

Lincoln Supervisory District Progress Report
Prepared for the State Board of Education
Prepared: April 15, 2023

The Lincoln Supervisory District continues its progress to becoming fully operational by July 1, 2023. The quality of the effort and the ability to be adequately prepared by July 1, 2023, is directly linked to the skills, experience and commitment of the individuals involved in the process. To provide this context, attached are resumes of key individuals engaged by LSD to support this process. (See Attachments A, B, C)

The LSD Board feels it is important to note that the Lincoln Community School has been a high-functioning grade K-6 elementary school that has met Education Quality Standards before and after becoming part of MAUSD. Its operations are informed by existing policies, procedures, training, and operational manuals developed by MAUSD and it has highly experienced educators and administrators who, with few exceptions, will remain at the school. While there are clearly many elements of a Supervisory District to put in place to ensure the continued success of LCS and the District, the standards of daily operations, the quality of leadership and teaching, and the existence of policies and procedures that will continue to be used by LSD provides a highly stable educational environment as we begin FY24.

LSD enrollment is also expected to increase by 6%-9% in FY24 over FY23 due to enrollment from currently homeschooled students and requests for enrollment by non-district students.

Areas of Activity

1. Finance, Personnel & Data Management

a. Budget approval and funding for planning and transition activities

Describe the actions taken to develop a budget and secure funding to pay for expenses incurred to date and future expenses related to planning and transition of LSD to an operational supervisory district, up until July 1, 2023. Funding should be consistent with the requirements of 16 VSA §4029.

- LSD has raised \$98,000 to-date from private donors to cover expenses from 5/18/2022 - 6/30/2023 to allow it to take “all steps necessary for the district to assume sole responsibility for the education of Lincoln students in a manner that meets education quality standards and all other state and federal laws on July 1, 2023.” (SBE minutes, May 18, 2022).
- Funding is consistent with the requirement of 16 VSA 4029 and uses are restricted to one-time start-up expenses. The major expense categories for use of these funds include legal counsel, education and financial consultants, technology purchases and implementation, and data migration from MAUSD.
- No municipal funds from the Town of Lincoln have been used to support the expenses of Lincoln’s transition to a Supervisory District

b. Financial and operational modeling and first year budget

- Describe the actions that have been taken and will be taken to develop financial and operational modeling, to include enrollment, staffing, revenue, expense, debt service, and tax rate projections for the district, including for the Lincoln Community School, tuitioned grades, central office, special education, and transportation.

Actions taken by the Lincoln School District to develop a financial and operational model for the District include, but are not limited to:

- Engaged a former Operations Manager and Business Manager of two Vermont. SUs/SDs as a consultant to support budget modeling (Attachment B).
 - retired Vermont and NH school administrator with 35 years' experience in special education and district management, to serve as LSD's Acting Superintendent (Attachment A). This individual will continue as the LSD Superintendent effective July 1, 2023.
 - Engaged a community member with extensive financial, administrative, technology and systems management experience to oversee technology implementation as well as advise on business operations. (Attachment C)
 - Created Finance, Facilities Management, Hiring, and Transportation Committees to focus on those specific areas.
 - Obtained enrollment and staffing information from MAUSD, as well as information on special education, food service, afterschool programming, transportation, debt service, and AOE revenue sources.
 - Obtained financial information from MAUSD for functions that will be transferred to LSD.
 - Researched and developed policies and procedures to tuition grades 7-12.
 - Reviewed all special education interventions to determine adequacy and appropriateness and develop a special education budget for FY24 budget.
 - Used information from and worked directly with individuals in the AOE Department of Finance to develop revenue projections.
 - Used information and methodologies provided by the AOE and VT Tax Office to develop tax rate projections
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- Provide the final draft of the first-year budget, accompanied by a presentation or discussion of how the budget will ensure compliance with federal and other budgeting requirements and is connected to LSD's goals and priorities. The update should identify the sources of all funding and provide details of requirements and application deadlines for grants upon which LSD will depend for revenues during its first year of operations.

The LSD FY24 Budget was approved by District voters at the District Annual Meeting on April 11, 2022. Total approved expenditures are \$4,465,130. The budget and tax calculations can be found in attachments D1 and D2.

The budget was developed through a deliberate, iterative process with a highly experienced former VT SU/SD business manager, the Acting LSD Superintendent, the LCS principal, the LSD Board, and informed by representatives of MAUSD with responsibility for functions that will be transferred to LSD.

A primary goal of the Board for the coming year is to ensure stability and consistency at the Lincoln Community School – for students, families, and staff -- even as changes related to being a Supervisory District unfold. The budget funds approximately the same level of staffing and programming at LCS as the current year and does not anticipate significant changes to school operations.

The budget supports a streamlined central office, which will be housed in the Lincoln Community School. It supports central office staff salaries sufficient to attract experienced district administrators.

The amount of the Small Schools Grant was calculated and provided by Brad James, AOE Department of Finance. Announced grant amounts available for Lincoln for Title 1, Title IIa, and Title IX total \$36,000. Amounts available for other State/Federal grants (ie. IDEA-B, IDEA-BPS, Best-Act 230, EPSDT) have not yet been announced. Grant applications will be submitted during the relevant submission windows this spring. LSD will also apply for grants from VSBIT to support school safety and human resources (up to \$10,000).

Special Education and Transportation revenue was calculated using relevant AOE formulas. Other revenue line items are based on previous year actuals. Revenue from MAUSD was part of the negotiated Withdrawal Agreement.

c. Accounting & Internal Controls

- Describe the actions that have been taken or that will be taken to ensure:

LSD will maintain accounting systems and records that ensure transparency and accountability for all funds, regardless of source, and provide complete, accurate, reliable, and timely data for reporting, including: (a) maintaining accounting records in accordance with Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board principles (GASB) and (b) recording and reporting information consistent with Vermont's Uniform Chart of Accounts within the SD's accounting software.

Implementation and training on Tyler Technologies' ERP – an education business management platform used in districts across Vermont – is underway and scheduled for completion by June 1. Lincoln will specifically utilize the financial management, human

resource management, and grants management modules. An experienced Business Manager, operating in-line with the VT AOE Handbook for Financial Accounting (<https://education.vermont.gov/sites/aoe/files/documents/edu-handbook-2-AOE-12012019-v1.0.pdf>), will be responsible for maintaining the financial management system and ensuring financial recording and reporting in accordance with Generally Accepted Account Principles (GAAP) and Governmental Accounting Standards Board (GASB) principles. The accounting module will be configured for Vermont's Uniform Chart of Accounts and will ensure transparency and accountability for all funds, regardless of source, and provide complete, accurate, reliable, and timely data for reporting to meet federal and state reporting requirements.

