible is transparent. The data collected for this brief report reveals that this work is very timely and necessary.

Executive Summary of General Findings:

Public policy decisions on how Vermont schools should be governed are very complex. There are many variables that must be considered when considering action to re-structure schools.

- First, governance of public schools must be a means to improving the quality of education for all students and not an end in itself. Governance is not a result but rather a means to greater productivity.
- Second, governance needs to consider intended and unintended consequences on communities and Vermont heritage.
- Third, the direction of governance needs to address efficiency and the wisest use of limited resources including finances, structures, technology and people. In other words, decisions regarding how to govern Vermont schools must be driven by core values and what is considered best for the entire system.
- Fourth, governance is about public policy needed for the future. Therefore, analysis of this study must explore answers to questions like:
 - How can school communities best insure quality education and learning in the face of declining enrollments and diminishing resources?
 - How can school districts maximize use of school facilities and structures?
 - What governance structure will best enable collaborative efforts among schools?
 - How can we insure equity for all learners?
 - Can school governance structures positively influence equity for students, parents, tax payers and community members?
 - How will school be most capable of prospering in a global community?
 - How can school communities reach and sustain relevance and success in technology and electronic communications?

The following 15 general findings/options are based on data and specific findings included in the full text of this report. The specific findings are detailed in Areas 1 through 12A-E. In addition, there are numerous appendices that provided foundation information. Therefore, it is important to read all of the materials provided here-in. At the same time, the following executive summary of general findings is

intended to capture the most salient points and provide the reader a quick reference point for future deliberation and decision making.

General Finding #1: Declining Student Population

The number of public school students in Vermont has steadily declined over the past decade to a point where the current number of pupils is below ninety thousand. This represents a decrease of approximately twelve thousand students in ten years. The schools within the LSSU school district have followed a similar pattern. The number of pupils in Elmore, Morristown and Stowe has decreased from approximately 1775 in 1999 to near 1625 in 2009. The number of students in these schools is anticipated to continue to decline by a little over 1% per year over the next five to six years (NESDEC Population Projection, 2009).

Whereas the student population has declined, the total census of Vermont residents has increased from about 580,000 to over 650,000 during the same period of time. The number of homes with children in school has become significantly fewer (only 15 to 20 %). School and community demographics are much different now than they were even ten to fifteen years ago. School and community relationships are shifting as the majority of our population advance to more senior status.

The decline in number of students in Vermont schools must also be measured in terms of economic impact on local communities as well as the entire State. Vermont relies heavily on cost per pupil for measuring efficiency and distributing fiscal resources. Capacity for decreasing expenditures at the same rate as the decline in the number of pupils has not happened. Therefore, the cost per pupil in almost all schools, even with multi-year averaging in the Act 68 formula, has risen at a level that has created a tremendous strain on our state-wide property tax supported system. All three schools within the LSSU District have done well in attempts to control costs and work within the Act 68 system. However, student enrollments will continue to decline over the next five years which will cause even more pressure on efforts to control per pupil costs.

General Finding #2: Structures for Delivering Education

Lake Elmore is the only school of 309 in the State of Vermont that operates a school specifically for grades 1, 2 and part of 3. The Elmore School District is one of 70 in Vermont that has a K -12 population of between 100 and 200 students. Eighty-three percent (83%) of these school districts provide education by operating elementary schools (K-5 or K-6) and have either joined a union high school district or tuition out middle and high school pupils. Elmore tuitions all but 21 of its 115 students to neighboring school districts with almost all of them attending Morristown schools.

Morristown and Stowe school districts are among 30 in Vermont that operate Pre-K through grade 12 educational programs. The range in student population for these 30 schools is from a low of 170 to a high of 3,935. The average size for these thirty schools is 880 pupils. Both Morristown and Stowe have student enrollments that are very close to this average.

Vermont Has the Following Variety of Structures for Delivery of Education in 289 School Districts:

- 16 Do Not Operate Schools and Tuition All Students
- 8 Operate Elementary School and Designate High School
- 30 Operate K -12
- 45 Operate Elementary and Tuition High School

- 109 Operate Elementary and Belong to a Union or Joint High School
- 14 Belong to a Union or Joint Elementary and Tuition High School
- 13 Do Not Operate Elementary but Belong to a Union High School
- 9 Gores or Unorganized Towns
- 28 Union High School Districts
- 8 Union Elementary School Districts
- 5 Unified Union School Districts

General Finding #3: School Facilities

The amount of space needed for schools has substantially increased in recent years. Factors that have driven the trend for expanded school space include: teaching methods, use of technology for teaching and learning, requirements for health and physical activities, amount of support services and mainstreaming special education students. The Vermont State Department of Education has established maximum numbers of square feet allowed in new construction for purposes of state aid. Elementary schools are allowed 140 square feet/pupil; middle level schools are allowed 160 square feet/pupil; and, high schools are allowed 180 square feet/pupil. This study has used these maximums for estimating space needs for each of the options. The general finding is that the current school facilities do have adequate space for the immediate future to accommodate students in any one of the options. In addition, the schools appear to have adequate space for playground, extra-curricular activities and sports to accommodate the student populations in any of the options. However, adult and student parking will most likely not be adequate at Peoples Academy if this school is to become the Union High School for the entire district. The only way that there would be adequate parking is if the school board established policies limiting or regulating student parking. Otherwise, construction for additional parking space would be needed.

This study did not include an analysis of the current design or the rate of utilization of school space. Therefore, depending on future direction, a more thorough analysis of use and adequacy of space such as science labs, gymnasiums, lunch rooms and the like will have to be done. This more extensive analysis would also have to include a study of “minimum space requirements outlined in Vermont’s School Quality Standards” (See Appendix 5).

General Finding #4: Current Spending Per Pupil and Cost Drivers

The school board members and administration for all three school districts within the LSSU should take pride in their efforts to control the cost of operating their schools. All three schools have lower than average current expenses per pupil when compared to other schools that have similar enrollments and the same structure for delivering education (See Areas 4 and 5 for specific findings). However, both Morristown and Stowe exceed the average cost per pupil for the State of Vermont which is \$13,395/pupil.

Budget trends for Elmore, Morristown and Stowe School Districts reveal that there are three primary variables that drive costs. First, student to teacher and student to total staff ratios are significant drivers impacting cost per pupil. It is important to preface any comparison of ratios of students to teachers in Vermont to the fact that this State ranks in the top ten among all school districts in the Nation for having very low ratios.

Lake Elmore is a classic example of how ratios impact spending. The Lake Elmore School has a student to teacher ratio of 21 to 1 compared to the State average of 11.2 to 1. In addition, Elmore receives principal’s services via the LSSU Central Office administration while all other comparative

schools employed principals and administrative support staff. Lake Elmore does not operate a school lunch program and does not have staffing for extra-curricular programs. Therefore, Lake Elmore has the highest ratio of students to staff of any schools in this study and in turn has the lowest cost per pupil among these same comparative schools.

Morristown and Stowe also have slightly higher than average student to teacher ratios recorded as 12.50:1 and 12.53:1 respectively. Ratios for number of students to administrative staff and other service areas are at par with the comparative schools.

Second, staff salaries and benefits are variable impacting cost per pupil. Elmore and Stowe both have teacher salaries that are above the average for Vermont School Districts. Elmore's average salary is approximately \$2,000 higher than State average and Stowe's salaries are approximately \$6,810 above average. Morristown's average teacher salary is approximately \$2,597 below that of the state-wide teacher average salary. This impact of salaries on overall expenses can be seen when one considers that Morristown and Stowe have approximately equal student to teacher ratios. Yet, Morristown's average current spending per pupil was \$10,920/pupil compared to Stowe at \$12,474/pupil.

Third, expenses for special education impact budget cost per pupil. FY 2009 special education budget costs per school enrollment were:

- Elmore's special education costs were \$3,275 per pupil and 22.33% of total budget.
- Morristown's special education costs were \$2,341 per pupil and 18.17% of total budget.
- Stowe's special education costs were \$1,267 per pupil and 9.06% of its total budget.

These factors are particularly important when looking at projected expenses. It is apparent that costs for special education may be one of the reasons for Elmore's estimated high cost per pupil over the next few years. It is important to note that special education costs are offset by State funds at approximately 59% and therefore the impact on local costs are minimized. Never-the-less, these variables are significant when looking at total budget costs per pupil by school and State-wide.

General Finding #5: Master Contracts

Comparison of master teacher contracts reveal that there are major differences that will be significant challenges in any attempts at transforming school governance structures. Area 11 of this report provides details outlining differences in teacher master agreements. Among the most important areas:

- Number of school days – 175 for Stowe and 179 for Morristown
- Number of teacher days – 182 for Stowe and 187 for Morristown
- Pay for extracurricular activities and sports need to be reconciled
- Average salary for Stowe is \$54,900 compared to \$45,493 for Morristown

Changes in general language and working conditions in the two contracts may be readily addressed in developing a common contract. However, days of work, salary schedules and benefits will be a challenge to reconcile in any movement towards forming union schools.

General Finding #6: Assets and Obligations

Formal procedures for merging school districts call for articulation of how the new entity will handle assets and obligations belonging to each member school district. Area 10 reveals details important to

this issue and will need to be reviewed and updated carefully when attempting any consolidation.

Some of the questions that these data suggest are:

- Will long term debts, such as Morristown's obligation for a construction loan currently at \$2,605,000, be assumed by the new entity?
- How will material assets for building and equipment be determined? Will you use insurance values, depreciated audited values, current market values or other determinations? For example, Stowe's depreciated values for school buildings total \$7,616,083 but the insurance replacement value for these same buildings is \$23,456,900.
- How will equipment and other contents owned by each district be handled?
- How will current leases and contracts be honored?

General Finding #7: LSSU Services and Operations

Comparative data for LSSU and seven other supervisory unions with student populations between 1,400 and 1,700 reveal that this supervisory union has over a long period of time consolidated many services provided to member school districts. Evidence of these efforts include, but are not limited to, the following: common school board policies, centralized fiscal services, coordinated curriculum and education programs, planned technology, data collection and analysis, human resources services, student assessment instruments and procedures, consolidated grants and special education.

Comparative financial data reveals that these efforts have also been accomplished with a high degree of efficiency. For example:

- LSSU has the highest student to central office personnel staff ratio
- Mid-range cost per general administration
- Next to the lowest current cost per pupil for all services among these 7 supervisory unions.

It appears that both management and educational leadership services are being offered and utilized well by Elmore, Morristown and Stowe.

General Finding #8: Summary Chart of Options

Chart 1: Impact of Various Options on Costs per Pupil by District Grades K through 12:

K-12 School District	Status Quo	Elmore and Morristown Elementary Form a K-5 Union	Elmore Tuition All Students to Morristown Schools	Union Middle School of Stowe and Morristown	Union High School Of Stowe and Morristown	K-12 Unified Union School District
Elmore K-12	\$14,668	\$13,867	\$13,130	\$14,425	\$14,520	\$13,327 + \$350 = \$13,677
Morristown K-12	\$12,757	\$12,637	\$13,038	\$12,979	\$12,855	\$13,327
Stowe K-12	\$13,985	\$13,985	\$13,985	\$13,679	\$13,657	\$13,327

General Finding #9: Elmore and Morristown K-5 Union

If Elmore and Morristown were to form a K-5 Union Elementary School it would have to be formed in accordance with Title 16, Section 701 through 721. There would be one school board proportioned in accordance with a census of community populations. The school would be governed by this board and there would be a single budget. This budget would be voted on by the two communities and the ballots would be co-mingled. There would also be one cost per pupil and all operations would be under the direction of this union school board. This option, if a stand alone initiative, would add one school board to the mix (from 4 to 5). Elmore would still have a school board for tuition students in grades 6 through 12 and would have to meet at least once a year to attend to responsibilities. There would be a new Elmore-Morristown Elementary Board for grades K -5. The current Morristown school board would then be responsible for grades 6 – 12 but would not be responsible for grades K through 5.

This option would avail the Lake Elmore student population with a wider array of school programs and services provided for by specialized staff. The number of teachers and staff needed would be increased by 1 FTE in order to provide the needed aides to individual students. The current cost per pupil for 375 Morristown elementary students is \$11,031. The Union cost per pupil is estimated at \$10,859 or a reduction of Morristown of \$172/pupil.

Calculating Elmore projected costs is much more complex because of the variables that need to be considered for addressing grades 6 through 12, special education and maintaining the Lake Elmore facility. Details for these estimates are on pages 29 and 30 of this report. The cost per pupil for the Union would be the same (\$10,859/pupil) for both Elmore and Morristown. However, the cost for Elmore students in grades 6 -12 coupled with expenses for other variables included in this option would result in a cost per pupil of \$16,438 for the 62 upper grade students. The net result for Elmore would be a K – 12 cost per pupil of \$13,867 which is \$801 less than present.

In conclusion, formation of an Elmore and Morristown Union Elementary School District has potential for offering more opportunities to 21 Lake Elmore students and does result in slightly lower costs per pupil for both school districts. This option increases the number of school boards in the LSSU and would result in major alterations to the Morristown governance structure. Elmore would gain governance regarding the education of K – 5 elementary students currently being educated via tuition.

General Finding #10: Tuition All K-5 Elmore Students to Morristown Elementary

The number of school boards within the LSSU would remain 4 in this option. However, the Elmore School Board would no longer operate the Lake Elmore School. The present Morristown School board would continue to have sole governance responsibilities for K -12 school operations. Estimated staffing and other related budget costs would be the same as outlined in the Elmore-Morristown Elementary School Union option. However, Morristown would now charge an allowable tuition rate rather than to share all costs per pupil equally. Both Elmore and Morristown would have variables to consider in calculating costs that are different from the Union School calculations. These new calculations would result in elementary costs per pupil for Morristown of \$11,438. Elmore's elementary cost per pupil would be \$11,829 or about \$1,000 more than under the Union alternative. Morristown's cost per elementary student would increase by \$407 over current rate.

If this option were exercised it is anticipated that Elmore's cost per pupil for K-12 would be \$13,130 rather than the current rate of \$14,668. Morristown's K-12 cost per pupil would increase from \$12,757 to \$13,038.

General Finding #11: Formation of a Union Middle School for Morristown/Elmore and Stowe

If this option were to be implemented as a stand alone initiative it would add an additional school board to the present LSSU governance structure. In turn, it would require substantial alterations in the operations of the current Morristown, Stowe and Elmore school boards who would retain responsibility for K-5 and 9-12 education. Continuity for K -12 governance would be a major concern.

The staffing pattern proposed in this option assumes that all current subjects and programs offered by either school would be available to all students. Staffing also assumes the guidelines for ratios of students to specials provided by the Vermont Quality Standards. The number of core subject classroom teachers would be reduced by 3 in accordance with the 24 to 1 D.O.E. suggested ratio. The number of special subjects teachers would be decreased in some areas and increased in others in order to meet State standards. The net result is to add .12 teachers over the current combined staffing for the two Middle Schools.

There is currently one principal for each school. The proposed administrative services are to reduce the number of principals to one and add an assistant principal. There would be a net decrease in salary and benefits but the same number of administrative staff.

The total number of combined school staff would be reduced from 62.92 FTE's to 58.50 FTE's. Opportunities for formal extracurricular activities would be decreased because the merged school would have to follow Head Master's Regulations. More intra-mural functions could be established but are not included in this projected budget.

A merger would require establishing a new master contract for teachers as well as other employees. This proposal is assuming no changes in salaries except for added or deleted positions. An average of current staff salaries for the two schools has been used in estimating salaries for added and deleted positions in the proposed budget.

The proposed Middle School would be housed in Stowe. The projected budget for the combined Middle Schools provides all of the courses and programs currently offered in both schools. For example, the PAML has a heavier emphasis on technology than Stowe. On the other hand, Stowe has a heavier focus on foreign languages. The proposed budget offers all 396 pupils access to these programs. Therefore, the number of classroom teachers has been reduced by 3. However, 3.12 special subjects teaching positions have been added to cover needs for additional technology and foreign languages. The number of teacher aides has been reduced by 4.86 in order to do away with duplicated workloads. The aides that remain are to cover classroom work, aides to individual students and special assignments.

The office of the principal is proposed to have one principal and one assistant principal. This maintains the same number of administrators. However, there is a projected salary differential of \$23,100. Another significant estimated reduction is in special education services. It appears that there is duplication of services in the current separated structure. The estimates used the average cost per pupil for the current special education services in the two schools and applied this number to the projected 396 pupils.

Plant operations must include both the current Stowe Middle level budget as well as the Stowe High School budget since the combined Middle School will be taking over the entire building. The current \$318,250 cost for operating the PA Middle Level School will be combined into the High School scenario.

The estimated budget resulting from a merger of the two middle schools reveals an increase in the cost per pupil for Morristown from \$13,149 to \$13,450. Stowe's cost per pupil would be reduced from \$14,620 to \$13,450. Students from both communities would have access to additional academic areas. Formal co-curricular areas would (focus on athletics) have fewer participants because of the Headmaster Rules regarding the number of players on various teams.

General Finding #12: Formation of a 9-12 Union High School Including Morristown and Stowe as Required School Districts

The present secondary facilities in Morristown are best suited to house grades 9 through 12. The current facilities in Stowe would not provide the necessary number of square feet needed to house 558 students.

This option, if left as a stand alone, would require an additional school board. The concepts and variables that were outlined in the Union Middle School option apply here:

- All students would have access to the same courses.
- Morristown's apparent heavier emphasis on technology and Stowe's emphasis on the languages would be melded into course offerings for all students.
- There would be more cost effective implementation of specialized courses such as Advanced Placements, Advanced Chemistry, Advanced Physics, and the like.

The estimated cost per pupil for the Union High School would be \$14,233 (see page 45). This figure compares to the current cost per pupil of \$14,417 for students attending Peoples Academy and \$15,191 for secondary students attending Stowe High School. Therefore, the budget costs per pupil in both schools would result in savings.

General Finding #13: Unified Union School District

This option would require a formal study in accordance with Vermont Law, Rules and Regulations. It would require the approval of the State Board of Education and would also have to be voted on by citizens in each of the separate school districts. Those districts determined as necessary members of the Union would have to vote in the affirmative and the votes of each community would be counted separately.

Formation of a Unified Union School District would dissolve all four of the current school boards within the LSSU and cause the creation of a single governance body made up of members from each community. The number of school board members and the proportion of members from each community would be determined by the Union Study Committee in accordance with Vermont statutes and Federal Constitution calling for "one man one vote".

The new board would be responsible for the operations of all school buildings and entities within the union inclusive of Central Office. There would be one budget and a common cost per pupil across all communities. Under current law the Common Level of Appraisal for each member community would remain separate. Therefore, tax rates would vary by town even though costs per equalized pupil would be the same.

Implementing this option appears to have the most significant possibilities for ease of transition from the current governance structure to a new one. It also appears to have the greatest potential for efficiencies and effectiveness in management of the member schools. At the same time, it has the greatest impact on dissolving the footprint of current school districts and all of the traditions and rituals that make a community. The concept of community and how to honor it will have to be a topic of conversation if this potential initiative is to be pursued further.

Elmore's budget cost per pupil for all students K -12 is \$14,688. If it were to become part of the Unified Union School District its cost per pupil would be the same as Stowe's and Morristown's (\$13,327). However, under current State statutes, Elmore would lose its small school's grant that equates to \$350 per pupil. Therefore, Elmore's net would be \$13,677. This remains to be a substantial reduction in the cost per pupil of \$1,011.

Morristown would realize an increase of \$570 per pupil while Stowe would see a decrease of \$658/pupil.

Note: All of the financial estimates of gains or losses may be altered significantly depending on how employee contracts are merged and the impact on salaries and benefits. The scenarios in this study use current average salaries and current benefits to estimate future costs.

General Finding #14: Joint Contract School Districts

Vermont Law includes provisions for the formation of Joint Contract School Districts whereby two or more school districts may enter into a contract similar to a corporate agreement for operating one or more schools. Under this provision, members from local school districts are elected to the Joint Contract Board and sit on the governance board. The Joint Board employs teachers and staff, sets programs and curriculum, develops its budget and sets policy for governing the school. Community school boards are still elected by their community and school districts continue to hold annual meetings and vote their portion of the budget. This option may be of interest as an alternative to any

of the union proposals because it allows for greater flexibility in what is included in the contract, conditions of agreement and also offers greater opportunities in what is sustained at the local school district level. The Joint Contract School District appears to be somewhat easier to enter into than the formal unions. It also appears to be easier to dissolve joint contracts if the need or desire presents itself in future years.

General Finding #15: Central Office Services

Vermont State Statute allows for supervisory union school districts to contract services through other supervisory unions. There are a few supervisory unions that have contracted with others to provide professional development for its staff, carry out payroll services, assist in obtaining substitute teachers, assist in technology planning and other such services. There have also been attempts in forming “Regional Collaboration Units” for the purpose of providing centralized management services and giving students more choices in education. Appendix 11 is one sample of a regional collaboration initiative. There have been variations to the regional concept but they all have the same basic goals:

- To strengthen capacity for delivering quality management services over a wider range of schools.
- To allow schools to contract for services that best meet their needs.
- To reduce the number of supervisory unions without loss of services to local districts.
- To allow students to choose among schools to select specific courses of study.
- To provide for greater efficiency in managing schools.

