

**AGENCY OF EDUCATION**  
**Barre, Vermont**

**TEAM:** School Governance Team

**ACTION ITEM:** Will the State Board of Education find that the proposed unified union school district formed by all current member districts of the **ADDISON NORTHEAST SUPERVISORY UNION (ANESU)**, which asks to be its own supervisory district, is “in the best interests of the State, the students, and the school districts,” and will the State Board therefore vote to approve the attached report of the ANESU Study Committee?

**SECRETARY’S RECOMMENDED ACTION:**

**That the State Board of Education finds that the proposed formation of a new unified union school district by all member districts of the ANESU, which will be its own supervisory district, is “in the best interests of the State, the students, and the school districts” pursuant to 16 V.S.A. § 706c(b).**

**That the State Board of Education votes to approve the attached report of the ANESU Study Committee.**

**That the State Board of Education votes to approve the temporary assignment of the new unified union school district, if approved, to the ANESU for the purpose of receiving administrative and other transitional assistance. Assignment would be for the interim period beginning on the date on which the unified union school district becomes a legal entity pursuant to 16 V.S.A. § 706g and ending on July 1, 2018, and would not modify the governing structure of the existing system.**

**STATUTORY AUTHORITY:** 16 V.S.A. § 706c; Act 46 of 2015; Act 153 of 2010, Secs. 2-4, as amended

**BACKGROUND INFORMATION:** The ANESU consists of five towns and six school districts, each governed by its own board. The Bristol, Lincoln, Monkton, New Haven (Beeman), and Starksboro (Robinson) Elementary School Districts each operate an elementary school serving resident students through grade 6. All five elementary school districts are members of the Mount Abraham Union High School District for grades 7 through 12.

The ANESU Study Committee recommends creation of a unified union school district (New Unified District) that would be its own supervisory district. The Study Committee identifies all six districts as “necessary” to the proposal, pursuant to 16 V.S.A. § 706b(b)(1). It does not identify any district as “advisable.”

The combined average daily membership (ADM) of all districts within the ANESU for FY2016 is 1,583.

If approved by the State Board and the voters of each district, the New Unified District would be eligible for incentives and protections under Act 153, Secs. 2-5, both because it would be a unified union district formed by the merger of four or more existing districts and, independently, because it would have a combined ADM of at least 1,250.

The New Unified District, which would be known temporarily as the Addison Northeast Supervisory District, would provide for the education of all resident PK-12 students by operating one or more schools for each grade. The proposal would unify all existing school districts and the supervisory union into a single supervisory district responsible for operating five elementary schools and one secondary school. It would replace these seven current governing bodies with one unified union school board.

The New Unified District would be governed by a 13 member school board. Board members would be nominated by and from among the electorate of the individual towns, with the number to be nominated by a single town being closely proportional to the fraction the town population bears to the total population of the New Unified District and calculated by the “largest remainder” method. Election of board members would be by the electorate of the town to which the board seat was apportioned.

A currently operating elementary school building could not be closed during the first four years of the New Unified District’s existence. After the initial four years, closure of an elementary school building would require approval of both the New Unified District’s school board and the electorate of the municipality in which the building is located.

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

The electorate of each potentially merging district will vote on November 8, 2016 whether to approve creation of the New Unified District. If the voters in each of the districts vote in favor of the proposal, then the New Unified District will begin operation on July 1, 2018.

The ANESU report includes 31 pages of appendices, the majority of which are tables and charts that informed the Committee’s analysis and proposal. These appendices concern issues such as enrollment trends, student-teacher ratios, elementary school program comparisons, school assets and debts, tax rate comparisons and projections, and other financial data, including estimated cost savings.

The report explicitly addresses concerns raised by members of the Committee and by the community at large. The proposal includes a “Minority Report” submitted by three members of the Committee and concludes with the Committee’s “Closing Thoughts.”