- LSD's grants management practices will enable the SD to spend its federal grant funds, effectively and efficiently, and prevent reversion of funds.

The Tyler Technologies grant management module has been configured to align with state and federal grant reporting requirements. The Superintendent, Business Manager, and Special Services Director will ensure federal funds are used effectively and efficiently to prevent reversion of funds. The LSD Board will regularly review reports of grant spending as well as all monthly financial reports.

- Internal controls will be in place to provide reasonable assurance that LSD (a) follows state and federal statutes and regulations regarding required audits, records and record retention, and safeguarding protected information and other information designated as sensitive; and (b) maintains effective procurement and contract administration processes.

The VT AOE Internal Financial Controls Checklist for Schools will be followed to ensure the integrity of internal controls, implemented by an experienced Business Manager, and monitored by the Superintendent, and District Treasurer. <https://auditor.vermont.gov/sites/auditor/files/documents/Internal%20Financial%20Controls%20Checklist%20for%20Schools%20v.1%20%20Fillable%20with%20digital%20signature.pdf>

d. Personnel Management

- Describe the actions that have been taken or that will be taken to ensure that LSD has the policies, practices, and resources in place to ensure equitable and inclusive personnel practices that support effective recruitment and retention of staff, including policies and processes for hiring staff; ensuring staff have completed all required background checks in accordance with the law; and that all positions that require professional licensing meet current licensing requirements while employed by LSD.

LSD is following personnel policies and practices currently being used in MAUSD and that will be adopted by LSD, including those governing the hiring of new staff. Since all LSD staff will technically be "new hires," all are undergoing the requisite background checks and all of these employees meet professional licensing requirements. In the

coming year, LSD will work with LCS staff and administrators to identify any potential areas of concern, particularly related to equity and inclusivity, and address them in new or revised policies and/or through staff training. Personnel policies will be reviewed by LSD legal counsel as necessary. A requirement for both the Business Manager and Superintendent positions is experience with personnel policies and practices.

e. Data Management

- Describe the actions that have been taken or that will be taken to ensure LSD's efficient and purposeful data collection, use, and sharing, including providing the Agency of Education with accurate and timely data, as required, using a single Student Information System for educational records that meets interoperability requirements specified by the Agency of Education; and purposefully using data to identify needs, evaluate programs, and communicate with the community.

Student information and data collection will be managed through the Power School Student Information System platform which has already been implemented in LSD and which LSD staff are already trained use. LDS currently has access to all Lincoln student information, while MAUSD will maintain access until June 31, 2023. The system is configured to meet interoperability requirements specified by the AOE.

Metrics to evaluate programs and student performance and data will be gathered and tracked using summative, informative assessments developed by LSD along with State and Federally required assessments. Data will used to identify needs, evaluate programs, and will be shared with the community through the LSD Annual Report and other existing communication vehicles.

- Describe how the district will comply with records management requirements of FERPA and the Vermont State Archives and Records Administration (VSARA).

LSD has a FERPA policy in place and LCS staff have received and will continue to receive annual FERPA training. Access to student and personnel records in PowerSchool and Tyler Tech will be limited to the District Confidential Administrative Assistant and/or relevant District personnel who require access to this information. Hard copies of student and employee records will be housed in the District office locked in fireproof file cabinets with access to the files managed by the Confidential Administrative Assistant. Central Office staff will ensure hard copy and electronic files are held for the required amount of time based on the Special Records Schedule for Supervisory Unions (SRS-1897) updated by the VSARA on 12/16/2021.

f. Employee contracts, payroll, benefits, tax withholding and insurance

- Describe the actions that have been taken and that will be taken by LSD to develop new employee contracts (including transition of existing staff) for each employee group.

LSD and MAUSD agreed on a timeline for LSD to issue Intent to Return Forms, followed by contracts to returning staff sufficiently in advance of MAUSD's timeline. Intent to Return Forms were issued the first week of April and are due back April 19. Contracts will be sent to returning staff by May 1.

Contract negotiations between LSD, the VTNEA and the LSD bargaining units were concluded the week of April 10th and contracts for both teachers and support staff will be ratified the week of the April 17th.

Describe the steps that have been taken or that will be taken to (a) implement the systems and processes necessary to manage payroll, benefits, insurance, tax withholding, union dues, and voluntary and other deductions for all employees; and (b) implement time-tracking and absence management systems.

The accounting/payroll module of the Tyler Technologies School ERP will be used to manage payroll, benefits, insurance, tax withholding, union dues, and voluntary and other deductions for all employees. The HR module will be used to manage time-tracking and absence management,

Describe the planned organizational structure for the employees who will be responsible for providing central office leadership and support, including those responsible for district administration, special education, transportation, and business and data management. The update should describe steps that have been taken and that will be taken to develop job descriptions and to recruit and hire central office staff. Please indicate the positions for which LSD has commitments from staff as well as the positions that the district has yet to fill.

- Describe the planned organizational structure of the employees who will be responsible for operating the school for the grades to be operated, including those responsible for administration, instruction, special education and student support services, food service, maintenance and plant management. The update should describe the steps that have been taken and that will be taken to develop job descriptions and to recruit and hire staff. Please indicate the positions for which LSD has commitment from staff as well as the positions the district has yet to fill. For positions not yet filled, the update should describe how staff will be recruited and the timeline for doing so.

See Attachment E for an organizational chart of the Lincoln School District, including the Central Office and the Lincoln Community School. Job descriptions exist for all positions.

To-date, two current LSD staff have indicated they will not return – a .2 FTE guidance counselor and a 1.0 FTE kitchen support staff. The guidance counselor position will be filled through a subcontract and the kitchen staff position will be posted the week of April 24.

All new positions have been filled except for the .5 Business Manager, although negotiations are currently underway with a candidate for the position.

Services for Facility Maintenance, Technology Support and Speech Pathology will be contracted. A provider for Speech Pathology has been engaged, interviews with potential technology providers are underway, and the Facilities Committee is developing a Scope of Work for those services.