Appendix B: Excerpts from Lamoille South Supervisory Union's *Optional Educational Structures Committee Report on Optional Education Structures and Recommendation* April – December 2010

I. Introduction

In the spring of 2010, Lamoille South Supervisory Union (LSSU) Superintendent Tracy Wrend, under the direction of the LSSU Board, sought 13 committee members residing in the LSSU towns of Elmore, Stowe and Morrystown with fairly diverse lives and of varying ages. It would be called the Optional Educational Structures Committee. The LSSU board asked the Committee to investigate whether the school districts within the LSSU should “alter structures, ways and means for delivering education to all pupils within the union, and if so, what alternatives does the committee recommend to the LSSU board for further consideration.” The LSSU board’s reason for initiating this process is concern about maintaining excellence in our K-12 education system at an affordable cost to the community. The board asked the committee to report back its finding by December 15, 2010.

We, the committee, are retired or working, students and teachers. We are married, single, with and without school age children, property owners and non-property owners, taxpayers and non-taxpayers who live in each of the three LSSU towns. We are regular citizens and upon joining the group had widely differing preconceptions of what we might have just been asked to do. Mostly we just didn’t know. We didn’t know many, many facts about school organization and school funding. We didn’t know what old and new laws might apply to our school system/s. We had mostly gut feelings and incomplete information.

What we did know was that we had strong opinions. It seemed likely our opinions could lead us to disagree. But, we discovered we all had a precisely similar goal. Students, teachers, parents and citizens all, we wanted the best education we can get for ourselves, our children and grandchildren.

Therefore we undertook to study improving our schools with regard to some type of consolidation of services (educational and governance). We knew this meant considering consolidating our three town’s school districts under one super school board and maybe even consolidating both our middle schools and high schools. We always held the thought that we would study anything that would preserve, or better, local educational efforts at a sustainable expense.

It turned out that all of us knew a time comes when it is not efficient to cut expenditures and, on the flip side, a time comes when you just can’t keep spending. The time comes to study and think. That time is now.

II. Process

A. Description of Process

The committee’s work followed a Phase One Governance Study[1] the LSSU board had commissioned in the fall of 2009. That study contains a wealth of information about our local schools and alternative structures. The study is available from the LSSU office and website (lamoillesouthsu.org), which is incorporated into this report in Appendix D.

The committee met on a biweekly basis from April through December. The members were as follows: Elmore – Max Cohen, JB McKinley, Kate Osborne, Susan Titterton; Morrisville – Penny Bishop, Abby Fitzgerald, Paul Griswold, Reeves Larson; Stowe – Emily Bradbury, Jeff Dacales, Olivia DeRienzo, David Jaqua. Dr. Raymond Proulx, a former superintendent, was the committee’s facilitator.

The committee’s process was as follows:

1. Learn about our local schools and their governance structures.
2. Agree upon the overall values for the three school districts, based largely upon the values that each district has already adopted.
3. Identify possible education structures the committee will evaluate and criteria to be used for the evaluation.
4. Characterize the alternatives and determine the pros and cons for each.
5. Identify the most suitable structure for further study.
6. Present the identified structure to the community and seek its thoughts.
7. Write a report to be delivered to the LSSU by December 15, 2010.

The committee meetings were open to the public and the meeting schedule and minutes were posted on the LSSU website.

Discussions about potential changes to our local schools are undoubtedly of great concern to many. One point the committee emphasizes is that our findings are advisory and not binding. We are a voluntary group trying to understand the various issues and options. Our recommendation to the LSSU board calls for further study of a particular education structure. If the LSSU board so chooses, they can elect to conduct a Phase Two study that will examine this structure in greater detail. In Phase Two the public will have an ample opportunity to participate. If the Phase Two study concludes favorably, any changes to the status quo would require a majority vote in each of the towns prior to implementation.

B. Context of Committee’s Work

Statewide there has been a call for communities to thoughtfully examine how they provide K-12 education. With 60 supervisory unions, 362 school districts, 422 governing bodies, and 393 schools spread amongst 250 towns for 92,000 pupils, the governance of public education in Vermont is complex. Recognizing that perhaps these circumstances do not best serve the interests of all Vermont’s children and residents, our political leaders’ recently enacted legislation providing new pathways to alternative school governance structures. The LSSU board is to be credited with being proactive and initiating this much needed discussion.

Each of the three LSSU towns has its own school district and school board. Both Morristown and Stowe provide a K-12 education program for their resident pupils in facilities within their respective districts, and accept tuition pupils from neighboring communities. Elmore provides grades 1-3 education at the Lake Elmore School, grades 4-6 pupils attend Morristown Elementary School and tuitions grades 7-12 pupils to other schools, including Morristown and Stowe.

The three school districts have collaborated in many areas, successfully delegating some of their responsibilities to the LSSU in order to enhance curriculum and efficiency. The LSSU is already doing many of the items called for in recently enacted legislation in Act 153 (Appendix E).

In 2009, Morristown schools had 950 pupils of which 770 were town residents. Stowe schools had 660 pupils of which 620 were town residents. Both towns receive tuition paying pupils primarily from Elmore and Wolcott. Elmore had 125 pupils, of which 21 attended the 1-3 Lake Elmore School and

the remaining attended other area schools to which Elmore pays a tuition rate. Although tax rates differ among the three towns, school spending per pupil in 2009 was remarkably similar[2], with Elmore at \$13,509, Morristown at \$12,885 and Stowe at \$13,972.

C. Values

The committee identified values that would be used to guide the assessment process. The committee studied and used the mission statements of the three school districts to agree upon a common set of values.

We value:

- The relationship between schools and the community, acknowledging that schools have a role in engaging and involving families and community members, and that strong community involvement is vital to a successful educational experience.
- Diversity among our students, families and community members and that our schools provide a sense of belonging, safety and value.
- That every student can be a successful learner given high expectations, appropriate learning opportunities, and access to resources.
- Developing the skills and dispositions in each student that are necessary to become life-long learners and contributing citizens.
- The availability of rich and diverse curricular and extra-curricular courses and activities—including music, art, athletics, and world languages—that represent a well-rounded education.
- Providing opportunities for students to develop their creativity, intellectual curiosity and communication skills in individual and collaborative settings.
- Providing opportunities in a differentiated manner that matches the particular learning styles, intelligences and needs of each student.
- Personal responsibility among students - that each student is accountable and has a shared responsibility for their own learning.
- Safe and secure school facilities, environment and infra-structure.
- Technology as an important and critical tool for the advancement of learning.
- Providing children a public education in a financially sustainable and responsible manner.

D. Assessment of Optional Structures

Subsequent to identification of these values, the committee analyzed the status quo and explored several alternative education structures. Structures studied:

1. Status quo – Three separate school districts
2. Union School Districts for middle and/or high schools
3. Joint Contract School District
4. Unified Union School District
5. Regional Education District

The committee identified the following characteristics that were used to describe the alternative structures. Characteristics used:

- Governance structure
- Schools / Facilities
- Curriculum
- Equity / access

- Special education
- Efficiency
- Extracurricular
- Parental engagement
- Transportation
- Finance and reporting
- Implication for taxpayers
- Implication for educators
- Path to implementation

The committee used the characteristics to describe each alternative structure on a common basis given the information available to it. The intent was to describe the structures, but not make any value judgments.

The committee next determined the advantages and disadvantages of each alternative. During this process we used the values we had previously identified in order to help us make our judgments.

The characteristics and pros and cons for each alternative are presented in tabular format in appendix B.

III. Discussion of Options, Recommendation and Rationale

A. Recommendation

...As a result of the Committee's process, we recommend that the LSSU board further study creation of a Regional Education District (RED) comprised Elmore, Morristown and Stowe. The committee's consensus statement is as follows:

In order to advance the communities' values and educational quality, we recommend exploration of a Regional Education District. We recommend that two scenarios for a RED be explored: 1) merging into one consolidated Middle School and one consolidated High School for the three towns, and 2) maintaining a Middle and High School in Morristown and a Middle and High school in Stowe."...

[1] Available at http://www.lamoillesouthsu.org/documents/GovernanceStudy_Phase1.pdf

[2] The figures for Morristown and Stowe are reported school budget divided by school enrollment, which includes most but not all categorical spending and tuition payments and students.

Appendix C: Recommendation from the *Lamoille South Supervisory Union Regional Education Committee Report, May 2013*

When it comes to education, the communities of Elmore, Morristown and Stowe have much in common. Each community feels that schools are the heart of the community and values and supports quality public education for their children.

In the context of a number of challenges to sustaining and growing the quality educational system that each community expects, the districts of LSSU have engaged in four years of deep study of the many options for sustaining and growing quality education in our region in the future. As an outcome of that study, we have concluded that there are two primary options: #1 continuing in the current structure or #2 forming a Regional Education District (RED) and restructuring the middle and high schools. Other models of governance consolidation do not leverage any advantages for the districts of LSSU.

There are opportunities and challenges with each option. The significance of each challenge and opportunity may be weighted differently by each community and must be considered in the context of an uncertain future. In considering the implications of the formation of a RED and restructuring the middle and high schools, the LSSU RED Committee notes the following key points:

- The strengths and scope of the increased quality and opportunity is dependent upon choices ultimately made by a RED board in the future.
- The continuum of savings is linked to the future decisions made about quality and educational opportunity.
- There are non-economic advantages to formation of a RED, most notably in the areas of staffing, scheduling and stability.
- The disadvantages and challenges to formation of a RED include the impacts on student transportation, perceptions of local control and community identity, and the impact of statewide conversations about changes in school governance.
- The challenge of significant change in and of itself is also a key variable for consideration. In the context of high performing K-12 districts, the fear of loss of quality may outweigh communities' comfort in supporting change, even if increased educational opportunities and lower costs are possible.

Given the history of success of the current systems, the history of strong community support for the current systems, and the uncertain future context of public education in Vermont **the LSSU RED committee has determined it is not advisable to form a Regional Education District at this time.**

The study process has been extremely valuable. The LSSU RED committee's work has resulted in improved opportunities for children in each of the districts of Elmore, Morristown and Stowe by highlighting systemic strengths, and areas of possible improvement, which individual School Boards and communities have considered, and in many cases addressed proactively. The study process also highlighted the benefits of the selective collaboration already in place between and among the districts of LSSU. And finally, the study provides a firm factual foundation for navigating a changing and uncertain future context for governance of public schools in Vermont. Each of the districts of LSSU is well poised to answer questions about the implications of possible changes, and capitalize on any positive opportunities that may arise in the future.

Appendix D: Excerpts from the Elmore-Morristown Unified Union Final Report and Articles of Agreement, September 1, 2015

Recommendation, September 1, 2015

The Boards of the Elmore and Morristown School Districts, following a year of community engagement and discussion, acted in April, 2015 to formally study the formation of a Unified Union. The Elmore-Morristown Unified Union study committee was formed and has completed this, the Elmore-Morristown Unified Union Study Report.

Specifically, the committee finds that overall, formation of a Unified Union District between the Districts of Elmore and Morristown strengthens quality and opportunity, promotes achievement of high standards, creates efficiencies and flexibility, provides taxpayer value, and promotes transparency and accountability. All students in Elmore and Morristown will continue to have access to a rich array of high-quality learning opportunities within an aligned PK-12 education system and all students in grades 9-12 will have access to public high school choice through Vermont's public high school choice system. All students and school systems will benefit from increased financial and programmatic stability within a larger operational structure. In time, an estimated savings of \$490,000 can be realized. Elmore will experience significant tax rate reductions. Morristown will avoid significant tax rate increases (or program cuts). A single financial and accounting system will simplify both revenue and expenditure reporting and local control will expand, as all citizens will have a voice in the education of all students, PK-12 in Elmore and Morristown.

The Elmore and Morristown School Districts have a long history of strong, productive partnerships. Each community feels that schools are the heart of the community and values and supports quality public education for their children. Based upon the strong history of collaboration, the report findings, and the thoughtful framing of the Articles of Agreement, the Elmore-Morristown Unified Union Study Committee unanimously finds that it is advisable to form a Unified Union District.

Executive Summary

Quality and Opportunity; Achievement of High Standards

- All students in Elmore and Morristown will continue to have access to a rich array of high-quality learning opportunities within an aligned PK-12 education system.
- All students in grades 9-12 will have access to public high school choice through Vermont's public high school choice system. Elmore students will no longer have publically funded choice in grades 7-8 or for independent schools.
- All students will benefit from increased stability in the available educational opportunities: (1) due to combined enrollment which supports maintenance of reasonable school sizes; (2) possibilities for program improvement/expansion if savings can be reinvested; and (3) through preventing losses of programs.
- The Elmore School cannot be closed for the first four years of the Elmore-Morristown Unified Union unless the voters of Elmore approve closure; four years is the maximum time period for this provision allowed by law. The Elmore School's future operations will benefit from financial stability within larger operational structure.

Efficiencies, Flexibility and Taxpayer Value

- With full implementation, an estimated savings of \$490,000 can be realized.
- The Elmore-Morristown Unified Union will receive a \$150,000 merger incentive grant.
- Efficiencies can be increased and the sharing of resources across schools will be facilitated with much more flexibility.
- Elmore will experience significant tax rate reductions; Morristown will avoid significant tax rate increases (or program cuts); all will benefit from increased tax rate stability.
- Elmore will contribute \$600,000 less per year in total taxes paid to the Education Fund.
- Morristown will avoid the possible impacts of the loss of \$1,200,000 in revenue.

Transparency and Accountability

- A single financial and accounting system will simplify both revenue and expenditure reporting.
- Local control will expand---all will have a voice in the education of all students, PK-12 in Elmore and Morristown.
- The Lamoille South Supervisory Union board will be comprised of seven (7) members, utilizing proportional representation, including three (3) representatives from the Stowe School District and four (4) representatives from the Elmore-Morristown Unified Union District Board, which provides for proportional representation based upon the census, promotes effective and efficient operations of the supervisory union and ensures that all continue to have a voice in supervisory union operations.
- The Elmore-Morristown Unified Union Board structure provides for representation from each community, ensuring that a broad spectrum of perspectives is represented in the governance of education systems.

Appendix E: Lamoille South Supervisory Union Act 46 Tax Projections as of 7/1/15

The five model projections include:

1. No Governance Change
2. Form an Education (Supervisory) District
3. Form an Education (Supervisory) District, less \$200,000 in expenditures
4. Do Nothing – AOE Forms Mandated Education District
5. Elmore-Morristown Unified Union (EMUU) merger study

Data and Graphs: There are 8 graphs illustrating the projected homestead tax rates as follows:

- 4 graphs that illustrate the homestead tax rate for each model
- 3 graphs that include the above comparative data for each district
- 1 graph illustrating the proposed Elmore-Morristown Unified Union merger

Key assumptions used in each of the model projections include:

A. Inflation: A nine-year actual average is used for each district as follows for:

- Elmore: 5.9%
- Morristown: 3.8%
- Stowe: 4.3%
- Average: 4.65% (for years combined as Education District)

B. Equalized Pupil Count: A nine-year actual average is used for each district as follows:

- Elmore: -1.9%
- Morristown: -1.0%
- Stowe: 1.1%
- Average: -0.63% (for years combined as Education District)

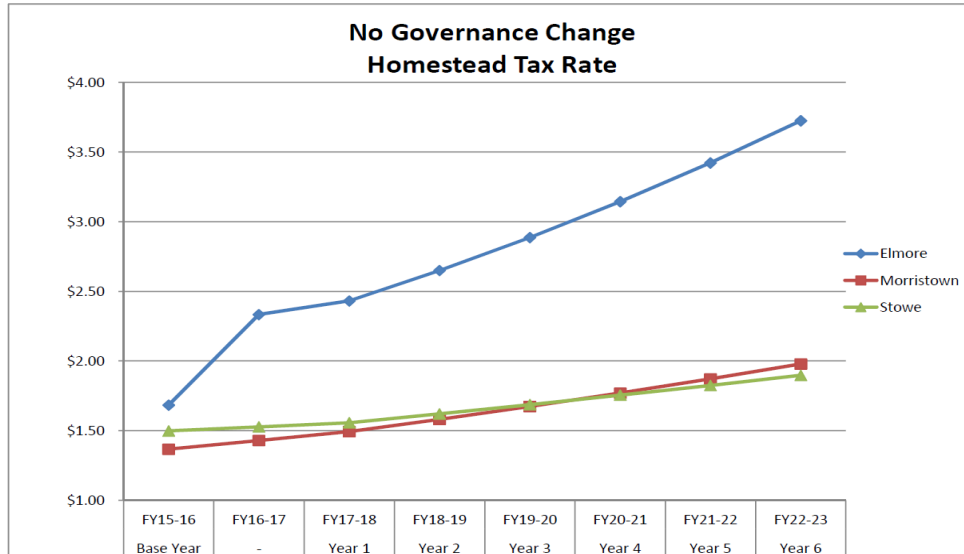
C. Base Amount: 1% increase per year

D. Homestead Tax Rate: \$0.02 increase per year

E. Common Level of Appraisal (CLA): Fixed (no change from FY15-16)

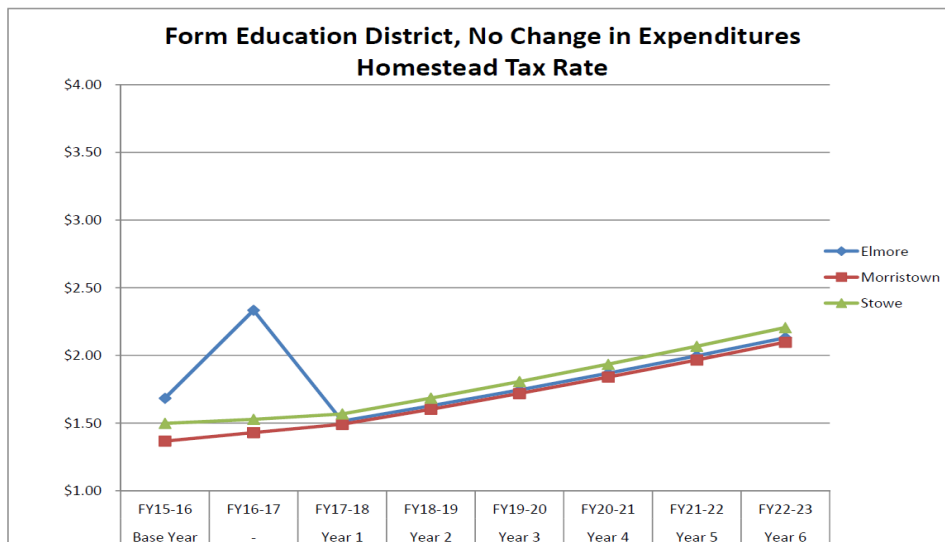
No Governance Change, ed spending inc (by District), 1% base amt inc, \$.02 tax rate inc, eq pup change (by District)

	Homestead Tax Rate							
	Base Year	-	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	FY15-16	FY16-17	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Elmore	\$ 1.68	\$ 2.33	\$ 2.43	\$ 2.65	\$ 2.89	\$ 3.14	\$ 3.42	\$ 3.72
Morristown	\$ 1.37	\$ 1.43	\$ 1.49	\$ 1.58	\$ 1.67	\$ 1.77	\$ 1.87	\$ 1.98
Stowe	\$ 1.50	\$ 1.53	\$ 1.56	\$ 1.62	\$ 1.69	\$ 1.75	\$ 1.82	\$ 1.90



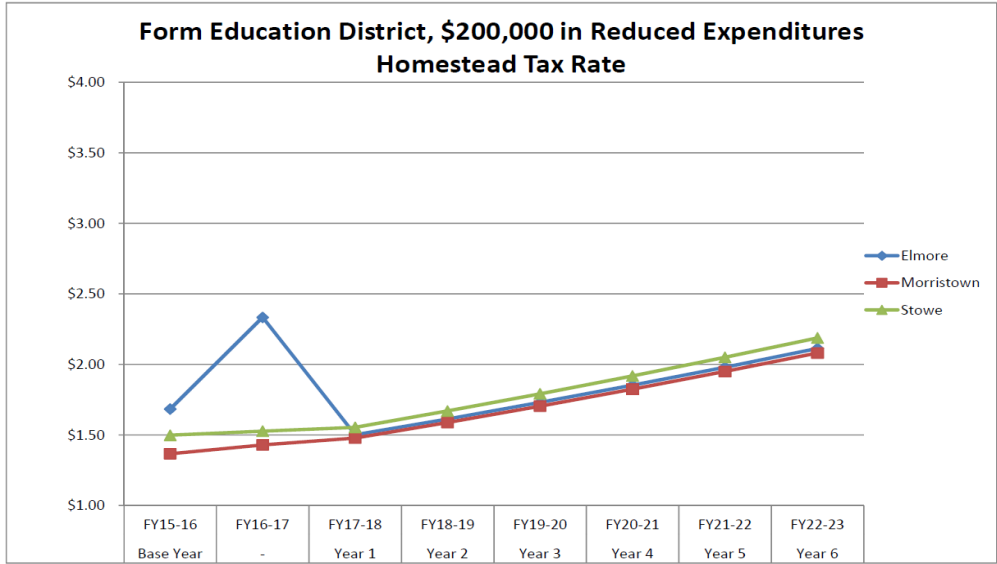
Form Ed Dist - Accelerated Option

	Homestead Tax Rate							
	Base Year	-	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	FY15-16	FY16-17	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Elmore	\$ 1.68	\$ 2.33	\$ 1.51	\$ 1.63	\$ 1.75	\$ 1.87	\$ 2.00	\$ 2.13
Morristown	\$ 1.37	\$ 1.43	\$ 1.49	\$ 1.60	\$ 1.72	\$ 1.84	\$ 1.97	\$ 2.10
Stowe	\$ 1.50	\$ 1.53	\$ 1.57	\$ 1.68	\$ 1.81	\$ 1.93	\$ 2.07	\$ 2.21