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

**EDUCATION IMPLICATIONS:**

The analysis of current collaborative efforts and the evaluation of a wide-range of issues, such as enrollment trends and elementary-level offerings, led the ANESU Study Committee to conclude: “Unification itself will not guarantee results. Rather, it will provide a structure designed to support clearly articulated goals and objectives all aimed at the same positive outcome.” The Committee identified a range of potential educational benefits of merger, including:

1. The flexibility to address (a) inequities in program offerings among the SU’s elementary schools, including the availability of Expanded Learning Opportunities; (b) inequities in class sizes and staffing; and (c) potential future needs, such as additional fine arts programming or materials and training in vocabulary instruction.
2. The ability to coordinate technology support personnel and to pool expertise to coordinate technology integration.
3. The elimination of bureaucratic redundancies and centralization of supports so that administrators are able to focus on their roles as educational leaders.
4. The flexibility to retain talented staff in whom the district invests time and professional development.

**FISCAL IMPLICATIONS:**

The ANESU already has centralized services and operations for prekindergarten, food service, bulk purchasing, special education, transportation, and other functions. In addition, the supervisory union includes a union high school district of which all five towns are members. Therefore, large initial savings from consolidation of services and operations are not to be expected because many of these savings have already been realized. Nevertheless, the ANESU Study

Committee identified an additional \$140,000 in potential annual cost reductions related to auditing, board, and legal services. In addition, the Study Committee's report anticipates other potential cost reductions resulting from the formation of a unified union through, for example, sharing custodial staff among schools for special projects rather than hiring outside vendors. The Study Committee reports that it does not expect significant changes in staffing levels upon merger because student to teacher ratios are already above the state average. *See also* Act 153, as amended, for cost implications to the State.

*See* the Study Committee's Worksheet for an overview (with page references) of those elements in the proposal that address the goals identified by Act 46, Section 2 and the potential for geographic isolation. In addition, a more detailed discussion of these elements appears on pages 7-12 of the Study Committee's Report and in Appendices B through E.

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

**STAFF AVAILABLE:** Donna Russo-Savage, Principal Assistant to the Secretary,  
School Governance  
Brad James, Education Finance Manager  
Bill Talbott, Chief Financial Officer

**UPDATED SEPTEMBER 1, 2016**

## Study Committee Worksheet for All Phases of Voluntary Merger

*Please submit this to the Agency with the Study Committee Report*

Current Supervisory Union or Unions (list each)	Potentially Merging Districts Pursuant to 16 V.S.A. § 706b(b)(1)-(2) (list each)	Is the District:	
		Necessary	Advisable
<b>Addison Northeast Supervisory Union</b>			
	<b>Bristol Elementary School District</b>	X	
	<b>Lincoln Community School District</b>	X	
	<b>Monkton Central School District</b>	X	
	<b>New Haven - Beeman Elementary School District</b>	X	
	<b>Starksboro - Robinson Elementary School District</b>	X	
	<b>Mt. Abraham Union Middle/High School District</b> <i>*The Union HS District will not hold a separate vote on the unification as all five member towns/districts are represented by each of the five towns/district votes.</i>	X	

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

<b>Dates, ADM, and Name</b>	
Date on which the proposal will be submitted to the voters of each district (16 V.S.A. § 706b(b)(11)): <u>Nov. 8, 2016</u>	
Date on which the new district, if approved, will begin operating (16 V.S.A. § 706b(b)(12)): _____ <u>July 1, 2018</u>	
Combined ADM of all “necessary” districts in the current fiscal year: _____ <u>1,583</u>	
Proposed name of new district: _____ <u>Addison Northeast Supervisory District (temporary)</u>	

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

<b>The Proposed School District is in the Best Interest of the State – as required by 16 V.S.A. § 706c</b>		
<p><u>Goal #1:</u> The proposed union school district will provide substantial equity in the quality and variety of educational opportunities.</p> <p><i>Act 46, Sec. 2(1)</i></p>	<p>The creation of one supervisory district will allow our region to be responsive to the goals of Act 46. We will be better able to prepare students at the elementary schools for success when they merge together at Mt. Abraham Middle/High School by allocating resources more effectively. This can be accomplished by eliminating inequities across the elementary schools and mobilizing personnel to schools in need as appropriate. One place where there are clear inequities is in our Expanded Learning Programs (after-school and summer).</p> <p>Specifically, unification will enhance equity and quality in the following ways:</p> <ul style="list-style-type: none"> <li>• Single mission, vision, and articulated continuous improvement plan across our elementary schools and middle/high school.</li> <li>• Flexible use of resources across schools will allow broader and more equitable educational opportunities.</li> <li>• Single school board will be tasked with ensuring all students receive similar preparation for Mt Abraham MS/HS.</li> <li>• Ability to deploy staff as needed to address changing enrollment or specific needs.</li> <li>• Greater equity in access to technology and pooled resources to support technology instruction.</li> </ul> <p>See Report pages 7-9 for more information.</p>	