LSD initiates recruitment at the local level with open positions posted on Front Porch Forum and circulated through word of mouth and specific outreach. When this does not provide a strong candidate pool, positions are posted on SchoolSpring and other recruitment vehicles with a more specific geographical reach (ie, the Addison Independent and the Vermont 802 newsletter).

Within the Lincoln Community School, the positions titles reflect the responsibilities of the position. At the Central Office level, the Business Manager (with the support of the Confidential Administrative Assistant) is responsible for, among other things, Finance and HR management, Food Service Operations, purchasing, and contracts and work of external service providers for Facilities Maintenance and Technology.

The Special Services Director is responsible for managing and ensuring the appropriateness and adequacy of special education and special education services, data management and reporting, subcontracts and the work of external service providers, and is the LEA of students requiring special education services in Gr 7-12. The Superintendent, among other things, is responsible for District management, central office leadership and supervision, supervision of the principal, staying apprised of AOE regulations and initiatives related to Education Quality Standards, monitoring legislation that may impact LSD operations, and development of data-driven continuous improvement plans.

The Confidential Administrative Assistant will support the work of the above district staff and be responsible for implementation and oversight of specific administrative tasks related to purchasing, universal pre-K, LSD enrollment, contracts with external service provider, and others.

- Describe how LSD's staffing plan will ensure that the consultative and direct services required in students' IEPs and 504 plans will be provided by LSD.

LSD staffing includes a .5 FTE special educator dedicated to the Lincoln Community School and a .5 FTE District Special Services Director dedicated to ensuring the consultative and direct services required in Student IEPs and 504 plans are provided. The Special Educator has been working in LSD for over 10 years and has strong relationships with students, parents, teachers and service providers that drive the consultative process. When necessary, student assessments will be conducted by the Counseling Services of Addison County. Students eligible for special education

services that cannot be met by in-school district will be provided through a contract with the Counseling Services of Addison County (CSAC) or other service providers.

3. Transfer of Resources & Records from MAUSD

- Describe how responsibility for ongoing management of the physical plant that will serve as the school for the grades operated will be transferred to LSD. This should include details of actions that have been taken or actions that will be taken to transfer ownership of the school building and transfer and/or acquire maintenance and support agreements (e.g., sanitation, building maintenance, grounds maintenance, HVAC maintenance, water quality testing, information technology support, and insurance policies).

Transfer of the school building to LSD is part of the Withdrawal Agreement between MAUSD and LSD, which was approved by all towns in MAUSD in March 2023 elections. Legal counsel for LSD and MAUSD will determine the administrative process by which to execute the transfer, which will occur on or before July 1, 2023. LSD has initiated paperwork with the Vermont Municipal Bond Bank to assume the bond debt on the building by July 1, 2023.

Transfer of contracts from MAUSD to LSD for facility maintenance and support services has begun and will continue throughout the summer. In many cases, direct relationship already exists between LSD and the providers. The LSD Business Manager and Superintendent, with support from the Confidential Administrative Assistant, will be responsible for reviewing, re-negotiating and/or entering into new contractual relationships.

The LSD Facilities Committee is reviewing maintenance documentation received from MAUSD to develop a maintenance plan, prioritize a capital improvement plan, develop a Scope of Work for a facilities maintenance contractor, and implement the hiring process of that contractor. Potential contractors have been identified.

- Describe actions that have been taken or that LSD will take to transfer student records and transition students' IEPs and 504 plans.

Student IEP and 504 plans will be maintained in EdPlan, the same program used by MAUSD. LSD has a negotiated contract and implementation plan with EdPlan and transfer of all data will occur no later than July 1, 2023.

4. Adoption & implementation of policies and procedures

- Describe the actions that have been taken and that will be taken to ensure that all policies and procedures mandated under state and federal law that are applicable to SU/SDs and schools are identified and the steps that have been taken or will be taken for the new district to develop, review, adopt and implement these policies and procedures.

See Attachment F for the list of approved/adopted policies, a list of those pending approval and adoption, and a timeline to complete the process of adopting policies and procedures mandated under state and federal law. Language provided by the VSBA and/or approved policies from other districts serves as the starting point for LSD-specific policies. LSD priorities follow guidelines provided by the Vermont School Board Association for mandatory policies while also including policies identified by LSD as essential to district start-up, such as those related to kindergarten entrance, school choice, tuitioning students to out-of-district schools, and admission of non-resident students. All mandatory and operationally relevant policies will be in place by July 1, 2023 and policy work will continue over the summer,.

- Describe the actions that have been taken and that will be taken to review and verify LSD's compliance with Vermont's Education Quality Standards (State Board Rule Series 2000 requirements and responsibilities set forth in Rule 2120.6 (Curriculum Coordination); Rule 2021.3 (Needs Based Professional Learning); Rule 2021.5 (Tiered System of Support); Rule 2023 (State and Local Comprehensive Assessment System); Rule 2121.4 (Staff Evaluation); and Rule 2122.2 (Access to Instructional Materials).), prior to July 1, 2023. In particular, the update should address the

The Lincoln Community School has been meeting or exceeding Educational Quality Standards prior to and since becoming part of MAUSD (2016 and 2018 AOE EQS assessments). LSD will maintain the staff and systems to continue to meet these standards and hopes the AOE will conduct Educational Quality Reviews at its earliest convenience to allow the District to use information from the Annual Snapshot and Integrated Field Assessment to establish benchmarks and develop continuous improvement plans. <https://education.vermont.gov/education-quality-assurance/education-quality-reviews>

2120.6 LSD will not be part of an SU/SD for curriculum coordination but will continue to use the MAUSD-developed curriculum into the coming year while exploring potential changes.

2021.3 As part of MAUSD, LSD staff were involved in the creation of robust, needs-based professional development plans. These plans will be adjusted/refined to meet LSD-specific needs and priorities. LSD has requested LSD staff be able to participate in relevant MAUSD-sponsored professional development initiatives on a fee-for-service basis. Staff professional learning needs are identified by self-reporting, student outcome data, observation, and staff assessments. This is a responsibility of the Superintendent and the Principal.

2021.5 The Lincoln Community School currently provides tiered systems of support for students in line with the size and needs of its student populations (ie. special education, positive behavior coach, guidance counselor, speech pathologist, nurse) and has budgeted to continue to provide, and evolve as needed, these supports utilizing in-

school staff and/or contracts with outside agencies. This is the shared responsibility of the Superintendent, Principal, and Special Ed Director.