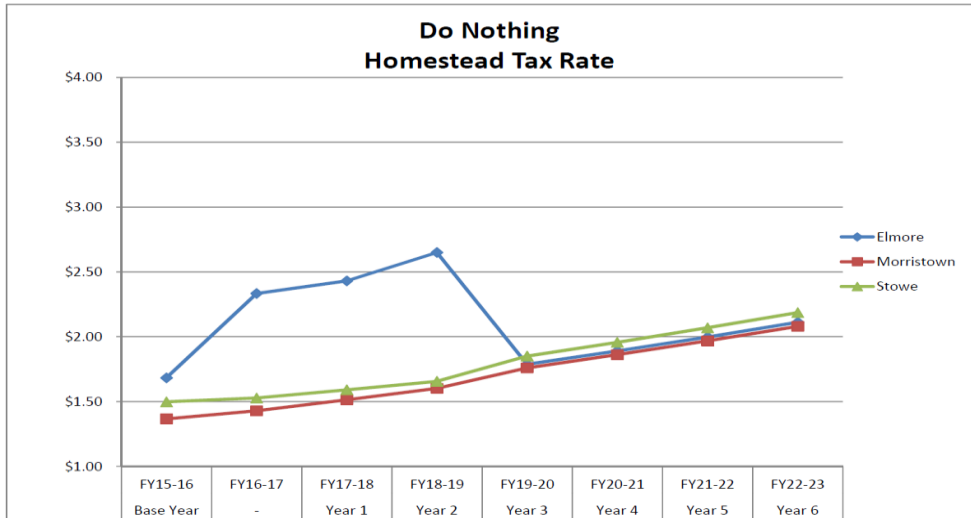
Form Ed District - Accelerated Option, less \$200k expenditures

	Homestead Tax Rate							
	Base Year FY15-16	- FY16-17	Year 1 FY17-18	Year 2 FY18-19	Year 3 FY19-20	Year 4 FY20-21	Year 5 FY21-22	Year 6 FY22-23
Elmore	\$ 1.68	\$ 2.33	\$ 1.50	\$ 1.61	\$ 1.73	\$ 1.85	\$ 1.98	\$ 2.11
Morristown	\$ 1.37	\$ 1.43	\$ 1.48	\$ 1.59	\$ 1.70	\$ 1.82	\$ 1.95	\$ 2.08
Stowe	\$ 1.50	\$ 1.53	\$ 1.55	\$ 1.67	\$ 1.79	\$ 1.92	\$ 2.05	\$ 2.19

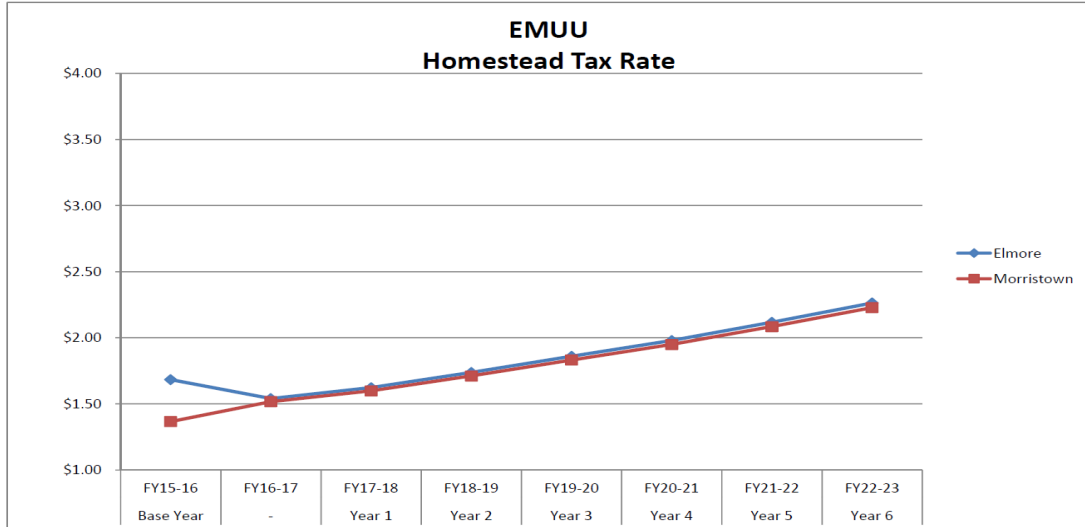


Do Nothing - Ed Dist Formed by State in 2019

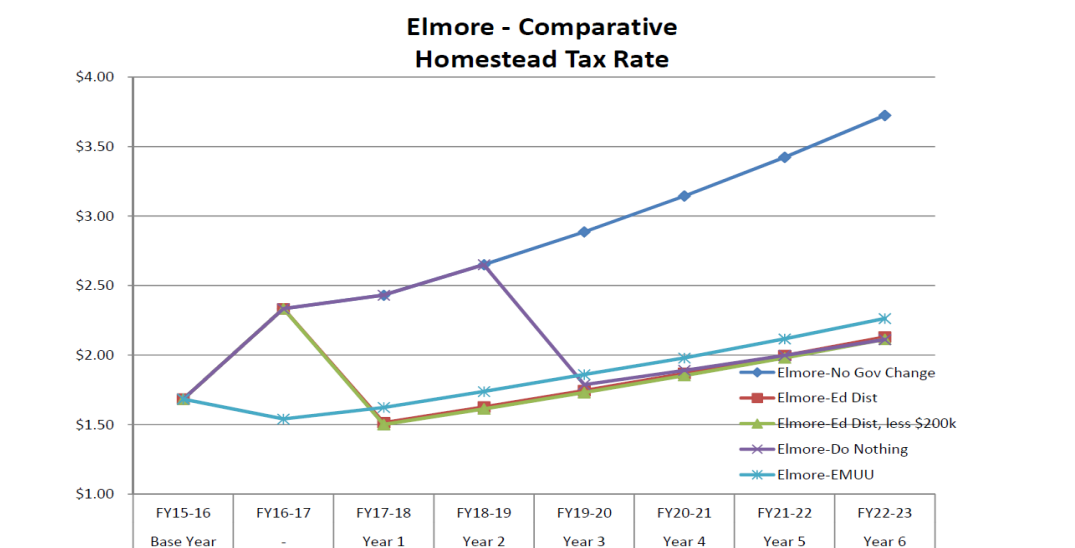
	Homestead Tax Rate							
	Base Year FY15-16	- FY16-17	Year 1 FY17-18	Year 2 FY18-19	Year 3 FY19-20	Year 4 FY20-21	Year 5 FY21-22	Year 6 FY22-23
Elmore	\$ 1.68	\$ 2.33	\$ 2.43	\$ 2.65	\$ 1.79	\$ 1.89	\$ 2.00	\$ 2.11
Morristown	\$ 1.37	\$ 1.43	\$ 1.51	\$ 1.60	\$ 1.76	\$ 1.86	\$ 1.97	\$ 2.08
Stowe	\$ 1.50	\$ 1.53	\$ 1.59	\$ 1.66	\$ 1.85	\$ 1.96	\$ 2.07	\$ 2.19



		EMUU Homestead Tax Rate							
Base Year		-		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
FY15-16		FY16-17		FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Elmore	\$ 1.68	\$ 1.54	\$ 1.62	\$ 1.74	\$ 1.86	\$ 1.98	\$ 2.12	\$ 2.26	
Morristown	\$ 1.37	\$ 1.52	\$ 1.60	\$ 1.71	\$ 1.83	\$ 1.95	\$ 2.08	\$ 2.23	

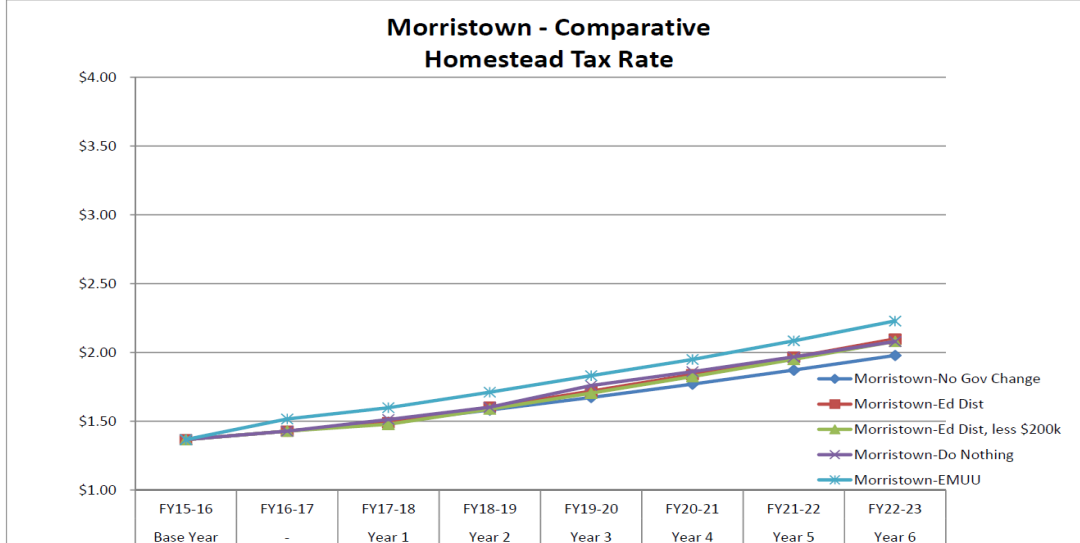


		Elmore - Comparative Homestead Tax Rate							
Base Year		-		Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
FY15-16		FY16-17		FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Elmore-No Gov Change	\$ 1.68	\$ 2.33	\$ 2.43	\$ 2.65	\$ 2.89	\$ 3.14	\$ 3.42	\$ 3.72	
Elmore-Ed Dist	\$ 1.68	\$ 2.33	\$ 1.51	\$ 1.63	\$ 1.75	\$ 1.87	\$ 2.00	\$ 2.13	
Elmore-Ed Dist, less \$200k	\$ 1.68	\$ 2.33	\$ 1.50	\$ 1.61	\$ 1.73	\$ 1.85	\$ 1.98	\$ 2.11	
Elmore-Do Nothing	\$ 1.68	\$ 2.33	\$ 2.43	\$ 2.65	\$ 1.79	\$ 1.89	\$ 2.00	\$ 2.11	
Elmore-EMUU	\$ 1.68	\$ 1.54	\$ 1.62	\$ 1.74	\$ 1.86	\$ 1.98	\$ 2.12	\$ 2.26	



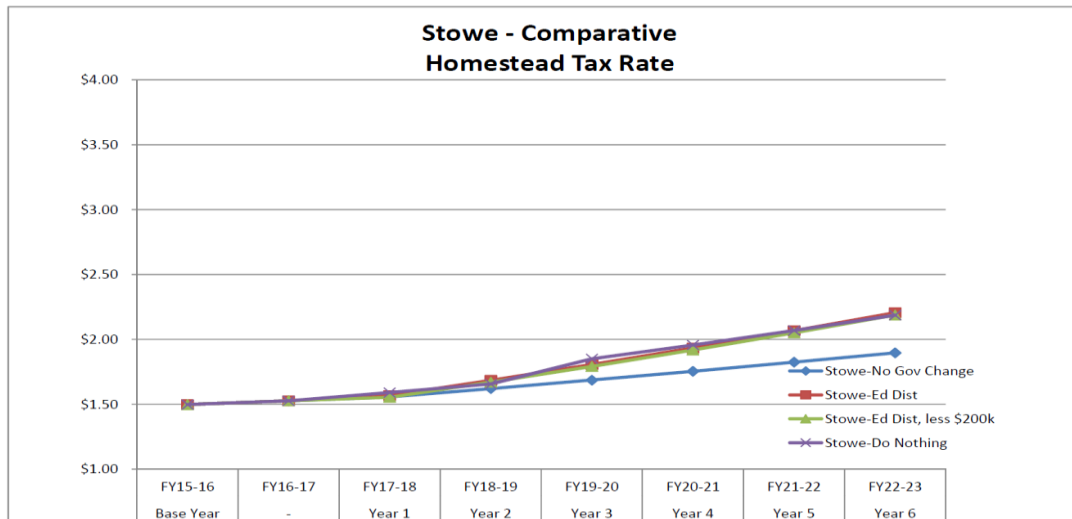
Morristown - Comparative
Homestead Tax Rate

	Base Year	-	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	FY15-16	FY16-17	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Morristown-No Gov Change	\$ 1.37	\$ 1.43	\$ 1.49	\$ 1.58	\$ 1.67	\$ 1.77	\$ 1.87	\$ 1.98
Morristown-Ed Dist	\$ 1.37	\$ 1.43	\$ 1.49	\$ 1.60	\$ 1.72	\$ 1.84	\$ 1.97	\$ 2.10
Morristown-Ed Dist, less \$200k	\$ 1.37	\$ 1.43	\$ 1.48	\$ 1.59	\$ 1.70	\$ 1.82	\$ 1.95	\$ 2.08
Morristown-Do Nothing	\$ 1.37	\$ 1.43	\$ 1.51	\$ 1.60	\$ 1.76	\$ 1.86	\$ 1.97	\$ 2.08
Morristown-EMUU	\$ 1.37	\$ 1.52	\$ 1.60	\$ 1.71	\$ 1.83	\$ 1.95	\$ 2.08	\$ 2.23



Stowe - Comparative
Homestead Tax Rate

	Base Year	-	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
	FY15-16	FY16-17	FY17-18	FY18-19	FY19-20	FY20-21	FY21-22	FY22-23
Stowe-No Gov Change	\$ 1.50	\$ 1.53	\$ 1.56	\$ 1.62	\$ 1.69	\$ 1.75	\$ 1.82	\$ 1.90
Stowe-Ed Dist	\$ 1.50	\$ 1.53	\$ 1.57	\$ 1.68	\$ 1.81	\$ 1.93	\$ 2.07	\$ 2.21
Stowe-Ed Dist, less \$200k	\$ 1.50	\$ 1.53	\$ 1.55	\$ 1.67	\$ 1.79	\$ 1.92	\$ 2.05	\$ 2.19
Stowe-Do Nothing	\$ 1.50	\$ 1.53	\$ 1.59	\$ 1.66	\$ 1.85	\$ 1.96	\$ 2.07	\$ 2.19



Appendix F: SSD & EMUU Elementary, Middle and High School Program Review - Fall, 2016

Elementary Core Class Size

	MES 2011-12			SES 2011-12			Elmore 2011-12	
	Students	Teachers	Average	Students	Teachers	Average	Students	Teachers
	K	48	3	16	39	2	19-20	
1	76	4	19	45	3	15	6	1
2	42	2	21	44	2	22	8	
3	61	3	20-21	47	2	23-24	8	
4	75	4	18-19	51	2	25-26		
5	78	4	19-20	46	2	23		
T	380	20	19	272	13	20-21	22	1

Elementary Core Class Size

	MES 2015-16			SES 2015-16			Elmore 2015-16	
	Students	Teachers	Average	Students	Teachers	Average	Students	Teachers
	K	67	4	16.8	60	3	20.0	
1	57	4	14.3	48	3	16.0	8	1
2	53	4	13.3	59	3	19.7	6	
3	50	3	16.7	63	3	21.0	5	
4	52	3	17.3	46	3	15.3		
5				67	3	22.3		
T	279	18	15.5	343	18	19.1	19	1

Total of E, MES, and SES Teachers =34

Changes: MES 5th to PAML; overall enrollment increase at SES

Notes: EMUU S/T ratio = 15.68; SSD K-4 S/T ratio = 18.4; SES K-4 enrollment 276

Specials

	2011-2012						
	MES			SES			
	Students	Teachers	Average	Students	Teachers	Average	
PE*	380	1	380	272	1	272	
Art*	380	0.6	633-634	272	0.8	340	
Enrichment	380	0		272	0.8	340	
Library*	380	1	380	272	0.8	340	
Spanish	380	0		272	1	272	
Guidance*	380	1	380	272	1	272	
Total	380	3.6	105.6	272	5.4	50.4	
			Total of MES and SES = 9				

Specials

	2015-2016					
	MES			SES		
	Students	Teachers	Average	Students	Teachers	Average
PE*	279	1	279	343	1	343
Art*	279	0.6	465	343	0.8	428.8
Techer Lead	279	1.3	214.6	343	2	171.5
Library*	279	1	279	343	0.8	428.8
Spanish	279	0	0	343	1	343
Music	279	0.8	348.75	343	1.2	285.8
Guidance*	279	1	279	343	1	343
Total	279	5.7	48.9	343	7.8	44.0

Total of MES and SES Teachers = 9

Changes: SES Enrichment became 1.0 and also includes Math Teacher Leader responsibilities; SSD restructuring of music program and increase of 1.0 FTE K-12

* = Required by Education Quality Standards

FY17 Updates: SES added 0.2 FTE librarian; MES added 1.0 Math Interventionist (Grant funded)

Middle Level Core Class Size

2011-2012						
PAML 2011-2012			SMS 2011-12			
Students	Teachers	Average	Students	Teachers	Average	
6	69	3	23	54	3	18
7	62	4	15-16	67	3	22-23
8	68	4	17	66	3	22
T	199	11	18-19	187	9	20-21

Middle Level Core Class Size

2015-2016						
PAML 2015-2016			SMS 2015-2016			
Students	Teachers	Average	Students	Teachers	Average	
5	86	4	21.5			
6	52	3	17.3	53	3	17.7
7	75	4	18.8	59	3	19.7
8	77	4	19.3	66	3	22.0
T	290	15	19.3	178	9	19.8

Changes: Move of 5th grade to Middle Level at PAML

FY17 Updates: PAML adopted 5/6 and 7/8 house structure

Specials

	PAML 2011-2012			SMS 2011-12		
	Students	Teachers	Average	Students	Teachers	Average
PE*	199	0.6	331-332	187	0.5	374
Art*	199	0.6	331-332	187	0.5	374
Info Tech	199	0.6	331-332	187	0	
FCS*	199	0.6	331-332	187	0.3	623
Spanish	199	0		187	1	187
Des&Tech*	199	0.6	331-332	187	0.6	311-312
Guidance*	199	1	199	187	0.8	233-234
Total	199	4	49.75	187	3.7	50.5
Total of PAML and SMS = 7.7						

* = Required by Education Quality Standards

	PAML 2015-2016			SMS 2015-16		
	Students	Teachers	Average	Students	Teachers	Average
PE*	204	0.6	340	178	0.5	356
Art*	204	0.6	340	178	0.6	296.7
FCS/Health	204	1	204	178	0.4	445.0
FL	204	0	0	178	1.6	111.3
Des&Tech*	204	0.6	340	178	0.6	296.7
Music	204	0.6	340	178	0.8	222.5
Techer Leader	204	1.3	156.9	178	0	0
Guidance*	204	1	204	178	1	178
Total	204	5.7	35.8	178	5.5	32.4

Changes: Elimination of Information Technology at PAML; FCS becomes Health at PAML

FY17 Updates: addition of 0.5 Math Teacher Leader at SMS

High School Class Sizes

2011-2012

	PA 2011-2012			SHS 2011-2012		
	Students	Teachers	Average	Students	Teachers	Average
English	311	3.75	82-83	239	3	79-80
Math	311	3	103-104	239	3	79-80
History	311	3	103-104	239	2.5	95-96
Science	311	3	103-104	239	3	79-80
F. Lanauge	311	2	155-156	239	2.5	95-96
Art	311	1.4	222-223	239	1.8	132-133
PE/Health	311	1.4	222-223	239	1.1	217-218
Driver's Ed	311	1	311	239	0.5	578
Advisory	311	1	311	239	1	239
Info Tech	311	1	311	239	0	
Des& Tech	311	0.4	777-778	239	0	
Buis/Acct	311	0		239	0.4	597-598
Guidance	311	2	155-156	239	1	239
Total	311	22.95	13.6	239	19.8	12.1