<p><u>Goal #2:</u> The proposed union school district will lead students to achieve or exceed the State’s Education Quality Standards, adopted as rules by the State Board of Education at the direction of the General Assembly.</p> <p><i>Act 46, Sec. 2(2)</i></p>	<p>The above opportunities allow us to focus on the State’s Education Quality Standards. More efficient administration will free up more time to focus on educational outcomes.</p> <p>See Report pages 7-9 for more information.</p>	
<p><u>Goal #3:</u> The proposed union school district will maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with a goal of increasing the district-level ratio of students to full-time equivalent staff.</p> <p><i>Act 46, Sec. 2(3)</i></p>	<p>Operational efficiencies made possible by a consolidated Supervisory District Board can prevent duplication of duties in managerial and administrative staff. Increasing operational efficiencies will allow the new board and the administrative team to focus more exclusively on learning opportunities and outcomes. Consolidation of resources in Transportation, Special Education, Information Technology, and Food Service has already occurred, with some areas already yielding cost savings. The ability to flexibly assign staff where there is the greatest need has already proven effective in these areas.</p> <p>Student to teacher levels are already at ratios above the state average. Therefore, the study committee does not anticipate significant changes in staffing as a result of the merger.</p> <p>See Report pages 9-11 for more information.</p>	
<p><u>Goal #4:</u> The proposed union school district will promote transparency and accountability.</p>	<p>A single budget will provide taxpayers with a clearer picture of how money is being spent across the entire district instead of the school-by-school view possible today. One clear, articulated action plan for the district will allow for deeper analysis and measured progress towards</p>	



<p><i>Act 46, Sec. 2(4)</i></p>	<p>attaining goals.</p> <p>Specific ways unification will promote transparency and accountability are below:</p> <ul style="list-style-type: none"> <li>• Single budget including all district costs, voted directly by the electorate. This will eliminate the separate supervisory union budget that is not directly voted and is allocated to local districts by assessment.</li> <li>• Oversight by one board instead of seven increases: <ul style="list-style-type: none"> <li>○ Accountability for the superintendent: one board establishes priorities and monitors performance;</li> <li>○ Administrators’ ability to focus on schools and leadership;</li> <li>○ Transparency.</li> </ul> </li> <li>• The new Board will establish structures for local input and community engagement.</li> </ul> <p>See Report pages 11-12 for more information.</p>	
<p><u>Goal #5:</u> The proposed union school district will deliver education at a cost that parents, voters, and taxpayers value.</p> <p><i>Act 46, Sec. 2(5)</i></p>	<ul style="list-style-type: none"> <li>• Estimated savings of \$140,237 annually (see Report page 10 and Appendix E3) <ul style="list-style-type: none"> <li>○ Reduces the number of annual audits, and the associated costs, by maintaining one budget instead of seven;</li> <li>○ Streamlines accounting systems (e.g., one budget and no Supervisory Union assessments);</li> <li>○ Increases purchasing power.</li> </ul> </li> <li>• Four years of tax incentives for all homestead taxpayers in all five towns, beginning in the summer of 2018 (FY2019).</li> </ul>	

	<ul style="list-style-type: none"> <li>• Maintains Small School Support Grants as Merger Support Grants.</li> <li>• Maintains 3.5% hold harmless protection.</li> <li>• Eligibility for a \$150,000 grant to assist with transitional costs.</li> </ul> <p>See Report pages 6-9 for more information.</p>	
<p><u>Regional Effects:</u>          What would be the regional effects of the proposed union school district, including: would the proposed union school district leave one or more other districts geographically isolated?</p> <p><i>Act 46, Section 8(a)(2)</i></p>	<p>We do not anticipate any adverse regional effects of the proposed unification. All necessary school districts already operate as a supervisory union together.</p> <p>This new district does not isolate, geographically or otherwise, any district that would be either an obvious merging partner, or that has no other options. Other surrounding supervisory unions have already passed merger proposals, including Addison Central, Addison Northwest, Chittenden South, Chittenden East (MUUD), and Washington West.</p>	