2121.1 LSD has and will continue to administer assessments of student performance using methods developed by the State Board of Education under 16 V.S.A. §164 and shall account for 100% of its student in regard to their participation in the state assessments. This is the responsibility of the school Principal.

2121.2 The Lincoln Community School library is available to classes and individual students on a regular basis (scheduled and unscheduled) throughout the week. Its resources are regularly refreshed with print and digital resources that align with the student and teacher needs and interests. LCS has access to high-speed internet and each student has a designated Chromebook and each teacher a designated computer. Individual teachers, with the support of the librarian, work to incorporate the use of technology into the curriculum, including for research, as teaching aids, and for staff professional development. LCS has any existing policy on appropriate internet use for students and teachers,

2121.4 LSD will use the MAUSD staff evaluation methodology in the coming year, which includes the elements listed in Rule 2121.4 while identifying ways to adapt the process for the culture and circumstances of the district.

5. Facilities Management & Safety

- Describe the actions that have been taken and that will be taken by LSD to ensure that the facilities for which LSD is responsible are adequately maintained and cleaned and the plans necessary to ensure current and future operations, including: (a) maintaining a comprehensive school facilities Operations and Maintenance Manual (OMM) for each building/facility LSD operates; and (b) ensuring that educational and program facilities are accessible, clean, safe, secure, well-lit, well-maintained, and conducive to student learning, including have adequate access to technology.

The Lincoln Community School will employ a full-time custodian responsible for ensuring the cleanliness and daily functioning of the school building. Based on information received from MAUSD and inspections by VSBIT and relevant maintenance service providers, the Facilities Committee is developing a building maintenance schedule and 5-year capital improvement plan.

LSD will adopt relevant aspects of the MAUSD Operations and Maintenance Manual to create its own manual.

- Describe the steps that have been taken or will be taken to ensure that the facilities for which LSD is responsible are safe and that there is an Emergency Operations Plan (EOP) in the format prescribed by the Agency of Education, that each building/facility has adopted an appropriate and layered approach to physical

security to ensure that the facility is safe and secure; and that all staff are trained in emergency operations, including threat assessment protocols.

Lincoln Community School staff have been and will continue to be trained on emergency operational procedures and the school has its own emergency operations plan. Training will continue on an annual basis and the plan will be reviewed and updated as necessary in the coming year, guided by resources provided by the VT AOE (<https://schoolsafety.vermont.gov/planning/school-emergency-operations-plan>) and risk assessments provided by VSBIT. LSD will also access emergency and risk management training available through VSBIT.

- Describe the steps that LSD has taken or will take to develop a five-year Capital Improvement Plan (CIP) for each building or other facility for which it is responsible.

LSD will use current the MAUSD 5-year capital improvement plan for the Lincoln Community School which goes through FY25, a review of relevant maintenance and facility assessment documents, and inspections of the facility and its systems by the LSD Facilities Committee, relevant service providers of LCS's physical infrastructure (ie. water system, back-up generator, heating system, security system). VSBIT will conduct a safety/security assessment and make recommendations for improvements in the school accordingly.. This process will be completed during LSD's first year of operation allowing LSD to develop an FY25-FY29 Capital Improvement Plan,

- Identify the person whom LSD will designate as responsible for facilities management and the necessary training and certification that this individual has or will receive to ensure compliance with standards.

The LSD Facilities Committee is in the process of developing a Scope of Work for sub-contracted facilities management services and support, which includes required certifications and skills, and for identifying and contracting for with potential providers of these services. The deadline for engagement of a facilities maintenance service provider is June 15.

6. Food Service & Transportation

- Describe how food service will be provided at the school (for grades operated) and the actions that have been taken or that will be taken to develop and implement LSD's school food program in compliance with 16 VSA §1264 *et seq.*

LSD will implement its own food service program and is working with the AOE Child Nutrition program to implement all necessary accreditation, personnel training, and data management and reporting infrastructure is in place and in compliance with 16 VSA 1264 by the start of the schoolyear. The newest LSD Board member was the LCS Food Program Manager from 2014-2017 and will leading this effort with support from the current LSD food program manager (who will run the program in FY24), the MAUSD Food Program Director, and the South Burlington District Food Program Director.

- Describe the plans to develop a transportation policy, including whether transportation will be provided to students and, if so, how it will be provided for students in each grade. The plans should be specific about what transportation options will be provided, including for students with individualized educational programs or 504 plans who require specialized transportation. The update should identify any student populations that will not be offered transportation and the rationale for this decision.

The LSD Transportation Policy ensures transportation for students attending the Lincoln Community School and Mt Abraham Middle/High School (where 80-85% of Lincoln gr 7-12 students are expected to attend). LCS will not provide transportation for students in grades 7-12 attending other out of district schools due to extremely low numbers and prohibitive cost. Depending on circumstances, however, Lincoln may initiate discussions and work with other schools to identify transportation options for Lincoln students.

LSD will comply with all federal statutes around non-discriminatory access to school as documented in LSD approved policies concerning Transportation and Special Education.

Lincoln has issued an RFP for district transportation services, the bids of which are due May 19.

7. Risks & Contingency Planning

The State Board also asks LSD to identify and describe risks that could threaten its ability to become fully operational by July 1, 2023. For each identified risk or issue, LSD's update should describe actions that LSD will take to mitigate the risk or resolve the issue, including a contingency plan of actions that LSD will take if it is not ready to operate by July 1, 2023.

Risk 1: LSD is not able to complete a timely implementation of the Food Service program by July 1.

Risk Mitigation 1: LSD will purchase food services from a vendor until the Food Program is up and running. Research is underway for vendor options.

Risk 2: LSD is not able to fill the Business Manager position by July 1.

Risk Mitigation 2: The current LSD financial consultant, a former VT SU/SD business manager, has committed to filling this vacancy until an employee is hired.

LSD does not foresee any circumstances that would not allow it to not be prepared to be fully operational by July 1, 2023. In this highly unlikely event, LSD tuition all of its students to out-of-district schools.