Total PA + SHS = 42.75

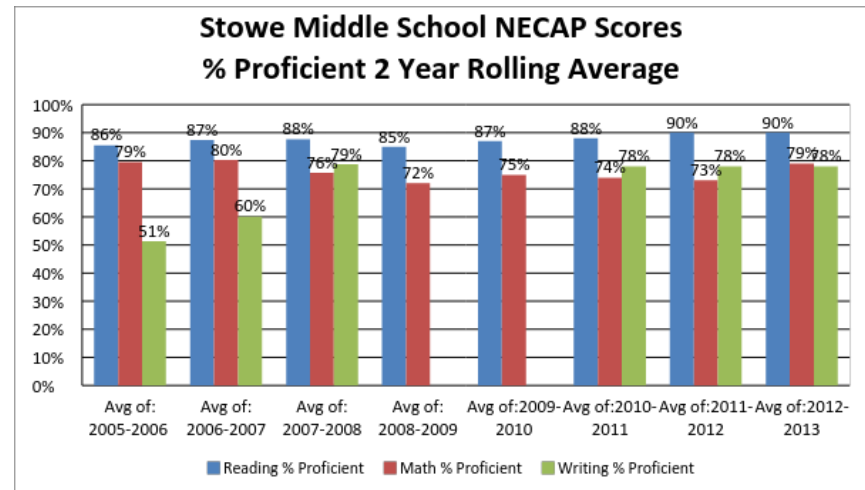
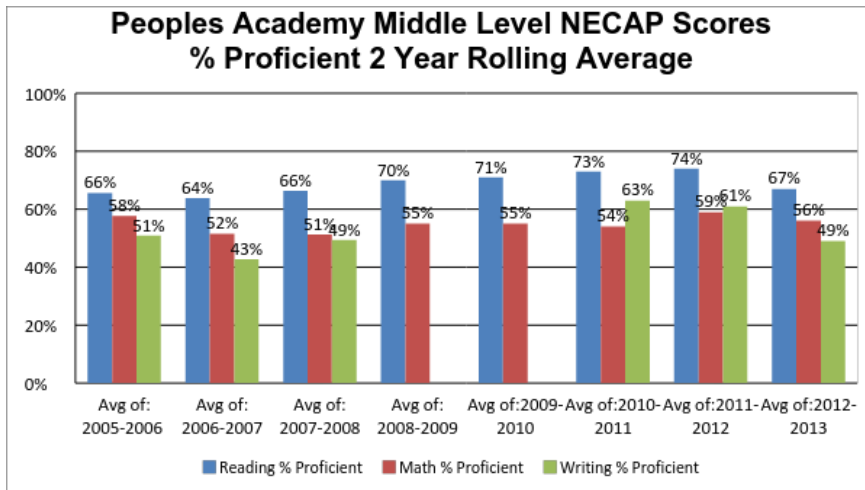
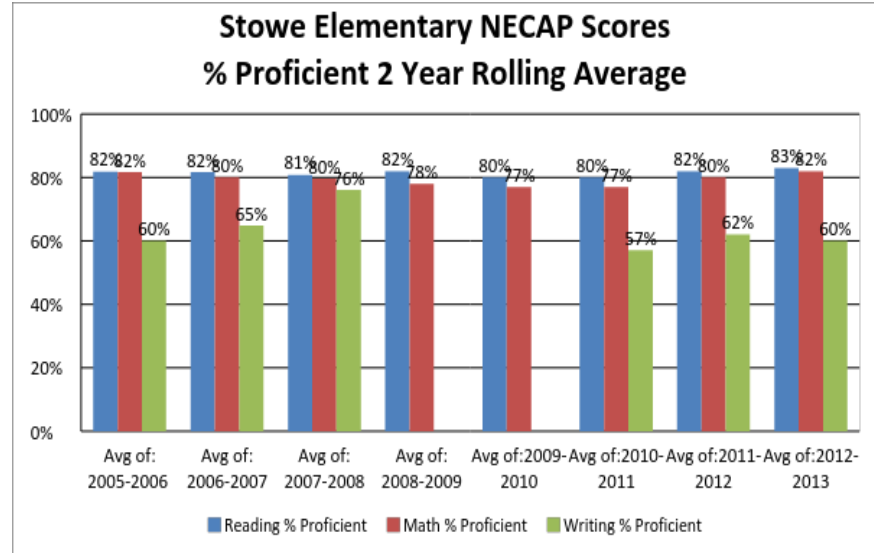
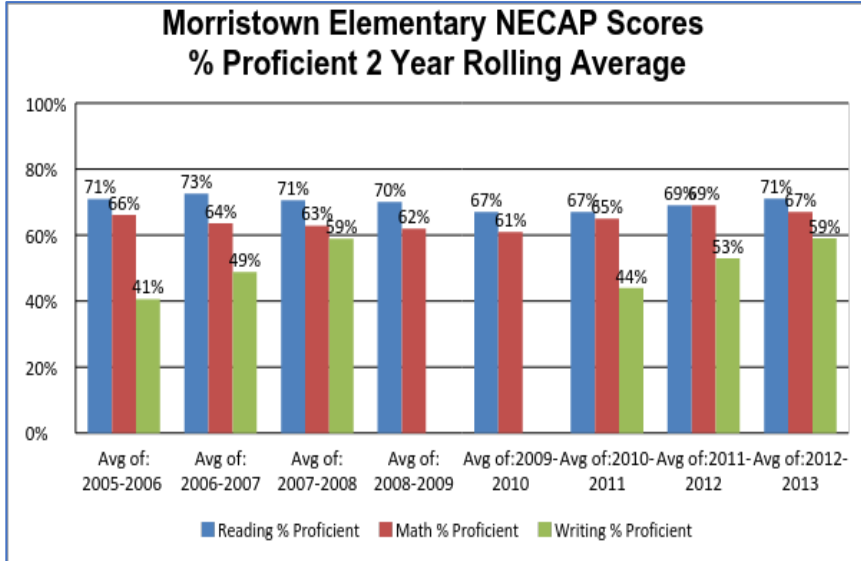
2015-2016

	PA 2015-2016			SHS 2015-2016		
	Students	Teachers	Average	Students	Teachers	Average
English	256	3.6	71.1	234	4	58.5
Math	256	3	85.3	234	3	78
History	256	3.4	75.3	234	3	78
Science	256	3	85.3	234	3	78
FL	256	2	128.0	234	2.4	97.5
Art	256	1.4	182.9	234	1.8	130
PE/Health	256	1.4	182.9	234	0.5	468.0
DE	256	1	256.0	234	0.5	468
Advisory	256	1	256.0	234	0	0
Des& Tech	256	0.4	640.0	234	0.4	585
Teacher Lead	256	0.3	853.3	234	0	0
Music	256	0.4	640.0	234	1	234
Guidance	256	2	128.0	234	1	234
Total	256	22.9	11.2	234	20.6	11.36

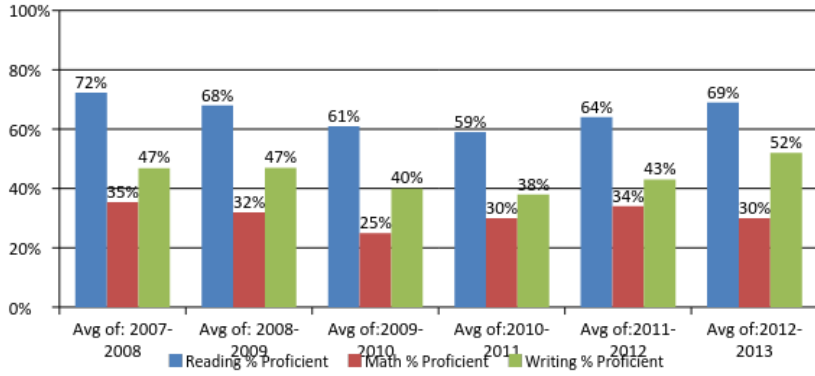
Changes: minor adjustments to English FTE at PA; Extended Day Porgram Coordinantor at PA, redeployed Advisory teacher at SHS to English based on utilization; added 0.4 FTE Design and Tech at SHS; restructured music program at SHS and added 1.0 FTE K-12; eliminated Latin Teacher at SHS
 FY17 Changes: Added 0.5 Math Teacher Leader at SHS; included Math Teacher Leader; PA and PAML have a Math Interveionist (grant funded)

Appendix G: Student Assessment Data

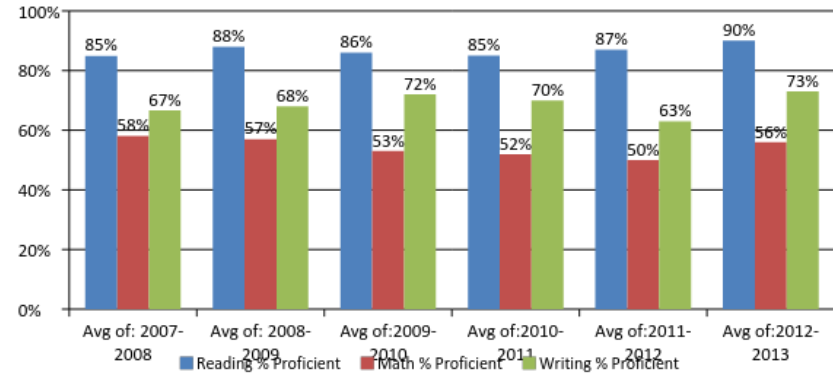
NECAP Reading, Math and Writing



**Peoples Academy High School NECAP Scores
% Proficient 2 Year Rolling Average**

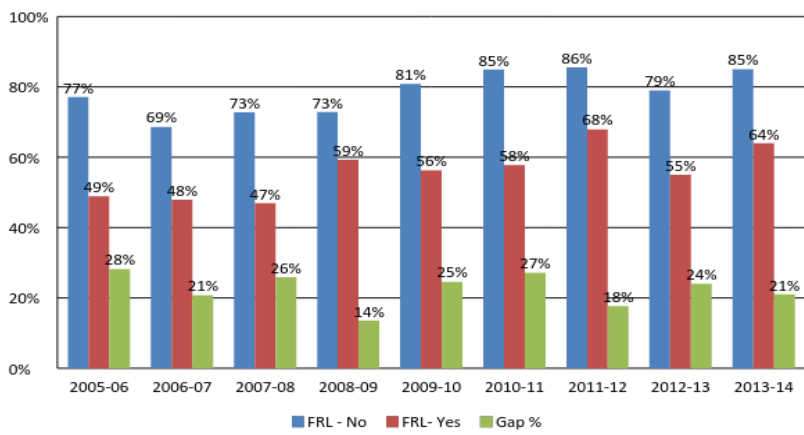


**Stowe High School NECAP Scores
% Proficient by Subject**

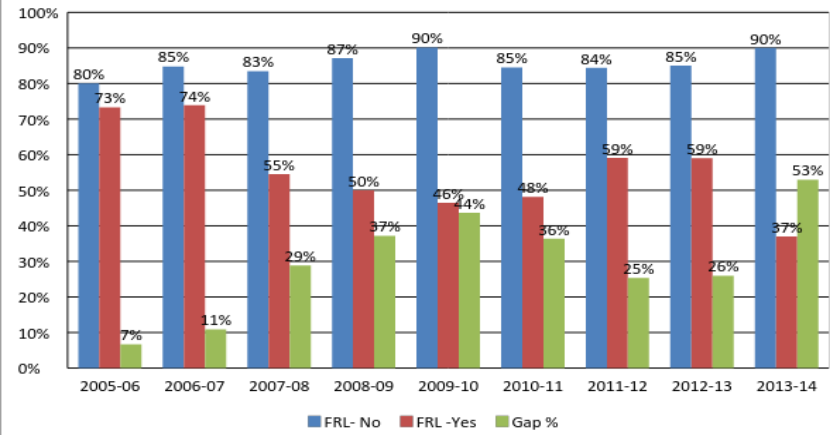


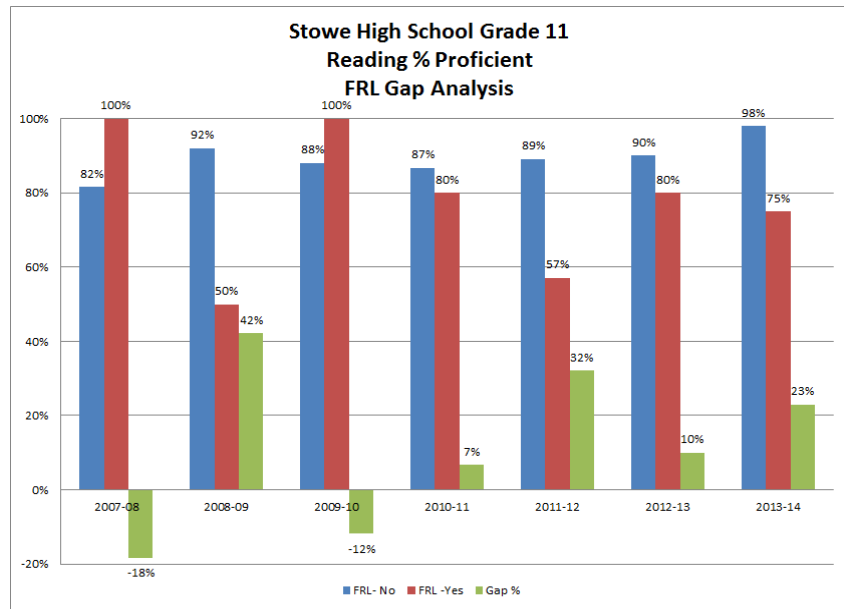
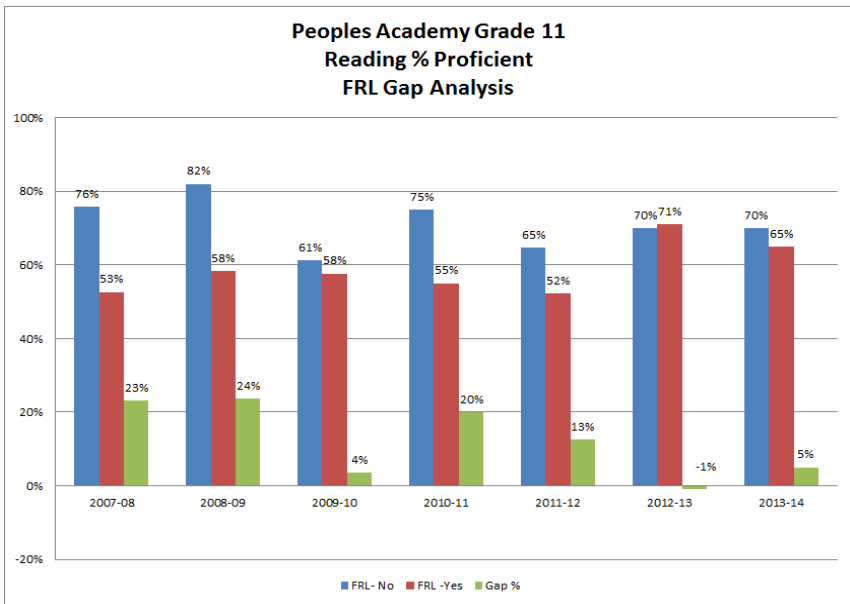
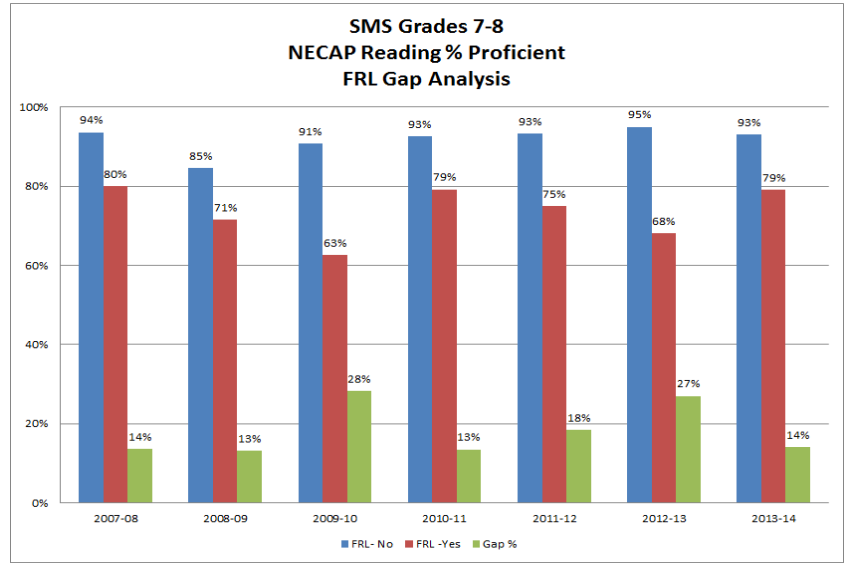
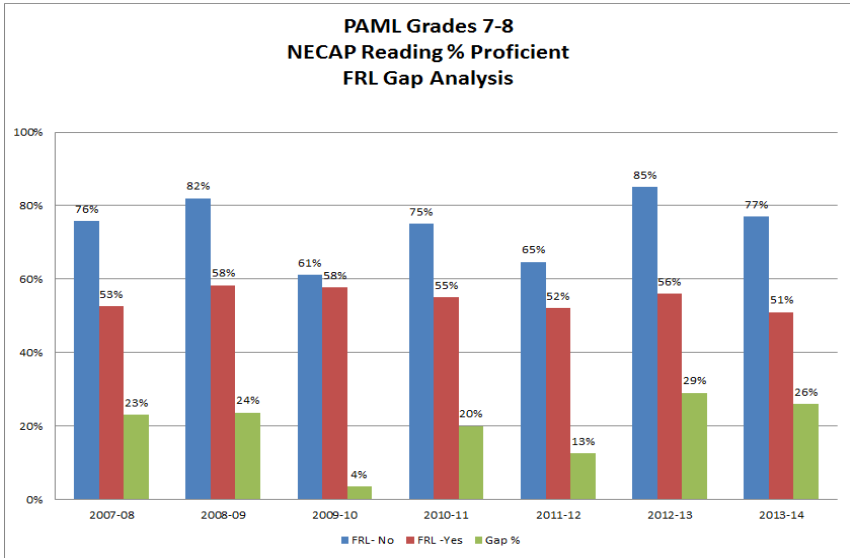
NECAP Achievement Gap Comparison – Reading

**Morristown Grades: 3-6
NECAP Reading % Proficient
FRL Gap Analysis**

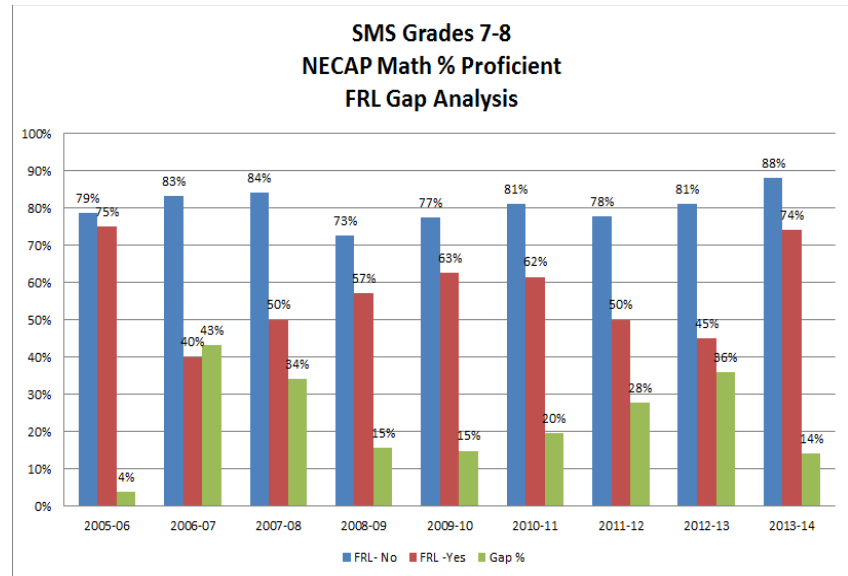
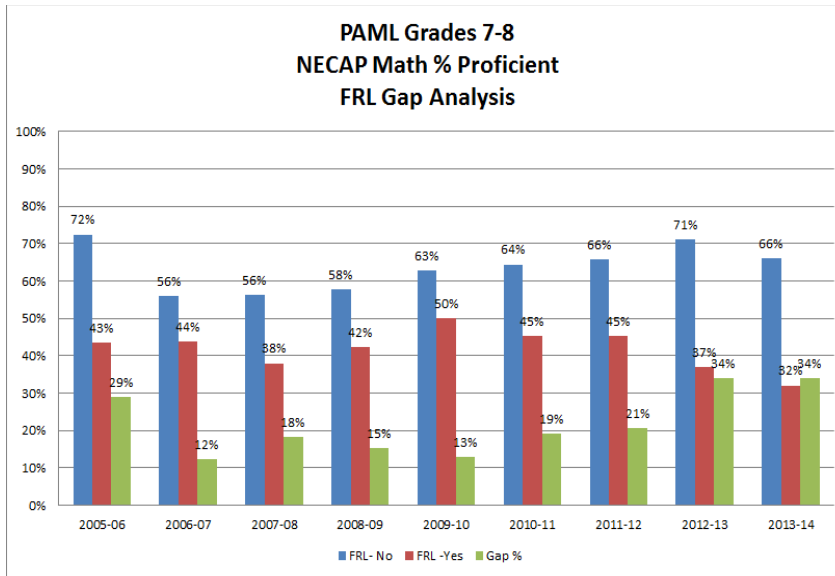
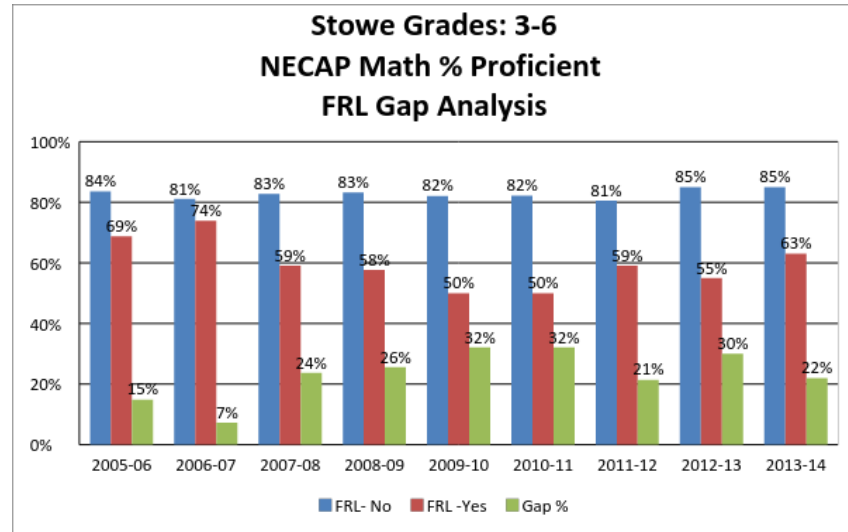
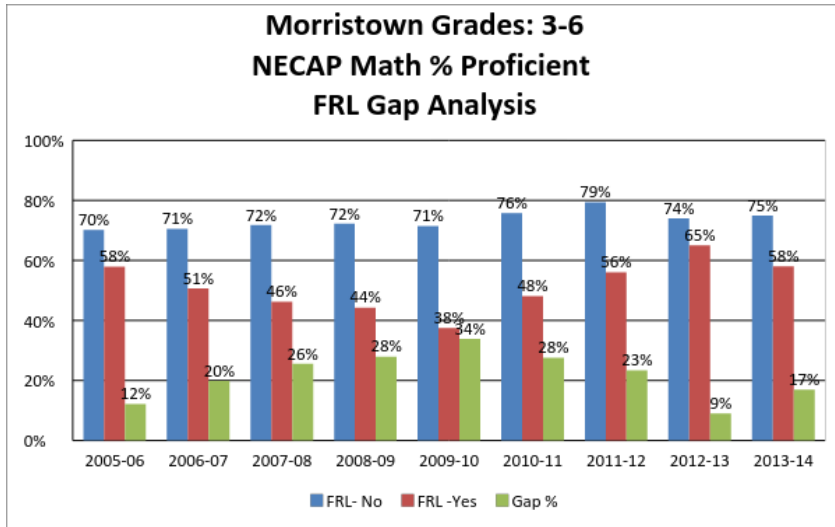