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

<p>(3) The grades to be operated by the proposed union school district</p> <p>The grades, if any, for which the proposed union school district shall pay tuition</p>	<p>The new district will operate grades PreK-12 for all students.</p> <p>Tuition will only be paid for Pre-K students, pursuant to Act 166.</p> <p>See Article 3 Grades to Operate.</p>	
<p>(4) The cost and general location of any proposed new schools to be constructed</p> <p>The cost and general description of any proposed renovations</p>	<p>No new construction is proposed as part of this governance change.</p> <p>No immediate renovations are planned as part of this merger. The new SD board will plan for regular ongoing renovations as needed.</p> <p>See Article 4 Proposed New School Construction.</p>	
<p>(5) A plan for the first year of the proposed union school district's operation for:</p> <ul style="list-style-type: none"> <li>(A) the transportation of students</li> <li>(B) the assignment of staff</li> <li>(C) curriculum</li> </ul> <p>The plan must be consistent with existing contracts, collective bargaining agreements, and other provisions of law, including 16 V.S.A. chapter 53, subchapter 3 (transition of employees)</p>	<p>The New Supervisory District will provide for the transportation of students, assignment of staff, curricula, education programs, and student services that, to the extent practicable, are consistent with the policies and practices that were in existence during the year immediately preceding the first year of the SD's operation.</p> <p>The New SD Board of Directors will comply with 16 VSA Chapter 53, subchapter 3.</p> <p>See Article 5 Plan for First Year of Operations.</p>	
<p>(6) The indebtedness of the proposed merging districts that the proposed union school district shall assume.</p>	<p>The New SD will assume all capital debt, operating surpluses and deficits, reserve funds, and specific endowments and restricted accounts.</p> <p>See Article 6 Special Funds and Debt and Appendix C.</p>	

<p>(7) The specific pieces of real property owned by the proposed merging districts that the proposed union school district shall acquire, including:</p> <ul style="list-style-type: none"> <li>* their valuation</li> <li>* how the proposed union school district shall pay for them</li> </ul>	<p>The forming entities will convey to the New SD, for the sum of one dollar, and subject to all encumbrances of record, all of the real estate and personal property owned by them, including all land, buildings, and contents.</p> <table border="1" data-bbox="781 397 1669 779"> <thead> <tr> <th></th> <th>Total Insurable Value</th> <th>Estimated Debt 7/1/2017</th> </tr> </thead> <tbody> <tr> <td><b>Bristol</b></td> <td>\$9,074,854</td> <td>\$0</td> </tr> <tr> <td><b>Lincoln</b></td> <td>\$2,448,513</td> <td>\$1,353,363</td> </tr> <tr> <td><b>Monkton</b></td> <td>\$3,768,236</td> <td>\$172,443</td> </tr> <tr> <td><b>New Haven</b></td> <td>\$3,350,090</td> <td>\$0</td> </tr> <tr> <td><b>Starksboro</b></td> <td>\$4,020,333</td> <td>\$645,000</td> </tr> <tr> <td><b>Mt Abe MS/HS</b></td> <td>\$26,875,805</td> <td>\$0</td> </tr> <tr> <td><b>Total</b></td> <td><b>\$49,537,831</b></td> <td><b>\$2,170,806</b></td> </tr> </tbody> </table> <p>See Article 7 Real Estate and Property and Appendix C1 for more information.</p>		Total Insurable Value	Estimated Debt 7/1/2017	<b>Bristol</b>	\$9,074,854	\$0	<b>Lincoln</b>	\$2,448,513	\$1,353,363	<b>Monkton</b>	\$3,768,236	\$172,443	<b>New Haven</b>	\$3,350,090	\$0	<b>Starksboro</b>	\$4,020,333	\$645,000	<b>Mt Abe MS/HS</b>	\$26,875,805	\$0	<b>Total</b>	<b>\$49,537,831</b>	<b>\$2,170,806</b>	
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<p>(8) [repealed 2004 Acts and Resolves No. 130, Sec. 15]</p>																										
<p>(9) Consistent with the proportional representation requirements of the Equal Protection Clause, the method of apportioning the representation that each proposed member town shall have on the proposed union school board</p> <ul style="list-style-type: none"> <li>* no more than 18 members total</li> <li>* each member town is entitled to at least one representative</li> <li>* <i>see also</i> 16 V.S.A. § 706k(c): one or more at-large directors</li> <li>* <i>see also</i> 16 V.S.A. § 707(c):</li> </ul>	<p>The New Supervisory District Board of Directors shall be composed of thirteen (13) directors who are proportionally allocated based on population according to the most recent US decennial census. The initial allocation will be:</p> <p>Bristol (5), Lincoln (2), Monkton (2), New Haven (2), Starksboro (2)</p> <p>See Article 8 Board of Directors Composition.</p>																									