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STRENGTHS

- Supervision and Evaluation
- Commitment to promoting quality education within public schools
- Excellent communication skills including mediation, negotiation and conflict resolution
Planning and organizational skills for long short term projects
- Work ethic

EDUCATION TRAINING

- 2004-2005 VELA-Vermont Education Leadership Alliance
- 2000-2002 Snelling Institute-Vermont Leadership Project
- 1996 M.Ed Special Education/Administration, University of Vermont
- 1994 B.S. Education Southern Connecticut State College, New Haven, CT

PROFESSIONAL EXPERIENCE

Special Services Director @ SAU 75, Grantham, NH 2018-2022 (retired)

Job responsibilities:

- Compliance with IDEA, the Rehabilitation Act and ADA for all Grantham children, age 3-22, in public and private schools
- Training and implementation/investigation of harassment of students and/or staff
- Committee work across two years for SRS (safe return to school) and MTSS development in alignment with IDEA
- Fiscal management and responsibility
- Active member of the Progress Monitoring Committee and a joint disciplinary team examining data around students growth and staff well-being during pre and post Covid
- Alice Training 2018-2022
- Mentoring new hires in special services
- Grants Management/Budget Development

Special Education Director (part-time, as needed), Croydon School District, Croydon NH, 2020-2022 (retired)

Assistant Superintendent for Pupil Services, Windsor Southeast SU, Windsor, VT, 2006-2018

Job Responsibilities:

- Coordination of all student services
- Budget development
- Grants/ curricular coordination for all staff at all levels
- Acting Superintendent (as necessary)
Board meetings and board presentations
- Data analysis and progress monitoring
- External coach for School Improvement Grant

- School Improvement Coordinator
- Supervision and evaluation
- Systems/organizational restructuring
- Compliance Officer,
- Title 1 Supervisor,
- Homeless Liaison,
- Ell Coordinator Recruitment,
- Training and staff retention, including coordination of mentors
- Assure HQT staff-professional and non-professional staff

**Director of Student Services, Windsor Southeast Supervisory Union, 2003-2005
with on-going consulting 2006**

Job Responsibilities:

- Student services,
- Grants management
- Gudget development
- Supervision and evaluation of staff
- ECP Coordinator
- Title 1 Supervisor

Director of Student Services, Rutland Central Supervisory Union 1998-2003

Job Responsibilities:

- Student services
- ECP coordinator
- Supervision of Home School Coordinators
- Out-of-district LEA,
- grants management,
- budget development,
- Title 1 Supervisor

Director of Student Services, Addison-Rutland Supervisory Union, 1996-1998

Job Responsibilities:

Student services
grants management
budget development, ECP
alternative education programming
Title 1 Coordinator

Integration Facilitator, Rutland Central Supervisory Union, 1993-1996

Job Responsibilities:

- Support, supervise paraprofessional staff
- plan and implement program for Intensive Needs Program
- staff training and supervision

Owner Operator of Small Business. 1986-1988

Teacher Grades 3, 5, 7, Bridgeport, Connecticut 1974-1981

Trainings

- Research for Better Teachers – 2010-present
 - Skillful Administrators: Supervision and Evaluation
 - Skillful Administrators: Supervising the Mediocre
 - Thinking Maps
- External Coach Trainings for School Improvement Grant: 2010-Present
- Critical Friends: 2009
- Harassment/Bullying Training: 2006, 2007, 2008, 2009, 2010, 2011, 2012
- Negotiations, Mediation Training, Woodbury College: 2010
- Path Wise: 2010-2011

*List of additional **trainings** available upon request*

Brittany Gilman

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LEADERSHIP PROFILE

Results-driven and dynamic professional with hands-on experience in conducting high-level financial modelling and analysis. Extensive experience in governmental, municipal, and non-profit finance with a keen sense of awareness related to the responsibilities of being entrusted with public funds. Demonstrated expertise in driving project implementation and optimal financial performance across the organization, including establishing policies, aligning resources, and positioning for program achievement. Highly skilled at improving and building processes and communicating parameters of complex business transactions to a broad group of stakeholders. Recognized financial expert with solid record of contributions to improve financial performance, stakeholder relationships, and enhance internal controls.

EDUCATIONAL BACKGROUND

CPA Candidate

150+ hours coursework

Graduate Coursework

Southern New Hampshire University, Manchester, NH

Bachelor of Science, Business Management, Concentration in Accounting

Summa cum laude | *President's List of Distinguished Students* | *Sigma Beta Delta Business Honors Society*
Castleton University, Castleton, VT

PROFESSIONAL EXPERIENCE

Private Consulting

School Finance Consultant serving Vermont school districts
Consultant (2022 to Present)

RHR Smith and Company CPAs – Maine & Vermont, USA

Regional CPA firm servicing primarily governmental entities & non-profits
Director of Support Services & Audit Manager (2021 to 2022)

Report directly to Managing Partner. Oversee Support Services Department, including eight staff members. Plan and schedule audits and non-attest accounting services. Perform audits of governmental units, school districts, and non-profit entities, including yellow book and A-133 audits. Onboard new clients; establish and maintain client relationships. Prioritize workload for Support Services department. Remain abreast of new accounting policies, including GASB, FASB, and GAAP.

Addison Central School District – Middlebury, VT, USA

School District serving approximately 1700 students, \$40 million budget
Director of Finance and Operations (2018 to 2021)

Reported directly to Superintendent of Schools. Planned and executed capital projects from inception to completion while administering a budget of \$40M. Designed and implemented internal financial reporting systems, financial controls, and management information systems in coordination with staff while ensuring all company activities adhered to legal guidelines

Continued...

and policies. Facilitated annual audit with external auditors. Coordinated with Human Resource department to manage benefits. Delivered strategic leadership and guidance to staff regarding contract negotiation and preparation to achieve best pricing and services. Oversaw cash, cash-related receipts, accounts receivable, and accounts payable functions to ensure timely processing of billings, payments, and collection of program revenue.

Rutland Central Supervisory Union – Rutland, VT, USA

Supervisory Union and Three Member Districts, \$20 million budget
Business Manager (2016 to 2018)

Reported directly to Superintendent of Schools. Created and managed budget process for \$20M budget for Supervisory Union and three member districts. Developed and implemented policies and procedures to ensure efficient and safe operation of the unit. Oversaw payroll and accounts payable process with a keen focus on streamlining payroll processes. Optimized federal grants and awards while overseeing fund-raising, preparing progress reports, and ensuring compliance with grant regulations. Facilitated annual audit with external auditors to increase the value and credibility of the financial statements produced by management.

The Royal Group – Rutland, VT, USA

Regional security company
Accounting Manager (2013 to 2016)

Reported directly to Operations Manager. Forecasted revenue and expenditures to reduce company operating costs. Analyzed financial statements to determine profit margins and improve debt management. Managed collections process and supported change management by understanding and addressing impacts of new accounting policies.