**Stowe Grades: 3-6
NECAP Reading % Proficient
FRL Gap Analysis**

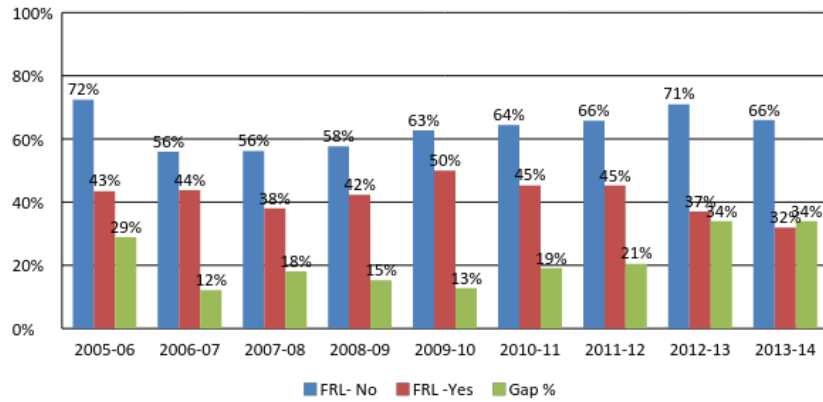




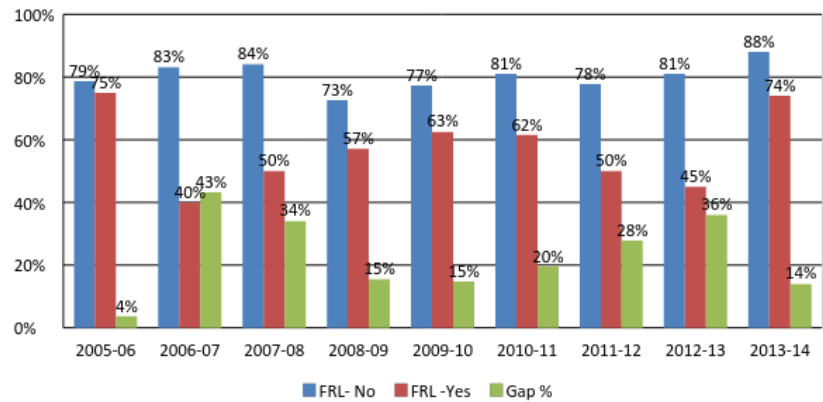
NECAP Achievement Gap Comparison – Math



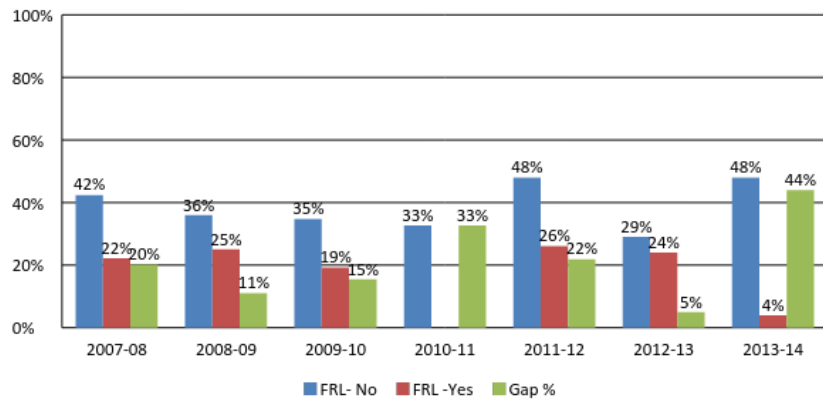
**PAML Grades 7-8
NECAP Math % Proficient
FRL Gap Analysis**



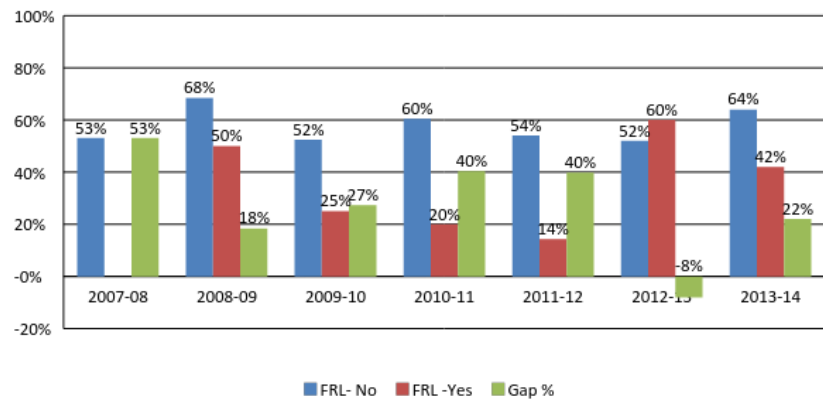
**SMS Grades 7-8
NECAP Math % Proficient
FRL Gap Analysis**



**Peoples Academy Grade 11
NECAP Math % Proficient
FRL Gap Analysis**

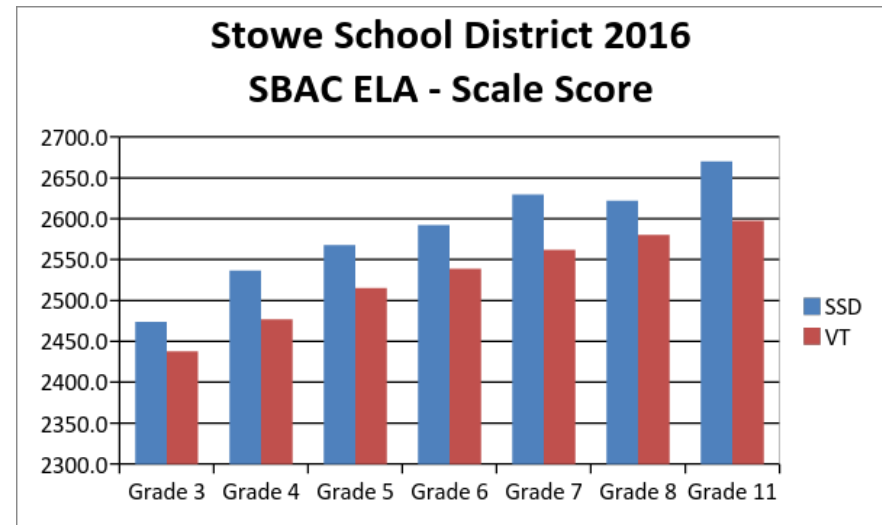
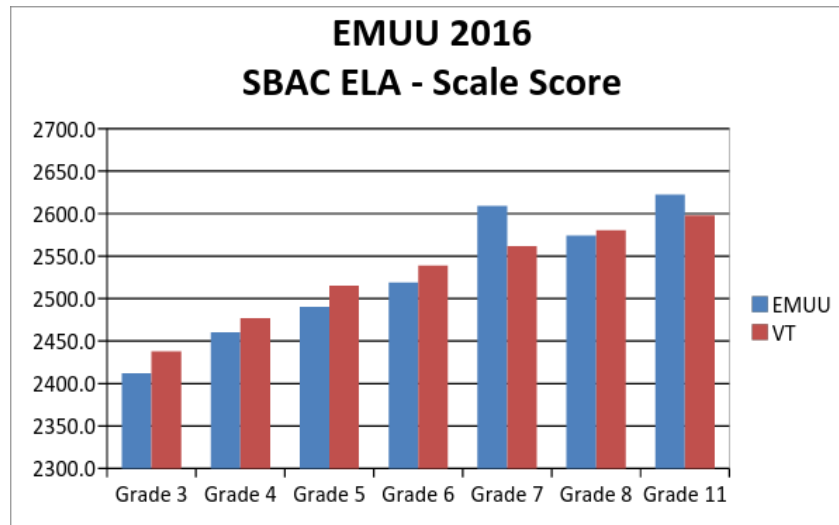
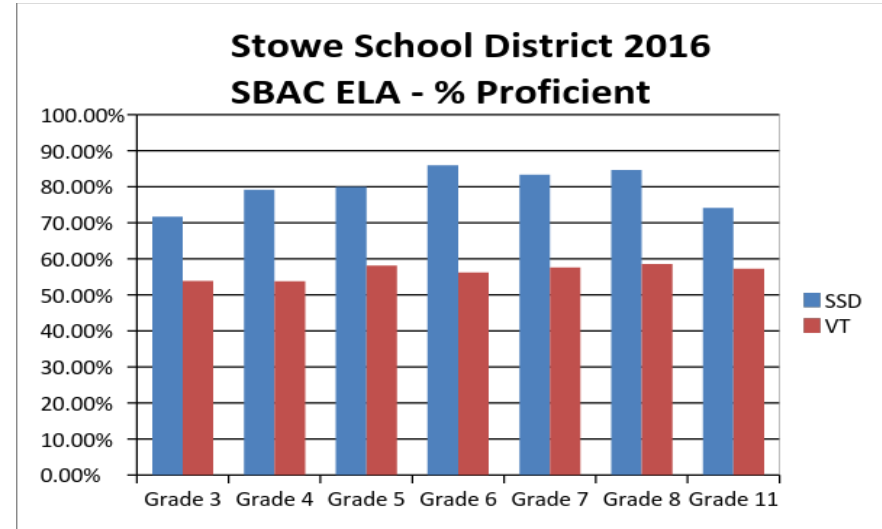
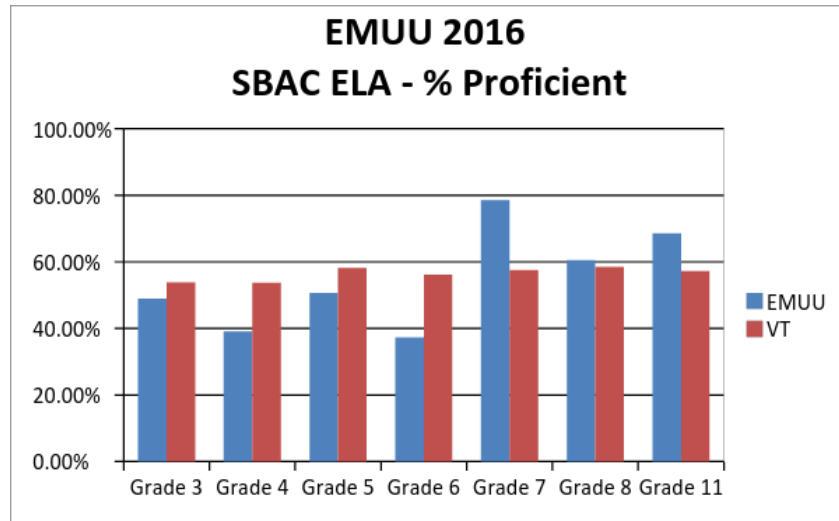


**SHS Grade 11
NECAP Math % Proficient
FRL Gap Analysis**

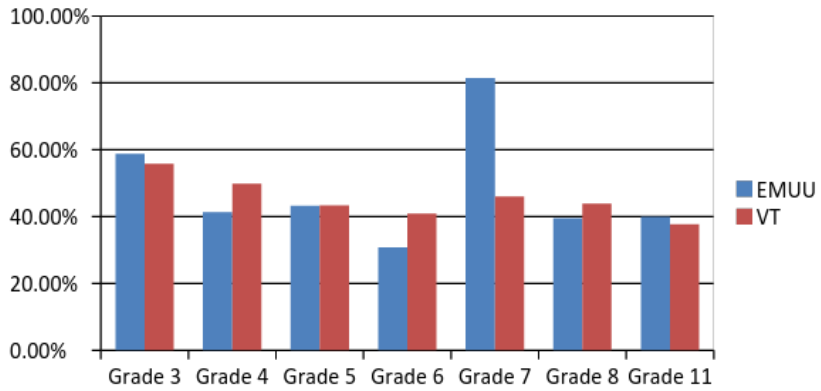


SBAC

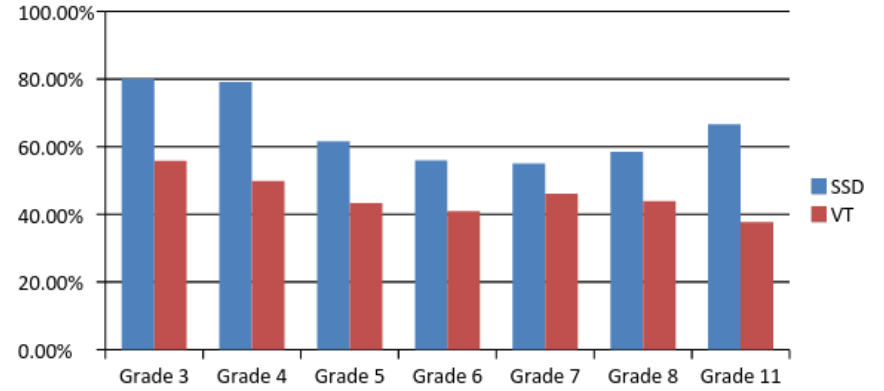
SBAC – 2016 Compared to Vermont



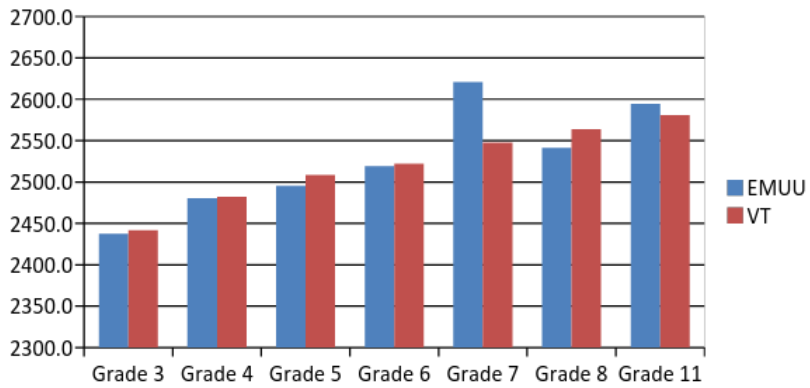
**EMUU 2016
SBAC Math - % Proficient**



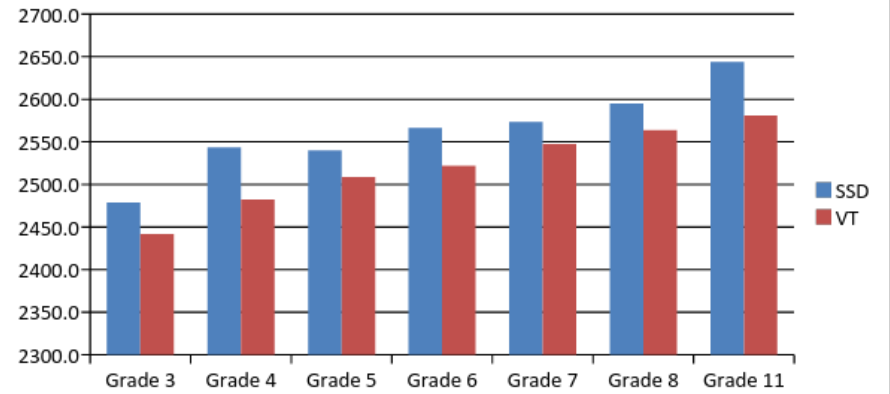
Stowe School District 2016 SBAC Math - % Proficient



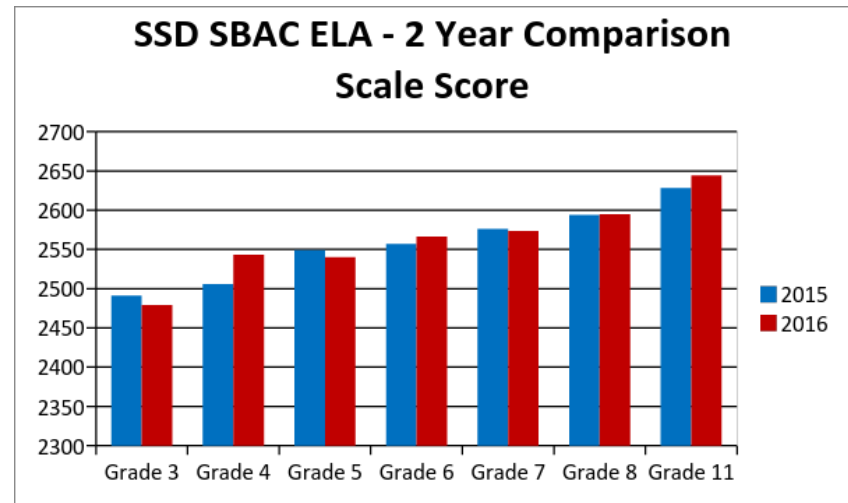
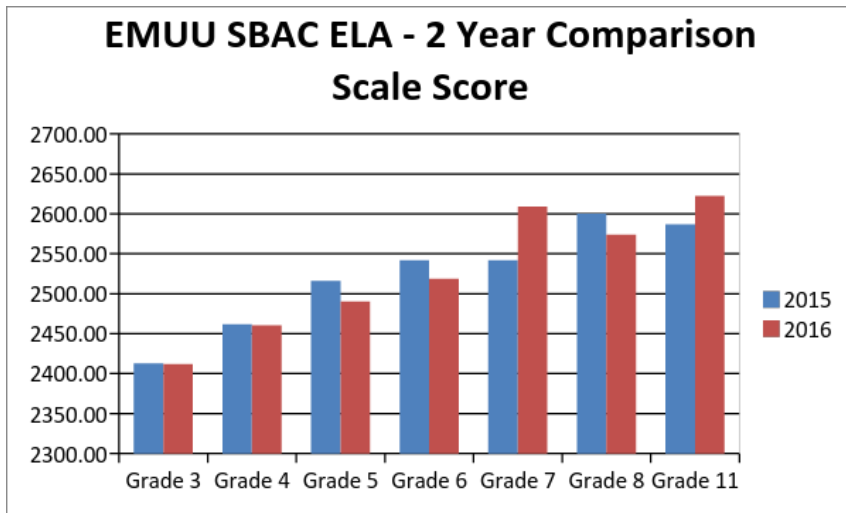
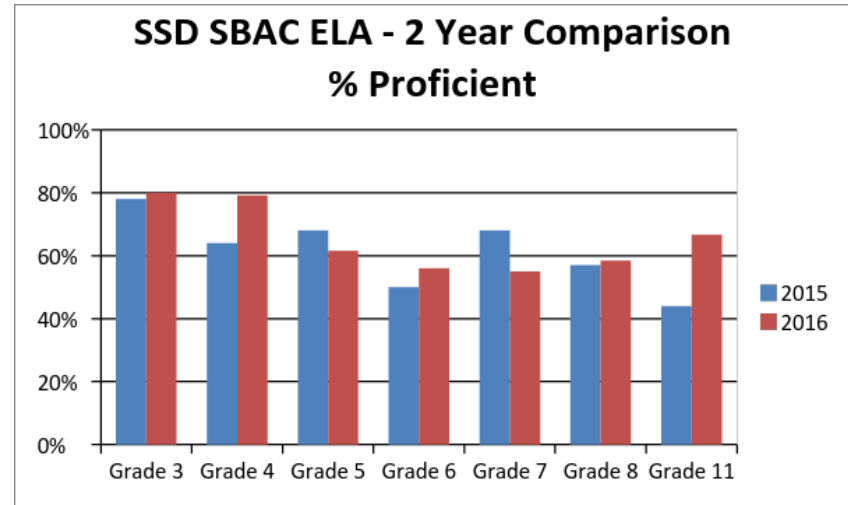
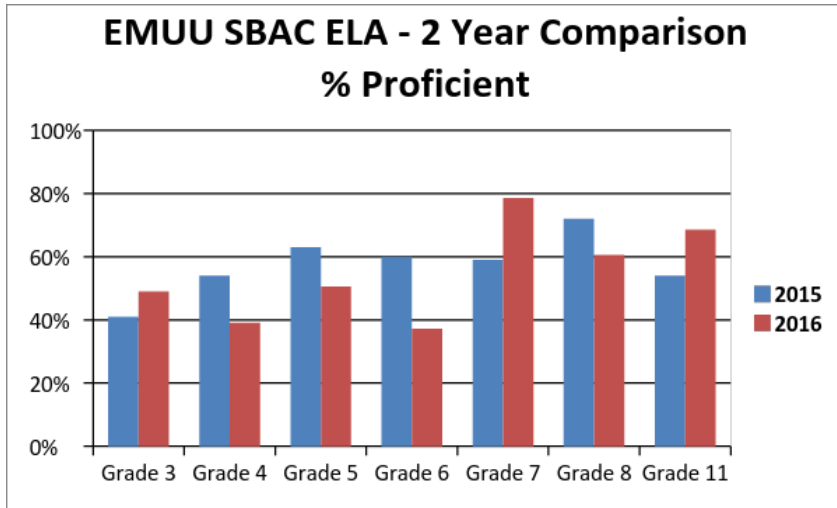
**EMUU 2016
SBAC Math - Scale Score**



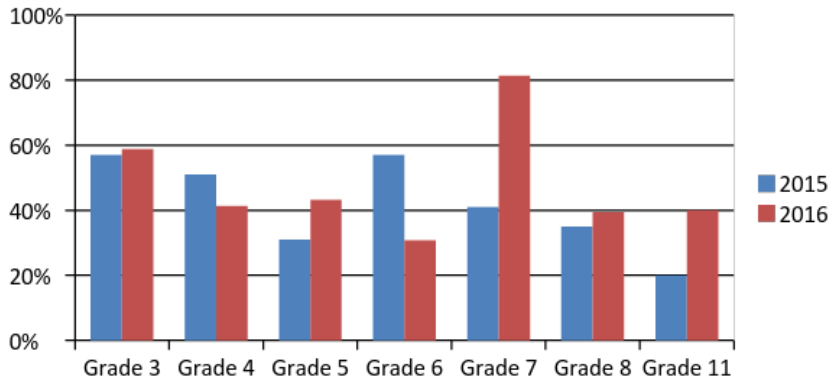
**Stowe School District 2016
SBAC Math - Scale Score**



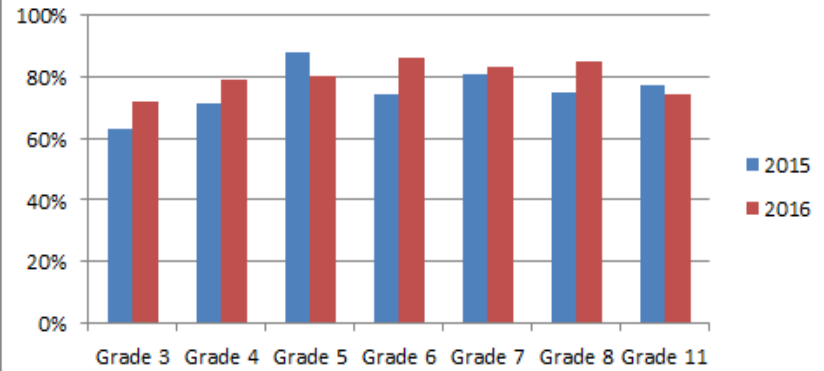
SBAC – Achievement Comparison, Year to Year



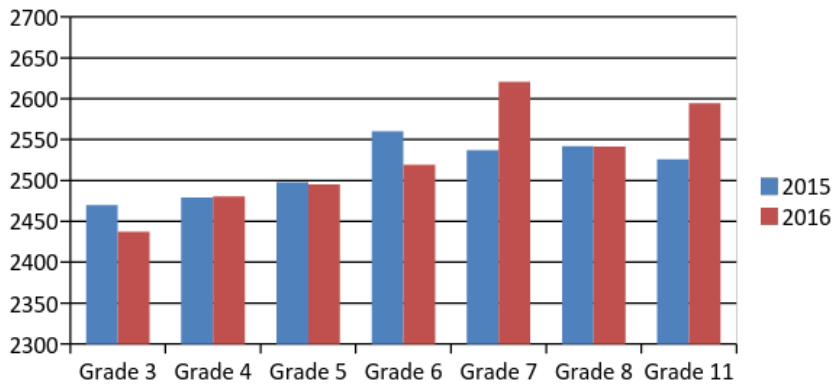
EMUU SBAC Math - 2 Year Comparison % Proficient



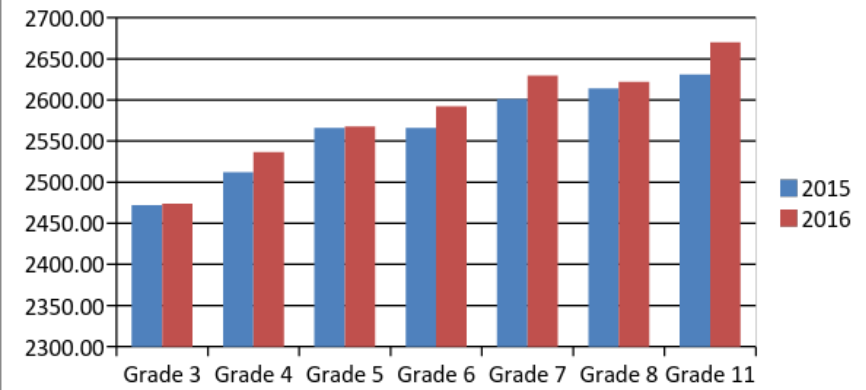
SSD SBAC Math - 2 Year Comparison % Proficient



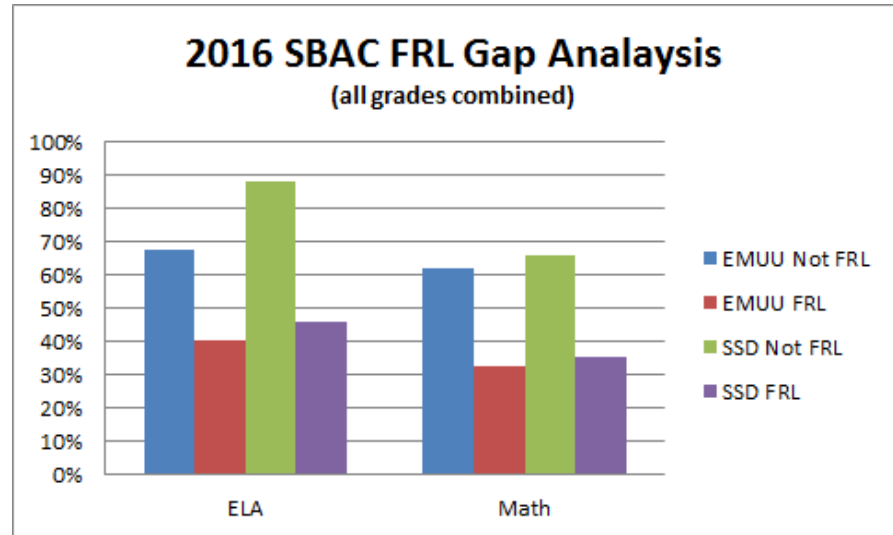
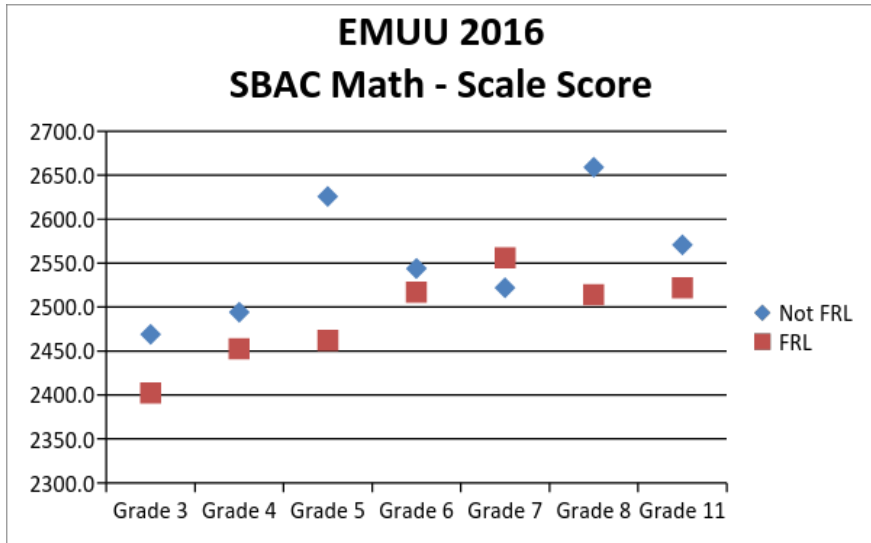
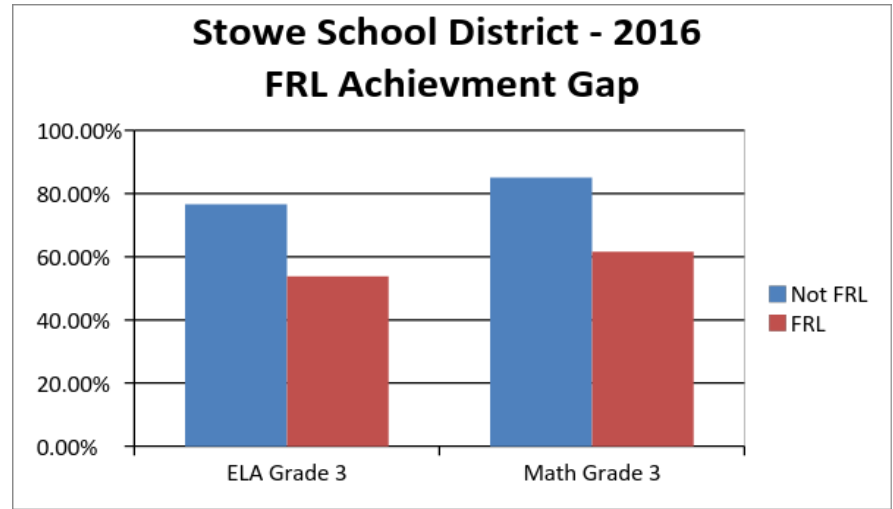
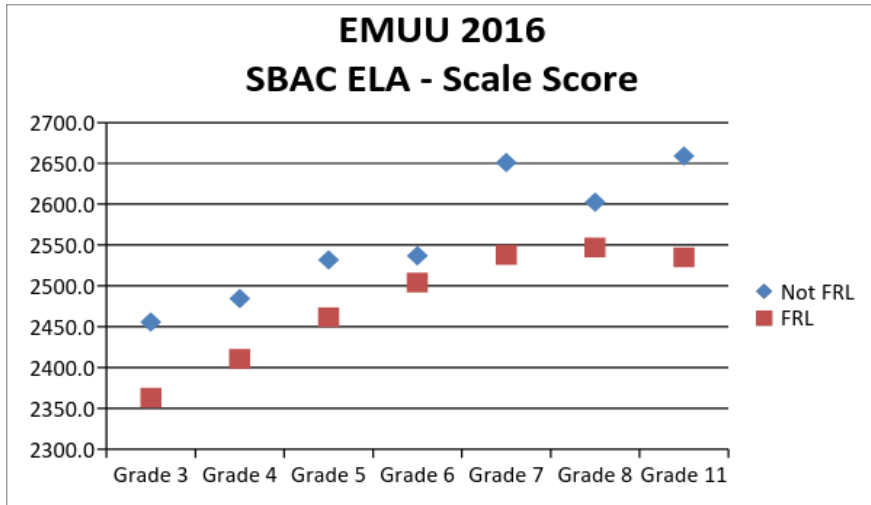
EMUU SBAC Math - 2 Year Comparison Scale Score



SSD SBAC Math - 2 Year Comparison Scale Score



SBAC – Achievement Comparison, FRL v. Not Gap



General Findings Regarding Student Outcomes

With the transition to SBAC, the percentage of Stowe students who are proficient continues to be higher in than in Morristown. The differences in overall student performance are less pronounced when looking at data through the lens of scaled scores. The difference between Stowe and Elmore-Morristown student performance is smaller when comparing students not economically disadvantaged (FRL). The achievement gap between students who are economically disadvantaged (FRL) and not is smaller in Elmore-Morristown schools as compared to Stowe schools.

For the districts of LSSU, there is greater transparency in accountability for student outcomes by school and school district, as has been the practice given our current governing structures, as compared to a single reporting system for a merged organization. Accountability and reporting data in a unified context, comparable to supervisory union level reporting (not shown in the the analysis above) in the current governance and operational structure, while indicative of strong systemic performance overall as compared to Vermont averages, will likely mask differences in performance which are critical to surface for future work in support of strong outcomes for all students.

Both systems experience differences in student outcomes between students who are economically disadvantaged (FRL) and those who are not. EMUU schools serve about twice as many students who are economically disadvantaged (FRL), and appear to have smaller achievement gaps, in some cases due to lower proficiency levels among students who are not economically disadvantaged (FRL), and at some grade levels, strong performance by all students, those who are economically disadvantaged and those who are not. SSD spends slightly more per student overall as compared to EMUU, and EMUU spends more on supports for students who are economically disadvantaged (FRL). These differences in outcomes as well as spending are key considerations for future continuous improvement plans.

It is essential that both systems study thoroughly the contributors to success where we see it and identify strategies to grow those successful practices, with intentional consideration of scale. What is working in EMUU and how can that be replicated in Stowe at a scale appropriate for Stowe's needs? What is working in Stowe that can be implemented at an appropriate scale in EMUU? How can both systems work together to address the common need to ensure all students achieve at high levels, including those who are economically disadvantaged and those who are not?

The EMUU and Stowe School Districts have a history of working together towards shared goals and scaling up for systemic implementation. Our work on Proficiency Based Learning (PBL) and personalization exemplifies this practice. We have developed common proficiencies and collaborate on supports and systems for implementation. Schools across the system have focused implementation efforts on different aspects on PBL and personalization, based on readiness and need, and lessons learned and decisions made during individual school implementation are shared and adapted for other schools in the system as they become ready to incorporate additional shifts in professional practice. For example, Stowe High has been working on a student portfolio, called Anagnorisis, for a number of years and approached initial work towards a PBL and personalization with the student portfolio as a starting point for the instructional shifts of PBL and personalization. PA had been working on instructional design aligned with the latest research on learning and the brain, and focused on student voice and learning scales as leverage points for shifts instructional practices. Both schools are sharing successes and lessons learned as the other expands work in an areas of focus by the other school

and faculty work together to support each other in their respective next steps in continuous improvement. This sort of practice should be replicated with a critical eye to student outcomes with faculty and staff. This practice should also be replicated for the work of boards in overseeing and supporting a shared commitment to both improving outcomes for all students and closing the achievement gap.

Continuous Improvement Plan:

- Continue the newly established practice of having board members attend the other district's budget meetings to build a shared understanding of opportunities for enhanced cooperation, equity of opportunity, fidelity of implementation of universal best practice, and areas where differences make sense.
- Identify additional specific strategies for school boards to ensure a shared, collaborative focus on closing the achievement gap in all schools:
 - Board meeting attendance
 - Common communications about student outcomes data and other subjects
 - Identify additional areas of key board work where collaboration may be enriching.
- Where there are common priorities that are difficult to support in individual districts, explore ways to work together such as with shared staff.
- Reframe data reporting to compare outcomes with top performing systems in Vermont, rather than Vermont averages. Set specific goals for student outcomes that reflect very high levels of student performance for all student groups.

Appendix H: Lamoille South Supervisory Union Comprehensive Plan for Continuous Improvement Needs Assessment and Action Plan

LSSU Mission: Students of LSSU will use core knowledge to construct, express, and act upon learning.



Students of LSSU will construct meanings and respond to complex situations using sound reasoning and creative thinking.

Students of LSSU will express ideas accurately, creatively and effectively to a variety of audiences.

Students of LSSU will act upon their rights and obligations as informed, respectful individuals and citizens of a democratic and interdependent society.

LSSU Value Statements:

All children belong.

All children learn.

Education should inspire imagination and creativity.

Learning is enhanced with personalization, courage, humor, relationship and risk taking.

Learning is a process that is to be taught, nurtured, and supported.

School Board Adoption and Review Dates:

	Elmore	Morristown	Stowe
Adoption Date	August 10, 2015	August 25, 2015	August 17, 2015
	Elmore - Morristown		
Year 1 Review Date - 2016	May 17, 2016		May 16, 2016
Year 2 Review Date - 2017	May 2, 2017		July 13, 2017
Year 3 Review Date - 2018			
Year 4 Review Date - 2019			
Year 5 Review Date - 2020			

Professional Development:

- To continuously grow and improve requires new learning and support. It is recognized that every focus area requires some level of systemic and individual professional development.

Expectations for Professional Culture:

- The schools of LSSU embrace the need for change for the benefit of students. This expectation is embedded and considered with each action step.
- Integration of technology to transform teaching and learning is an expectation.
- Regular and specific feedback, through formative assessments and other strategies, is an essential component of teaching practice.

Focus Area 1:

Personalize learning by facilitating student engagement and empowering student voice.

Needs Statement

Student voice is the individual and collective perspective and actions of young people within the context of learning and education. It is premised on the understanding that:

- Young people have unique perspectives on learning, teaching, and schooling;
- Their insights warrant not only the attention but also the responses of adults; and
- They should be afforded opportunities to t despite challenges and obstacles, and take visible delight in accomplishing their work. Student engagement requires that teachers, administrators, and school structures actively create the conditions that foster this reaction.

Goal

By April 2020,

1. Every student grades 5 - 12 will have an individual Personalized Learning Plan and a portfolio of authentic evidence which documents their growth.
2. Every high school senior has taken advantage of at least one flexible pathway opportunity during their high school years.
3. Effectively integrate technology for instruction (SAMR Model) to expand, enhance and transform learning opportunities for each student.
4. Set new targets for the 2020 – 2024 implementation plan.

To advance student achievement toward our mission the LSSU community will:

Action Plan

Steps to be taken

1. Create multiple pathways to rigor and relevance based upon a student’s personal interest, learning styles, and needs, as illustrated by Personal Learning Plans.
2. Ensure multiple avenues for students to have a voice in meaningful decision- making opportunities about school academics and environment.
3. Create opportunities for authentic and public demonstrations of learning which align with Personal Learning Plans.
4. Improve and expand systemic, age appropriate, reflective processes for students to curate, reflect, share and personalize their learning.
5. Develop systems for student feedback about instruction and engagement.

Possible Evidence:

- **Goal Setting Conferences w/ students**
- **climate survey results**
- **student leadership and decision making opportunities**
- **public demonstrations of learning (such as: open house, community meetings, concerts, academic fairs, art shows, shared blogs, etc.) and with authentic audiences**
- **academic pathways and mechanisms for choice**
- **personal learning plans - portfolios**
- **teacher technology standards and articulated proficiencies for teachers to support personalization**

Focus Area 2: Cultivate a safe and healthy school culture to facilitate learning for all individuals.	
<u>Needs Statement</u> Positive social relationships and attitudes about school are as important to the environment as are safe and well-kept buildings and grounds. A safe, clean, and well-maintained school with a positive psychosocial climate and culture can foster school connectedness, which in turn boosts student and staff health as well as students’ educational achievement.	<u>Goal</u> By April 2020, <ol style="list-style-type: none"> 1. Schools of LSSU will have a robust multi-tiered system of supports to teach and respond to behavioral needs. 2. Increase participation in the school and community in ways that enhance a sense of belonging. 3. Evidence of comprehensive health and wellness will be apparent in all aspects and spaces of school. 4. Set new targets for the 2020 – 2024 implementation plan.

To advance student achievement toward our mission the LSSU community will:

Action Plan
Steps to be taken
1. Establish an environment of shared accountability that promotes collaboration, mutual respect, and an understanding of roles and responsibilities.
2. Analyze our behavior data and identify research based responses which are proactive, positive and preventative.
3. Foster student, teacher, and community pride in the aesthetics of the school, including a visual environment that reflects student work.
4. To enhance learning, provide comprehensive integrated wellness education and opportunities for students and adults.
5. Cultivate an environment for students and adults that promote understanding of and respect for the many facets of diversity.
6. Implement integrated ‘digital citizenship’ education.
7. Create a culture within the schools that promotes expectations of organizational changes for the benefit of students.