Additional Experience:

Accounting Clerk (2012 to 2013) ▪ Town of Castleton, Castleton, VT. 15-25 hours per week
Bookkeeper (2014 to 2015) ▪ Clarendon Brick Church 10-15 hours per week

References available upon request

ANDY SOARES WHITE, MBA

3237 Ripton Rd • Lincoln, VT

Cell: (617) 686-0358 • andrew.j.soares@gmail.com

Collaborative finance and operations executive with nearly twenty years' experience leading complex higher education organizations toward achievement of substantial and demonstrable strategic and financial growth. Specific expertise in nonprofit risk and financial control management, data and visualization, and process redesign.

- Excellent financial analysis, troubleshooting, and reporting skills.
- MBA with a specialization in nonprofit financial and data management
- Strong communication skills, relationship management, and cultural awareness

HIGHLIGHTED LEADERSHIP EXPERIENCE

University Strategic Plan: Member of Boston University's 2030 Strategic Task Force charged by the University Provost with proposing the University vision and set of actionable priorities over the next decade.

Wheelock College Merger: Director of Coordination for the merger with Wheelock College. Responsible for coordinating the overall administrative merger efforts of Boston University with a \$20M college.

EXPERIENCE:

Soares White Consulting, LLC

8/21 – Present

Independent consultant providing strategy, finance, and technology expertise to non-profit clients.

Principal & CEO

- Strategy, finance and accounting engagements with various non-profit clients. Major projects include;
 - A business analysis and go-to-market strategy for a new academic center implementation at a major Boston area university.
 - An organizational structure review identifying areas of waste, improvement, and advancement opportunities to a growing college in the Boston area.
 - Provided ad-hoc finance, budget, and accounting consulting to small non-profits

Boston University (BU), Boston, MA

7/11 – 7/15 & 8/16 – 8/21

A leading private research institution with two primary campuses in Boston and programs around the world

Vice President and Assistant Treasurer, Finance Operations

11/19 – 8/21

- Key member of the BU executive team responsible for all University finance operations and support. Reporting directly to the Senior VP, CFO, & Treasurer.
- Provided direct oversight of several finance departments with a total staff of 60 and a budget of \$40M
 - Post Award Financial Operations: University's research accounting, compliance, and post award management systems responsible for oversight of over \$400M in grant expenditures
 - Internal Audit & Advisory Services: University's audit and compliance function.
 - Continuous Improvement & Data Analytics: Finance internal consulting and data analytics support department.
- Established the Office of Continuous Improvement & Data Analytics to provide the Finance Department with more timely, reliable, and valuable data and data management.
- Assistant Treasurer responsible for the oversight and support of the University's cash position (>\$400M) and the University's debt portfolio (\$1.6B).
- Presented to numerous executive committees including the Board of Trustees, Executive Leadership, and University Council.

Chief Audit Executive, Associate Vice President, Internal Audit & Advisory Services

8/16 – 10/19

- Directing a staff of 14 employees and a budget of \$1.2M in developing and executing the annual Audit & Advisory Services plan, including compliance reviews, advisory value-add projects, data analytics programs, investigations, and information technology reviews.
- Developed and implemented a continuous improvement operation within the Advisory Services function that utilizes recognized frameworks such as Lean Six Sigma and Kaizen methodologies to build a culture of continuous improvement at the University and find efficiencies in major processes.
- Reporting directly to the Audit Committee of the Board of Trustees and Senior VP, CFO & Treasurer. Extensive presentation and speaking experience to all levels of University leadership, management, and staff.

Earlier Positions; Interim Co-Director Internal Audit, Assistant Director IT Audit, Supervisor IT Audit, Program Manager Sponsored Programs

7/11 – 7/15

ANDY SOARES WHITE, MBA

3237 Ripton Rd • Lincoln, VT

Cell: (617) 686-0358 • andrew.j.soares@gmail.com

- Independent Consultant, Lusaka, Zambia 8/15 – 6/16
Involved in finance, operations, and IT consulting projects for small and medium sized enterprises in Lusaka
Private Enterprise Program Zambia (PEPZ) 11/15 – 6/16
- Assisting the Business Development Services team in executing grant funding, grant management responsibilities, and project quality assurance reviews.
- Zambian Center for Applied Health & Research Development** 9/15 – 6/16
- Consulting on a major implementation of a financial system (SAGE)
- PricewaterhouseCoopers (PwC), Boston, MA & Sydney, Australia 7/04 – 9/09
Manager, Systems Process Assurance (SPA)
Earlier Positions; Senior Associate, Associate
The world's largest professional services organization headquartered in London, United Kingdom.
- Managed teams in the completion of operational and IT audit reviews for multiple clients ranging from Fortune 500 companies to small start-ups with varying environments.

EDUCATION:

- Boston University, Questrom School of Business, Boston, MA
Master of Business Administration, High Honors 5/15
Dual Concentration: Nonprofit & Public Management, Leadership & Organizational Transformation
- Bentley University, Waltham, MA
Bachelor of Science, Honors Program 5/04
Major: Computer Information Systems, Minor: International Studies

VOLUNTEER POSITIONS:

- Lincoln Sports, Lincoln, VT 11/22 – Present
Treasurer
- Bird Street Community Center (Uphams Corner Community Center), Dorchester, MA 7/14 – 11/20
Board Chair
- Supporting Kids in Peru (SKIP), Trujillo, Peru 1/10 – 1/11
Manager, Economic Development

CERTIFICATIONS/RECOGNITIONS:

- Lean Six Sigma Green Belt Certified, April 2019
Certified Internal Auditor (CIA) Certified, October 2016
Boston University Leadership Development Program Graduate, 2014-2015
Beta Gamma Sigma Inductee, May 2015

TECHNOLOGY SKILLS:

- Highly capable in Excel and Power BI. Also with significant experience in SAP FICO, SAP HCM, SAP GRC, ACL, Microsoft Word, PowerPoint, Tableau, SharePoint