Possible Evidence:

- **adult climate survey**
- **student and adult climate survey results**
- **wellness committee completed work & implementation**
- **assessment results**
- **TA or Homeroom relationships and teaching opportunities**
- **display of student work**
- **new and improved remodeled facilities as it relates to number 4 in action steps**
- **SAP resources and data**
- **culturally sensitive literature available and used**
- **responsive classroom/PBIS/AWOD practices school-wide**
- **behavior data**

Focus Area 3:

Build positive family – school – community partnerships. (understanding of educational shifts)

Needs Statement

Family and community involvement in education is one way in which our society shows children that they are valued and important. Improved connections between family, school, and community has been shown to:

- Increase test scores and graduation rates.
- Increase the number of children attending schools and decrease the number of absences.
- Increase motivation and improve self-esteem.
- Decrease the use of drugs, alcohol, and violent behavior.

Goal

By April 2020,

1. Schools, families and community partners have a shared vision of education.
2. All families are engaged in the school community.
3. Set new targets for the 2016 – 2020 implementation plan.

To advance student achievement toward our mission the LSSU community will:

Action Plan

Steps to be taken

1. Use technology to access and share authentic learning beyond the school walls.
2. Create multiple pathways to rigor and relevance based upon a student’s personal interest, learning styles, aptitudes, and needs. For example, these pathways could include internships, dual-enrollment, community service, and global partnerships.
3. Develop a proficiency-based reporting system and transcript designed to capture evidence of Construct, Express, Act.
4. Ensure multiple opportunities for expositions of student work that highlight Mission Related Goals accomplishments and fosters community support for learning.
5. Communicate effectively to engage with families and community members in support of learning. (Evidence may include: PR, Branding, School level communication)
6. Establish a clear, coordinated system for identifying, utilizing, and maximizing appropriate community resources to support student needs. (Expand connections outside of crisis situations)
7. Build a culture of active listening and learning with parents. (Responding to parent concerns, specific student)
8. Provide parent, community, and other stake-holders with information/education on changing assessment and instructional practices using a variety of formats. (such as PLP presentations, student-led conferences, revised programs of studies, open houses, public forums, blogs, etc.,).

Evidence:

- **Increase in number of students who take advantage of learning opportunities outside of school.**
- **Parent Climate survey**
- **Established blogs/public sources of communication between community and school**
- **Community Advisory Board (Wellness)**
- **PLP**

Focus Area 4:
Build a multi-tiered system of support which is responsive to individual learner’s needs and holds both students and adults accountable for continuous student improvement.

Needs Statement
Educators identify students’ needs and adjust instructional strategies to ensure growth. Key factors to ensure that every student achieves include progress monitoring and use of student performance data to continually evaluate the effectiveness of instruction and make informed instructional decisions.

Goals
By April 2020,

- 1. Schools of LSSU will have a robust multi-tiered system of supports to respond to academic needs.**
- 2. Schools of LSSU will have a systemic approach to collect, analyze, and utilize student performance data to inform instruction.**

To advance student achievement toward our mission the LSSU community will:

Action Plan
Steps to be taken
1. Implement research based formative and summative assessments (classroom, district, state level) to collect, analyze and utilize data to influence instructional and behavioral outcomes.
2. Focus instruction on proficiency targets while identifying and providing flexible pathways for success; (Including, but not limited to: Universal Design for Learning (UDL), Differentiated Instruction (DI), community partnerships, internships, dual enrollment, blended learning, early college, on-line courses, etc.).
3. Define and implement an Educational Support System (ESS), focusing on both academic and behavioral growth, utilizing the Multi-Tiered System of Support (MTSS) model and consistent progress monitoring.
4. Make decisions about structures such as: scheduling, school resources, personnel, and technology, to create a systemic focus on student learning.

Evidence:

- Student work/data which shows growth
- Examples of strategies used in the classroom (formative and summative)
- percentage of students achieving the proficiency targets for their grade level
- percentage of student participating in flexible pathways (dual enrollment etc.)
- personal learning plans (PLP) 5th - 12th grades
- Academic and Behavior data
- ESS meeting minutes

Focus Area 5: Collaboratively develop curriculum, assessment, and instructional practices to promote a proficiency based system of learning.	
<u>Needs Statement</u> Curriculum is a course of study. A clearly articulated and aligned curriculum, with common and agreed upon student expectations and performance indicators is a key feature of effective schools. It fully outlines the content, concepts, and skills that are <i>essential</i> within an academic discipline and at each grade level to ensure all students have the opportunity to achieve proficiency. Such a curriculum is a combination of opportunity to learn and time. All students require equal access to content with sufficient time for learning to occur. In this way focus area 5 defines our essential learning with grade level performance indicators, while focus area 4 is our deliberate and integrated response to children who may not be meeting these targets.	<u>Goal</u> By April 2020, <ol style="list-style-type: none">1. Schools of LSSU will have systems and practices to monitor progress and achievement of proficiency.2. Graduation decisions are made based on student evidence within a proficiency based system of learning.3. Comprehensive instructional strategies, methods, assessments and materials will be recorded in ATLAS and support the collection of evidence of proficiency.

To advance student achievement toward our mission the LSSU community will:

Action Plan
Steps to be taken
1. Examine and develop formatting options for ATLAS that continue to support integrated curriculum and proficiency based learning.
2. Utilize the district curriculum maps in ATLAS as part of mentoring and the supervision and evaluation process, to promote a culture of collaboration.
3. 3. Continue to review and maintain the structures that support on-going growth and collaboration (i.e. Curriculum Council, steering committees, Curriculum Camp, etc.)
4. Implement research based instructional strategies which support students achieving proficiency.
5. Revise the LSSU local assessment system so that it provides evidence of proficiency through a variety of means emphasizing formative assessment and authentic application.
6. Ensure collaboration and integration across disciplines (e.g. STEAM, whole child focus, humanities).
7. Create a culture for learning which encourages and models reflection, practice, effort, and other dispositions that influence achievement. (i.e. growth mindset, Habits of Mind)
8. Develop common performance levels for proficiency standards,

Evidence:

- Graduation Proficiencies
- Atlas documentation indicating clear connections to proficiency based learning
- PLP's
- Integration of subject areas within lesson plans/activities/team teaching
- Instructional practices
- Student work

Appendix I: Mission - Lamoille South Supervisory Union

OUR MISSION

Construct | Express | Act

Construct

A classroom of thinkers and problem solvers is one where students construct meanings and respond to complex situations using sound reasoning and creative thinking as they...

- Reflect on learning experiences and processes
- Effectively analyze and evaluate evidence, considering alternative points of view
- Solve problems in both conventional and innovative ways; transfer prior learning to obtain solutions
- Use information accurately and creatively for the issue or problem at hand
- Understand that creativity and innovation is a long-term, cyclical process of small successes and frequent mistakes

Express

A classroom of effective communicators is one where students express ideas accurately, creatively, and effectively to a variety of audiences as they...

- Synthesize complex information and perspectives to create meaning
- Assume shared responsibility for collaborative work, and value the individual contributions made by each team member
- Utilize multiple media and technologies, and know how to judge their effectiveness



Act

A classroom of personally and socially responsible citizens is one where students act upon their rights and obligations as informed, respectful individuals and citizens of a democratic and interdependent society.

- Develop personal and academic goals and design actions to achieve the goals
- Develop an understanding of their interdependence with the world

Appendix J: VSAC Post-Secondary Survey Results

2016: (NCS Data Used)

Peoples Academy:

77.9% of seniors in the Class of 2016 participated in the Senior Survey
(Of the 53 seniors who completed the survey 56.6% were female and 43.4% were male.)

N/A of seniors participated in the Follow-up Senior Survey.

20% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

10% of graduates plan to earn an associates degree.

60% plan to complete a bachelors degree or higher

80.4% agree or strongly agree school provided them a good education.

55.7% agree or strongly agree school gave me the skills to succeed in life.

55.8% agree or strongly agree school gave them the skills to succeed in work or college

56% agree or strongly agree that classes were rigorous and challenging.

N/A of graduates continued their education on a full or part-time basis within six months of high school graduation

N/A% Males and N/A% Females enrolled within 6 months

55.7% of Parent 1 had not completed a bachelor's degree or higher.

68.6% of Parent 2 had not completed a bachelor's degree or higher

Most important Reason Seniors decided not to continue their education:

29.4% I need a break

23.5% I want to work to support myself

5.9 % I need to work to support myself

5.9% I am joining the military

11.8% I am unsure of my plans

11.9% Travel

5.9% Other

23.5% reported ability to pay for college a major concern.

Stowe:

80% of seniors in the Class of 2016 participated in the Senior Survey
(Of the 40 seniors who completed the survey 47.5% were female and 52.5% were male.)

N/A% of seniors participated in the Follow-up Senior Survey.

0% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

0% of graduates plan to earn an associates degree.

87.1% plan to complete a bachelors degree or higher

87.5% agree or strongly agree school provided them a good education.

50% agree or strongly agree school gave me the skills to succeed in life.

66.7% agree or strongly agree school gave me the skills to work or college.

78.9% agree or strongly agree that classes were rigorous and challenging.

N/A% of graduates continued their education on a full or part-time basis within six months of high school graduation

N/A Males and N/A% Females enrolled within 6 months

28.9% of Parent 1 had not completed a bachelor's degree or higher.

39.4% of Parent 2 had not completed a bachelor's degree or higher

Most important Reason Seniors decided not to continue their education:

0% I need a break

0% I want to work to support myself

0% I need to work to support myself

0% I am joining the military

33.3% I am unsure of my plans

33.3% I want to travel

33.3% Other (travel)

24.3% reported ability to pay for college a major concern.

2014: (NCS Data Used)

Peoples Academy:

75.3% of seniors in the Class of 2014 participated in the Senior Survey
(Of the 55 seniors who completed the survey 52.7% were female and 47.3% were male.)

72.6% of seniors participated in the Follow-up Senior Survey.

12.7% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

10.9% of graduates plan to earn an associates degree.

56.3% plan to complete a bachelors degree or higher

61.8% agree or strongly agree school provided them a good education.

48.1% agree or strongly agree school gave me the skills to succeed in life.

37.7% agree or strongly agree that classes were rigorous and challenging.

50.9% of graduates continued their education on a full or part-time basis within six months of high school graduation

45.8% Males and 55.2% Females enrolled within 6 months

53.7% of mothers had not completed a bachelor's degree or higher.

62.3% of fathers had not completed a bachelor's degree or higher

Most important Reason Seniors decided not to continue their education:

23.5% I need a break

29.4% I want to work to support myself

17.6 % I need to work to support myself

0% I am joining the military

0% I am unsure of my plans

5.9% Other

17.2% reported ability to pay for college a major concern.

Stowe:

79.3% of seniors in the Class of 2014 participated in the Senior Survey
(Of the 46 seniors who completed the survey 41.3% were female and 58.7% were male.)

79.3% of seniors participated in the Follow-up Senior Survey.

0% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

2.2% of graduates plan to earn an associate's degree.

93.5% plan to complete a bachelor's degree or higher

95.7% agree or strongly agree school provided them a good education.

60.8% agree or strongly agree school gave me the skills to succeed in life.

80% agree or strongly agree that classes were rigorous and challenging.

80.4% of graduates continued their education on a full or part-time basis within six months of high school graduation

74.1 Males and 89.5% Females enrolled within 6 months

27.9% of mothers had not completed a bachelor's degree or higher.

31.1% of fathers had not completed a bachelor's degree or higher

Most important Reason Seniors decided not to continue their education:

33.3% I need a break

33.3 I want to work to support myself

0% I need to work to support myself

0% I am joining the military

0% I am unsure of my plans

33.3% Other (travel)

35.7% reported ability to pay for college a major concern.

2012: (NCS Data Used)

Peoples Academy:

92.0% of seniors in the Class of 2012 participated in the Senior Survey

90.7% of seniors participated in the Follow-up Senior Survey.

10.1% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

8.7% of graduates plan to earn an associate's degree.

66.7% plan to complete a bachelor's degree or higher

36.4% agree or strongly agree there were accommodations for different learning styles.

36.9% agree or strongly agree there were opportunities to think and creatively problem solve.

23.1% agree or strongly agree that classes were rigorous and challenging.

58.8% of graduates continued their education on a full or part-time basis within six months of high school graduation

46.7% Males and 68.4% Females enrolled within 6 months

64.2 percent of graduates were from households where neither parent had completed a bachelor's degree.

Most important Reason Seniors decided not to continue their education:

23.1% I need a break

15.4% I want to work to support myself

19.2 % I need to work to support myself

11.5% I am joining the military

7.7% I am unsure of my plans

15.4% Other

17.1% reported ability to pay for college a major concern.

Stowe:

75.4% of seniors in the Class of 2012 participated in the Senior Survey

75.4% of seniors participated in the Follow-up Senior Survey.

0% of graduates indicated that a high school diploma was the highest level of education they planned to complete.

2.2% of graduates plan to earn an associate's degree.

63% plan to complete a bachelor's degree or higher

67.4 agree or strongly agree there were accommodations for different learning styles.

75% agree or strongly agree there were opportunities to think and creatively problem solve.

77.2% agree or strongly agree that classes were rigorous and challenging.

60.9% of graduates continued their education on a full or part-time basis within six months of high school graduation

50% Males and 70.8% Females enrolled within 6 months

15.6 percent of graduates were from households where neither parent had completed a bachelor's degree.

Most important Reason Seniors decided not to continue their education:

33.3% I need a break

0% I want to work to support myself

16.7 % I need to work to support myself

0% I am joining the military

16.7% I am unsure of my plans

33.3% Other

23.1% reported ability to pay for college a major concern.

2010:

Peoples Academy:

89.3% of the Class of 2010 participated in the first stage of the Senior Survey.

74.6% returned a completed follow-up survey.

15.0% of graduates indicated that a high school diploma was the highest level of education they plan to complete.

5.0% of graduates plan to earn a certificate or associate's degree

60.0% plan to complete a bachelor's degree or higher.

96.0% of graduates "strongly agree" or "agree" that Peoples Academy provided them with a good education.

64.6% of graduates continued their education on a full- or part-time basis within six months of high school graduation.

56.5% of males and 67.3% of females continued their education immediately after graduation.

The most important reason graduates from Peoples Academy reported for not continuing their education was "I wanted to work instead of continuing my education."

"Cost" was not listed as an important reason.

Stowe:

67.4% of the Class of 2010 participated in the first stage of the Senior Survey.

64.5% returned a completed follow-up survey.

0.0% of graduates indicated that a high school diploma was the highest level of education they plan to complete.

0.0% of graduates plan to earn a certificate or associate's degree

95.5% plan to complete a bachelor's degree or higher.

100.0% of graduates "strongly agree" or "agree" that Stowe High School provided them with a good education.

89.3% of graduates continued their education on a full- or part-time basis within six months of high school graduation.

93.8% of males and 91.7% of females continued their education immediately after graduation.

The most important reason graduates from Stowe High School reported for not continuing their education was "Other."

"Cost" was not listed as an important reason.

Appendix K: Vermont High School Post-Secondary Enrollment, Persistence, and Completion Study

National Student Clearing House Data as of November 22, 2016

Introduction:

Postsecondary Enrollment Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of their high school graduation date. This rate is not based on the 9th grade cohort.

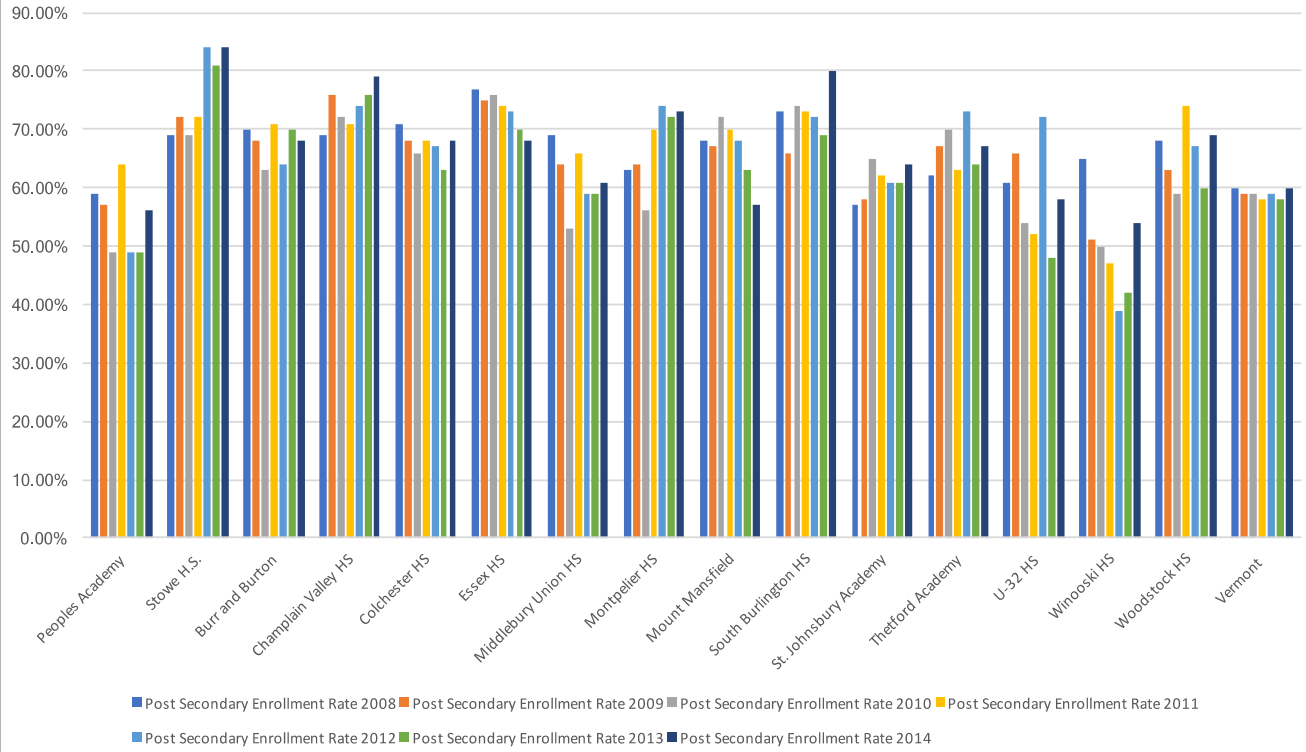
Postsecondary Persistence Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of High School Graduation; and persisted in postsecondary for at least three semesters within two academic school years.

Postsecondary Completion Rate: This report represents Vermont students who graduated with a regular high school diploma and enrolled in an institution of higher education within 16 months of their high school graduation date, and graduated within six academic school years after high school graduation.

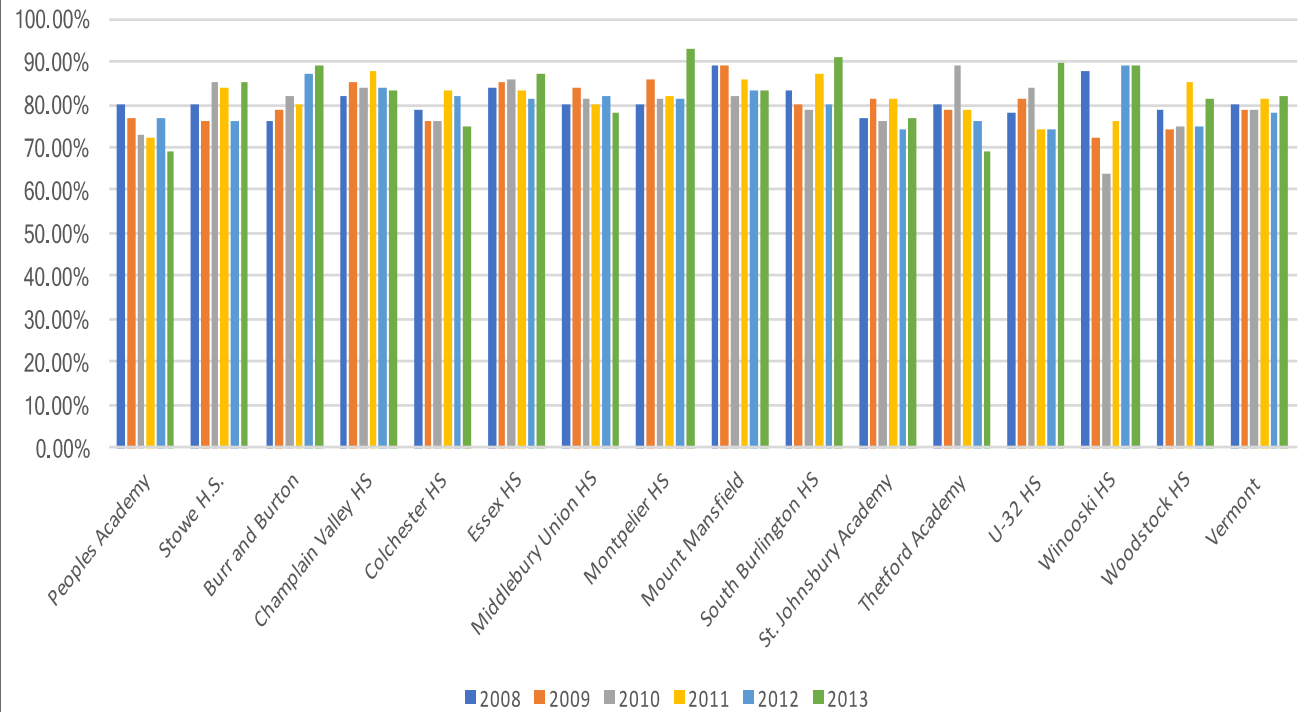
Important Note on Data:

The National Student Clearinghouse collects enrollment data from ~98% of the postsecondary institutions that participate in Title IV Student Loans. While this captures the majority of postsecondary enrollments, it may not include many trade, vocational, military, and international institutions, or apprenticeship programs. This report does not include publicly tuitioned students that attend out of state high schools. Also, students and schools can opt for a Family Educational Rights and Privacy Act (FERPA) blocker on their enrollment records and therefore not be included in NSC reports.

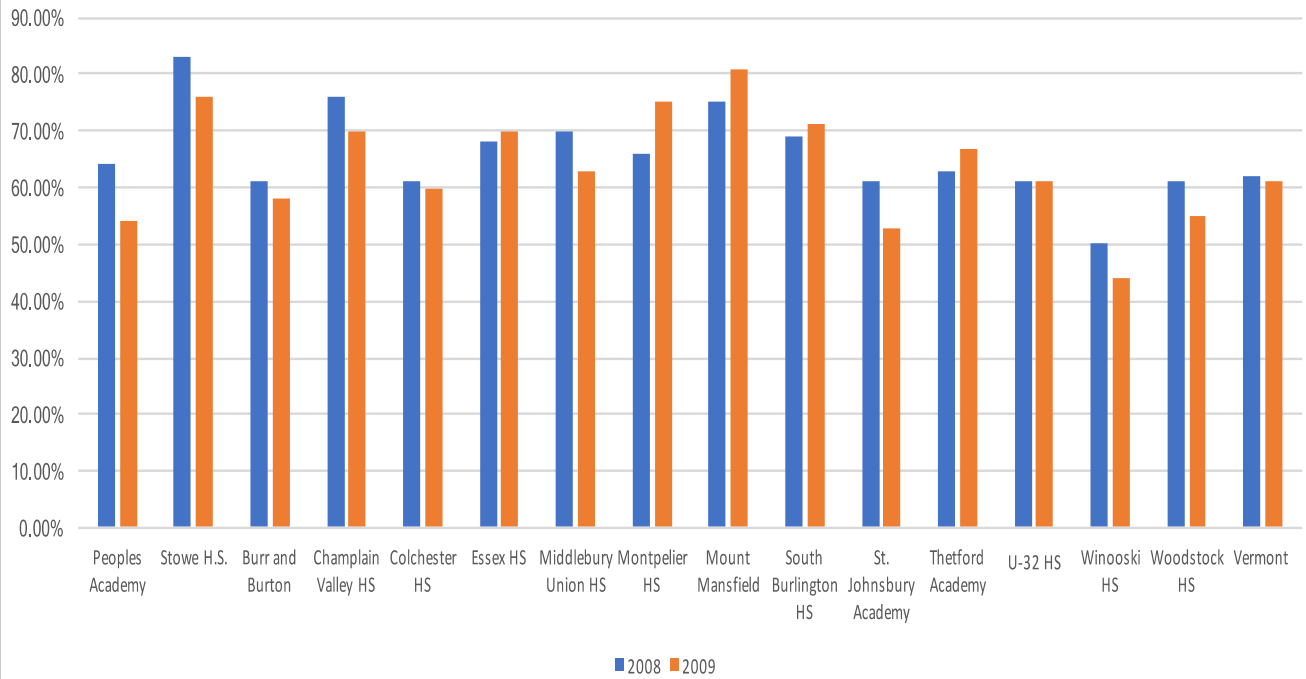
Vermont High School Post Secondary Enrollment Rates 2008-2014



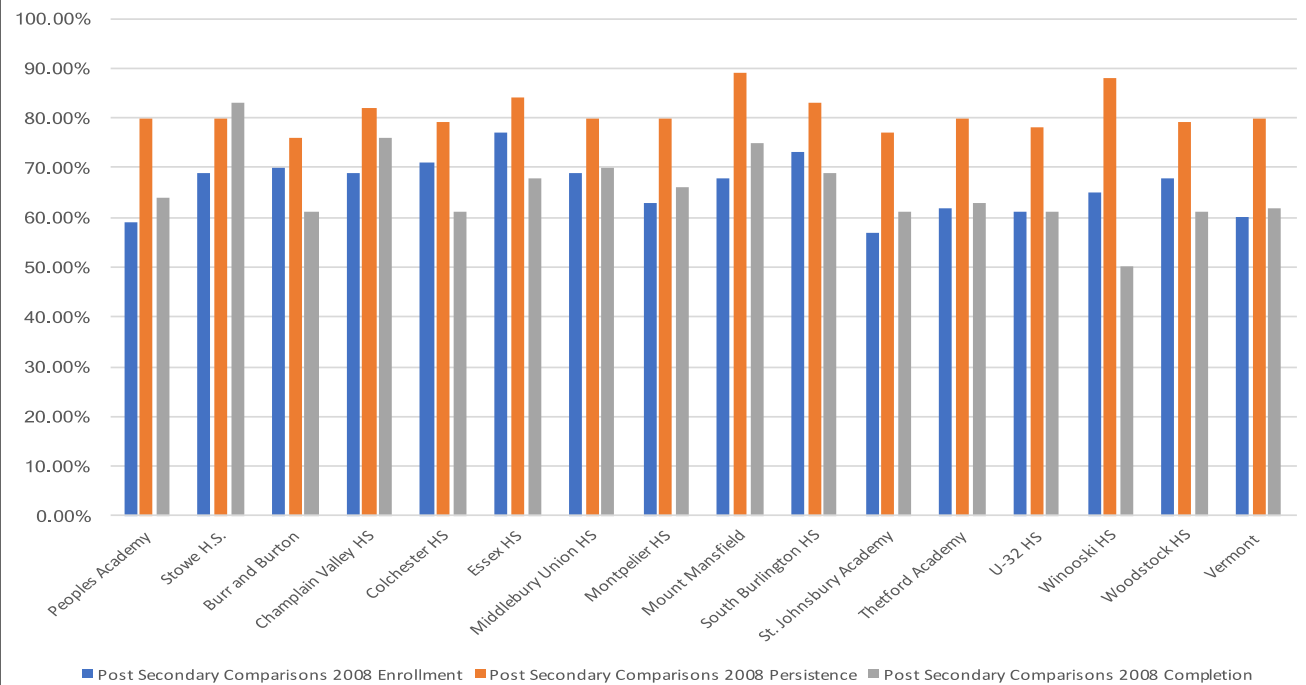
Vermont High School Post Secondary Persistence Rates: 2008-2013



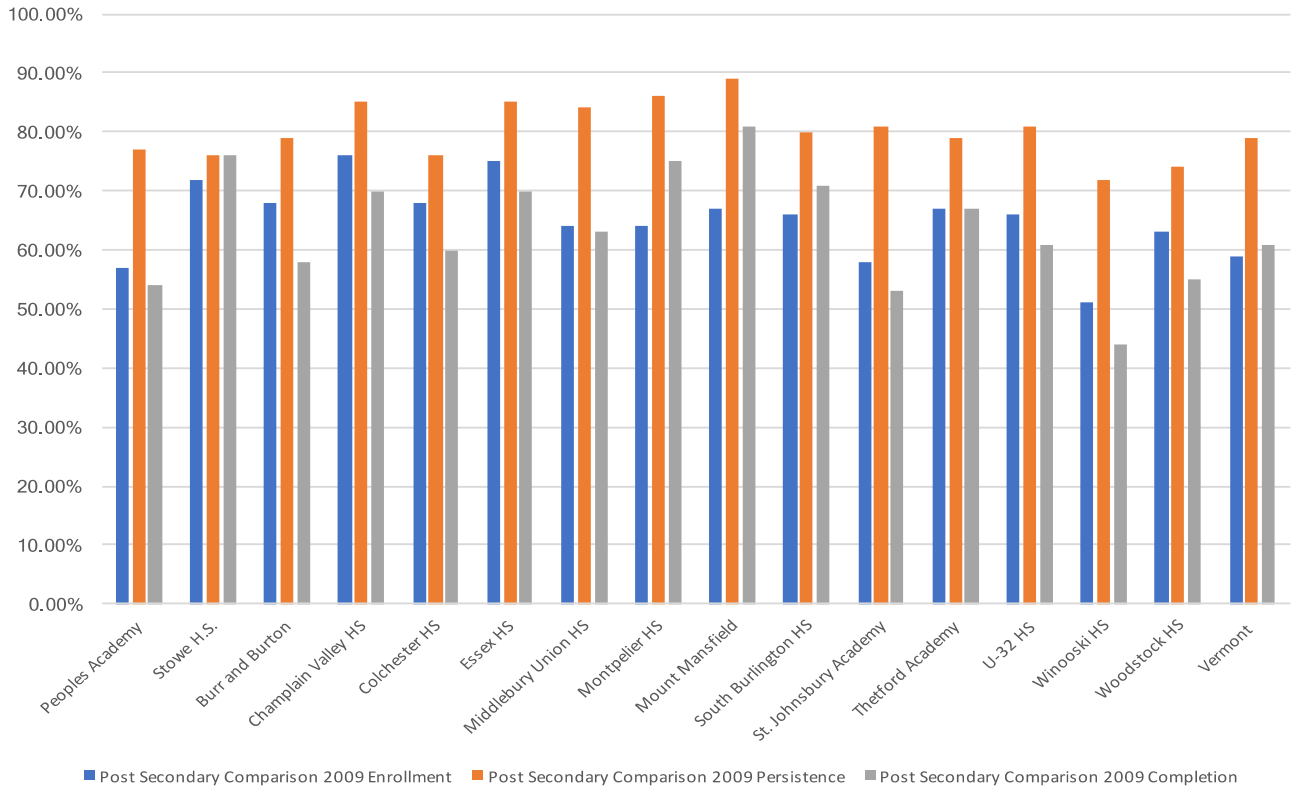
Vermont High School Post Secondary Completion Rates: 2008, 2009



Vermont High School Post Secondary Results - 2008



Vermont High School Post Secondary Results - 2009



Appendix L: Wolcott Unification - Financial Data

Act 46 and Beyond - Unification with Wolcott
August 10, 2017

Estimated Tax Rate Impacts

Assumptions

Based on FY18 EMUU & SSD Budgets

Add: Wolcott FY18 budgeted expenditures	+ \$4,611,950
Less: tuition amount in Wolcott's FY18 budget for full implementation	- \$1,847,826
Less: tuition amount in Wolcott's FY18 budget for EMUU/SSD only for grandfathered	- \$ 302,400 / \$ 204,400
Add: Local, SU, and federal revenue sources from Wolcott FY18 budget	+ \$ 146,194
Less: Revenue from tuitioned students to EMUU & SSD	-\$379,000/279,000
Add: Wolcott FY18 equalized pupils	+ 279.12
FY18 CLA for EMUU & SSD; FY17 for Wolcott	
EMUU & SSD each have capacity for all Wolcott students	

	EMUU		Wolcott		SSD		Wolcott	
	Local Homestead Tax Rate	Diff. from FY18	Local Homestead Tax Rate	Diff from FY18	Local Homestead Tax Rate	Diff from FY18	Local Homestead Tax Rate	Diff from FY18
Full Implementation	\$1.311 \$1.299	-\$0.084 -\$0.084	\$1.306	-\$0.245	\$1.397	-\$0.128	\$1.328	-\$0.223
Grandfathering Year 1	\$1.439 \$1.425	+\$0.043 +\$0.043	\$1.434	-\$0.118	\$1.559	+\$0.035	\$1.483	-\$0.026

**APPENDIX M: MINUTES OF AUGUST 10, 2017 MEETING WITH WOLCOTT
SCHOOL BOARD
Special Board Meeting
Wolcott, VT
August 10, 2017**

Members present from Elmore-Morristown: Stephanie Craig and Christy Snipp; Stowe: Tiffany Donza and Jim Brochhausen. Tracy Wrend, Superintendent, represented the administration. Guests were Kayla Collier, Tom Snipp, Richard Craig, Rick Pembroke, Matthew Foster, Members of the Wolcott Board, and Guests of the Wolcott Board.

The purpose of the special meeting was to share information with the Wolcott School Board. A quorum of Lamoille South Supervisory Union board members was present for the conversation. The LSSU meeting came to order at 6:06pm.

Stephanie Craig and Jim Brochhausen shared information on Elmore-Morristown Unified Union's and Stowe School District's plan and process for completing a self-evaluation and request for an alternative governance structure by October of 2017.

Wolcott board members indicated Wolcott was committed to an alternative governance structure within Orleans Southwest Supervisory Union.

Tracy Wrend presented models, based on FY 18, of tax rate impacts if Wolcott merged with either Elmore-Morristown or Stowe, operating the elementary school and then sending all students in grades 7-12 to Peoples Academy Middle Level/Peoples Academy or Stowe Middle/High School. Tracy also reviewed the estimated tax rate implications in year one of transition if students attending other schools were grandfathered and able to finish school in their current school of choice.

Wolcott board members and community members asked questions.

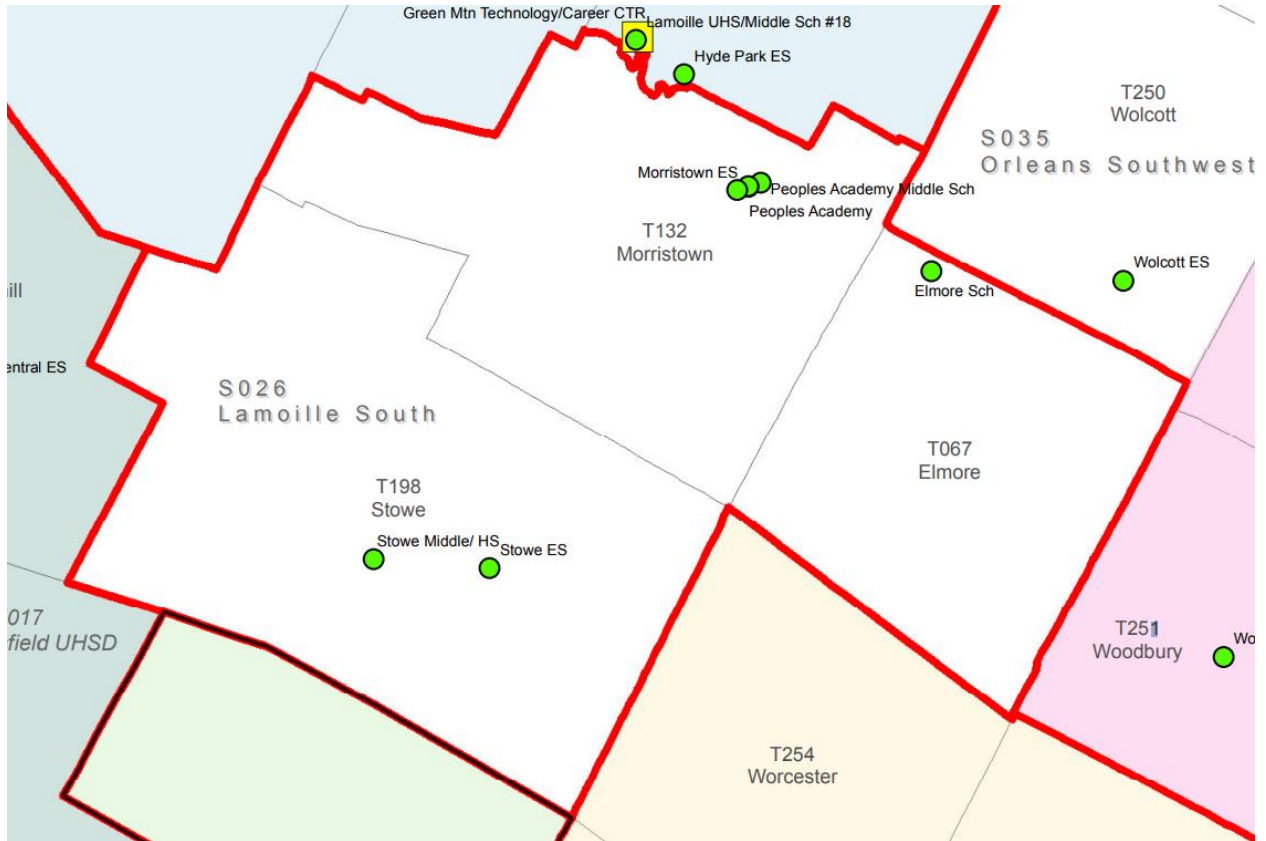
Superintendent Wrend and LSSU board members present emphasized that the Wolcott board is encouraged to reach out if interested in discussing future options further.

The discussion ended at 6:35pm and the LSSU meeting was adjourned.

Respectfully submitted,

Tracy Wrend
Clerk, pro tem

APPENDIX N: LSSU GEOGRAPHY



Distance between Peoples Academy and Stowe High School: 12.2 miles, 24 minutes

Distance between Morrystown Elementary School and Stowe Elementary School: 9.6 miles, 17 minutes

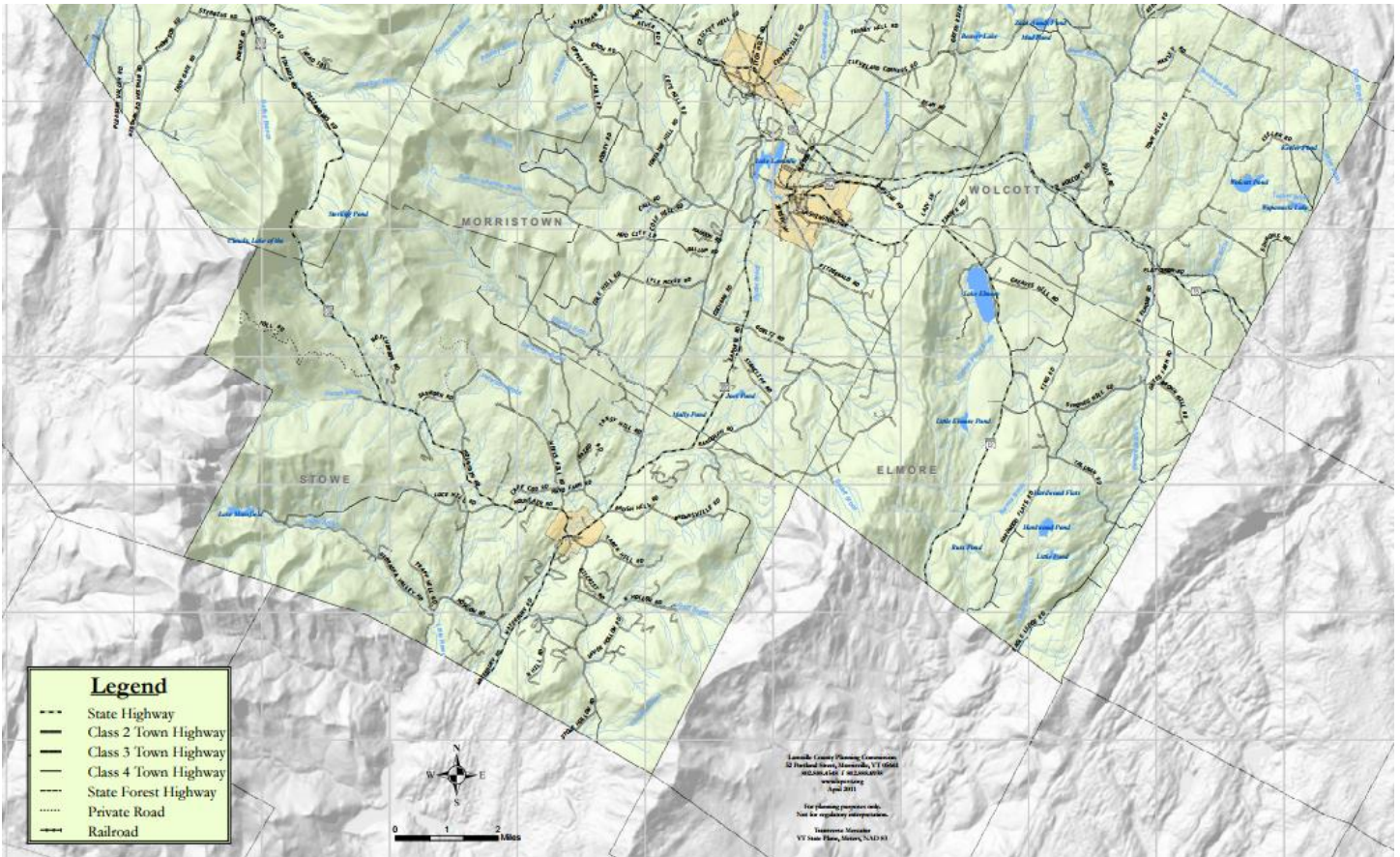
Distance between the Elmore School and Morrystown Elementary School: 5 miles, 8 minutes

Town of Elmore: 39.58 sq mi (102.5 km²)

Town of Morrystown: 51.68 sq mi (133.9 km²)

Town of Stowe: 72.76 sq mi (188.4 km²)

Roads of Lamoille South



APPENDIX O: LAMOILLE SOUTH SUPERVISORY UNION ACT 46 MEETINGS

July 21, 2015
September 9, 2015
March 30, 2016
September 14, 2016
November 30, 2016
December 14, 2016
March 22, 2017
April 26, 2017
May 8, 2017
May 31, 2017
July 10, 2017
August 10, 2017
August 16, 2017
September 13, 2017
September 25, 2017 – Community Engagement Meeting
September 26, 2017 – Community Engagement Meeting
October 24, 2017
November 15, 2017