RELEVANT GRADUATE OR LEADERSHIP PROGRAM PROJECTS

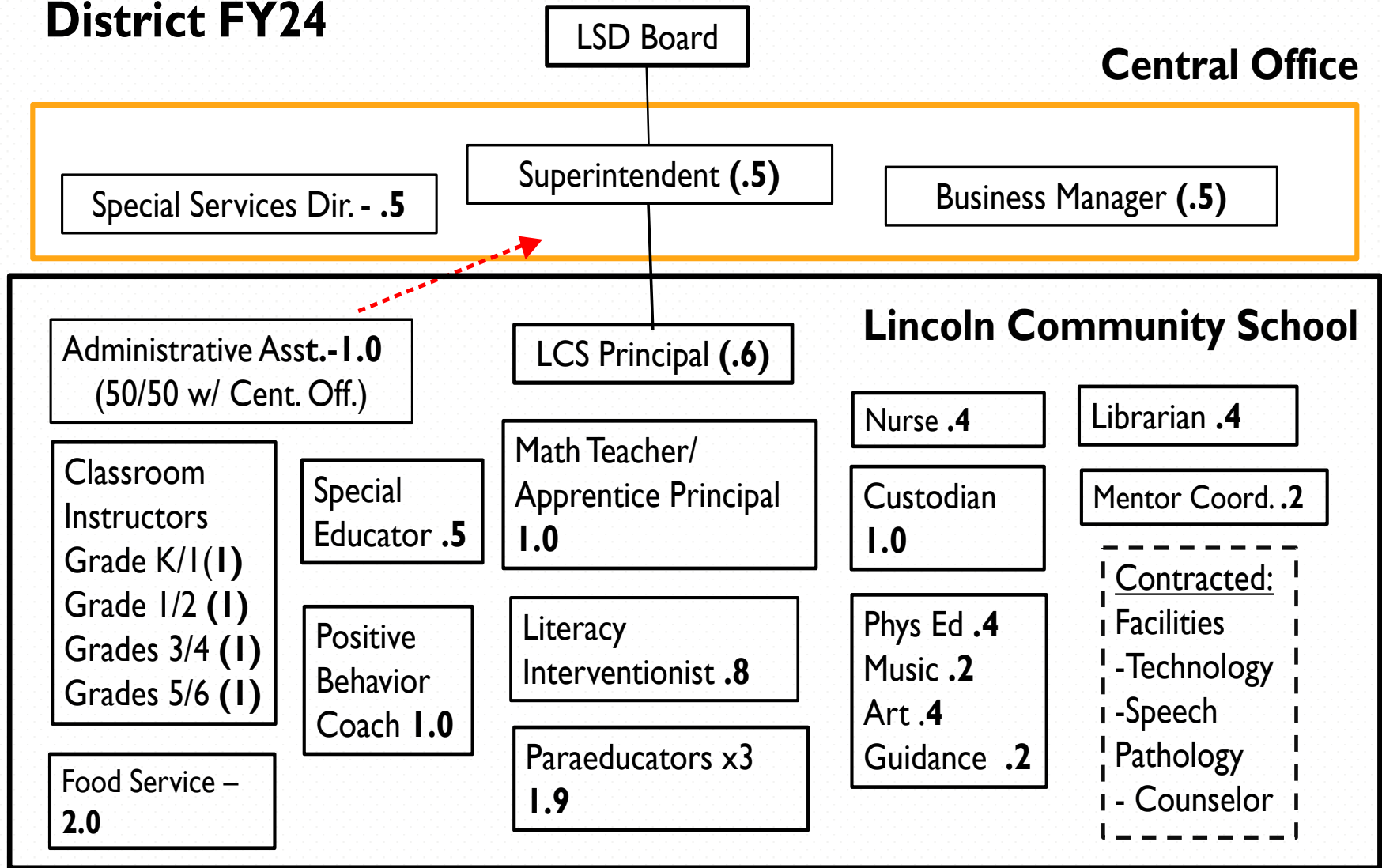
- Citizen Schools New Product Development Business Plan, 5/2015.* Developed a go-to-market strategy for a new product scaling Citizen Schools apprenticeship model nationally as part of a graduate program.
- Bird Street Individual Donor Plan, 12/2014.* Developed a comprehensive individual donor plan to double contributions in a three-year timeframe as part of a graduate program.
- BU Community College Initiative, 5/2015.* Capital project set by executive leadership at BU to research the possibility of articulation agreements with Community Colleges as part of the BU Leadership Program.

Attachment D1			
Lincoln School District			
FY24 Budget Summary			
Administration	387,458		Tax Rate Calculation
Advertising/Recruitment	4,000		Expenditures
Board Expenditures	5,000		Revenue
Contingency - Other	40,000		Education Spending
Dues and Fees	750		Equalized Pupils
General Legal Fees	25,000		Education Spending/EQP
Insurance (W/C, Liability)	22,000		Property Yield
Miscellaneous	2,000		Equalized Tax Rate
Supplies	4,750		CLA
Treasurer	1,000		Adjusted FY24 Tax Rate
Wages and Benefits	282,958		FY23 Tax Rate
Athletics and Extracurricular	47,002		Difference
Athletics and Extracurricular (inc. wages/benefits)	47,002		Increase over FY23
Facilities	249,499		
Supplies, Equipment, Purchased Svc	110,000		
Utilities	75,000		
Wages and Benefits	64,499		
Fiscal Services	211,767		
Audit	12,000		
Debt Service	144,851		
Wages and Benefits	54,916		
Food Service	125,000		
Food Service Support	125,000		
Guidance	23,068		
Dues and Fees	750		
Purchased Services	5,000		
Supplies	1,500		
Wages and Benefits	15,818		
Library	6,750		
Dues and Fees	750		
Supplies	6,000		
Wages and Benefits	0		
Nurse	38,347		
Dues and Fees	750		
Supplies	6,000		
Wages and Benefits	31,597		
Regular Education - Classroom Instructions	2,893,107		
Dues and Fees	2,000		
Professional Development	30,000		
Purchased Services	20,000		
Supplies	12,000		
Tuition - Contingency	40,000		
Tuition - Secondary	1,851,700		
Universal PK	93,900		
Wages and Benefits	796,507		
Extended Learning Program	47,000		
Special Education	241,491		
Excess Costs	100,000		
Legal Fees	3,300		
Professional Services	25,000		
Supplies	5,000		
Wages and Benefits	108,191		
Student Support, Regular Education	31,000		
Other Purchased Services	31,000		
Tech Center	118,500		
Tech Center Tuition	118,500		
Technology	80,000		
Technology	80,000		
Transfers	20,000		
Transfer to Reserves	20,000		
Transportation	160,000		
Transportation	160,000		
Mentor Program	12,140		
Wages and Benefits	12,140		
Grand Total	4,645,130		

Attachment D2		LSD FY24 Detailed Budget	
Revenues:			
Function	Function Description	Details	Amount
4300	Rev - State	Small Schools Grant	115,000
4400	Rev - Federal	Forestry Revenue	6,000
4100	Rev - Local	Interest Income	200
4100	Rev - Local	Rental Income	3,000
4100	Rev - Local	Misc. Income	2,500
4300	Rev - State	Transportation Aid	43,500
4300	Rev - State	Special Education Block Grant & Extraordinary Reimbursement	137,250
4100	Rev - Local	Extended Learning Program Fees	26,000
4400	Rev - Federal	Grant Income	60,000
4100	Rev - Local	Payment from MAUSD	74,753
		Total Revenues	468,203
Expenditures:			
Function	Function Description	Account Description	Amount
1100	Regular Education - Classroom Instructions	Wages and Benefits	796,507
1100	Regular Education - Classroom Instructions	Purchased Services	20,000
1100	Regular Education - Classroom Instructions	Supplies	12,000
1100	Regular Education - Classroom Instructions	Dues and Fees	2,000
1100	Regular Education - Classroom Instructions	Extended Learning Program	47,000
2200	Guidance	Wages and Benefits	15,818
2200	Guidance	Purchased Services	5,000
2200	Guidance	Supplies	1,500
2200	Guidance	Dues and Fees	750
2300	Nurse	Wages and Benefits	31,597
2300	Nurse	Supplies	6,000
2300	Nurse	Dues and Fees	750
2000	Student Support, Regular Education	Other Purchased Services	31,000
2220	Library	Wages and Benefits	0
2220	Library	Supplies	6,000
2220	Library	Dues and Fees	750
2400	Administration	Wages and Benefits	282,958
2400	Administration	Supplies	4,750
2400	Administration	Dues and Fees	750
2500	Fiscal Services	Debt Service	144,851
3100	Food Service	Food Service Support	125,000
1100	Regular Education - Classroom Instructions	Universal PK	93,900
1300	Tech Center	Tech Center Tuition	118,500
1100	Regular Education - Classroom Instructions	Professional Development	30,000
2230	Technology	Technology	80,000
2400	Administration	Treasurer	1,000
1100	Regular Education - Classroom Instructions	Tuition - Secondary	1,851,700
1100	Regular Education - Classroom Instructions	Tuition - Contingency	40,000
1400	Athletics and Extracurricular	Athletics and Extracurricular	47,002
1400	Mentor Program	Wages and Benefits	12,140
2600	Facilities	Wages and Benefits	64,499
2600	Facilities	Utilities	75,000
2600	Facilities	Supplies, Equipment, Purchased Svc	110,000
2400	Administration	Miscellaneous	2,000
2700	Transportation	Transportation	160,000
2500	Fiscal Services	Wages and Benefits	54,916
2400	Administration	Board Expenditures	5,000
1200	Special Education	Wages and Benefits	108,191
1200	Special Education	Legal Fees	3,300
1200	Special Education	Supplies	5,000
1200	Special Education	Professional Services	25,000
1200	Special Education	Excess Costs	100,000
2400	Administration	Insurance (W/C, Liability)	22,000
2400	Administration	Advertising	4,000
2500	Fiscal Services	Audit	12,000
2400	Administration	General Legal Fees	25,000
2400	Administration	Contingency - Other	40,000
2999	Transfers	MAUSD Transfer to Reserves	20,000
		Total Expenses	4,645,130

Attachment E

Lincoln Supervisory District FY24



Policy and Procedure Timeline UPDATED – April 13, 2023
[VSBA Model Policy Manual](#)

1.

June-July 2022	<ul style="list-style-type: none"> ● Board reviews VSBA policies related to Board Operations ● Board determines to adopt policies that include gender neutral language ● Board adopts the following policies using the VSBA policy adoption process <ul style="list-style-type: none"> ○ Board Member Conflict and Interest A1 ○ Community Engagement and Vision A23
July-August 2022	<ul style="list-style-type: none"> ● Board reviews required VSBA policies
October 2022	<ul style="list-style-type: none"> ● As needed, based on SU assignment, board reviews policies of the supervisory union in order to determine whether any additional non-required policies need to be adopted for alignment
October 17, 2022	<ul style="list-style-type: none"> ● Board approves and warns the following policies using the VSBA policy adoption process : <ul style="list-style-type: none"> ○ B1, B2, B3, B4, B5, B7
October 24, 2022	<ul style="list-style-type: none"> ● Board approves the following policies using the VSBA policy adoption process : <ul style="list-style-type: none"> ○ C1, C6, C7, C8
November 14, 2022	<ul style="list-style-type: none"> ● Board warns the following policies: C1, C6, C7, C8
November 28, 2022	<ul style="list-style-type: none"> ● Board votes to adopt C1, C6, C7, C8 ● Board reviews the following policies using the VSBA policy adoption process: <ul style="list-style-type: none"> ○ C9, C10, C11, C12, C13
January-February 2023	<ul style="list-style-type: none"> ● Board votes to adopt required policies C3, C10, C11, C12, C13, C14, C15 using the VSBA policy adoption process ● Board adopts the following policies using VSBA policy adoption process: <ul style="list-style-type: none"> ○ 7-12 Tuition ○ Admission of Resident Students ○ 7-12 School Choice policy ● Board reviews Kindergarten Entrance policy
March-April 2023	<ul style="list-style-type: none"> ● In progress: Board reviews, approves and adopts the following policies using the VSBA policy adoption process: <ul style="list-style-type: none"> ○ Required policies: D1, D3, D4, D5, D6, D7, F1, F2, B8 ○ Tuition of Non-Resident Students ○ Kindergarten Entrance
May-June 2023	<ul style="list-style-type: none"> ● Board reviews, approves, and adopts the following required policies using the VSBA policy adoption process: <ul style="list-style-type: none"> ■ C10P Prevention of Harassment and Bullying Procedures ■ C9 Nutrition and Wellness

	<ul style="list-style-type: none">■ C5 Weapons/Firearms■ E1 Title I Part A Parent and Family Engagement
Ongoing-Summer 2023	<ul style="list-style-type: none">● Board establishes procedures for implementation of relevant policies● Board adopts other policies needed for July 1 2023 operation