weighted voting																													
<p>(10) The term of office of directors initially elected, to be arranged so that one-third expire on the day of each annual meeting of the proposed union school district, beginning on the second annual meeting, or as near to that proportion as possible</p>	<p>School directors elected November 8, 2016 will serve for 1, 2, or 3 years, plus the additional months between the organizational meeting and the annual meeting. The following table summarizes the initial terms:</p> <table border="1" data-bbox="863 399 1604 756"> <thead> <tr> <th rowspan="2">Representative</th> <th colspan="3">Term expiring</th> </tr> <tr> <th>March 2018</th> <th>March 2019</th> <th>March 2020</th> </tr> </thead> <tbody> <tr> <td>Bristol</td> <td>1</td> <td>2</td> <td>2</td> </tr> <tr> <td>Lincoln</td> <td>1</td> <td></td> <td>1</td> </tr> <tr> <td>Monkton</td> <td></td> <td>1</td> <td>1</td> </tr> <tr> <td>New Haven</td> <td>1</td> <td>1</td> <td></td> </tr> <tr> <td>Starksboro</td> <td>1</td> <td></td> <td>1</td> </tr> </tbody> </table> <p>See Article 9 Board of Directors Terms and Elections.</p>	Representative	Term expiring			March 2018	March 2019	March 2020	Bristol	1	2	2	Lincoln	1		1	Monkton		1	1	New Haven	1	1		Starksboro	1		1	
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Starksboro	1		1																										
<p>Any other matters that the study committee considers pertinent, including whether votes on the union school district budget or public questions shall be by Australian ballot</p> <p><i>(please list each matter separately)</i></p>	<ul style="list-style-type: none"> <li>• Votes on the budget by Australian ballot, co-mingled</li> <li>• Votes on public questions by Australian ballot, co-mingled</li> <li>• Votes for School Board representatives, by Australian ballot, by town</li> </ul> <p>See Article 13 Australian Ballot Voting and Article 8 Board of Directors Composition.</p> <p>See also</p> <p>Article 10 Vote on Articles and New Board</p> <p>Article 11 Operating Date</p> <p>Article 12 Forming Entities Cease to Exist</p> <p>Article 14 Provision for Closure of a School</p> <p>Article 15 Community Engagement and Input</p> <p>Article 16 School Attendance</p>																												

**Addison Northeast Supervisory Union**  
**Act 46 Study Committee**  
**Final Report & Articles of Agreement**



**Addison Northeast Supervisory Union**

**Towns of Bristol, Lincoln, Monkton, New Haven, and Starksboro**

**September 1, 2016**

**(Subject to State Board of Education Approval)**

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**ANESU Act 46 Study Committee Members**

**Bristol**: Kate Heath, Elin Melchior, Allison Sturtevant (Vice-Chair), Michaela Wisell

**Lincoln**: Mike Fisher, Rebecca Otey

**Monkton**: Dawn Griswold, Steve Pilcher, Jennifer Stanley (Chair)

**New Haven**: Sarah LaPerle, Ed McGuire

**Starksboro**: Nancy Cornell, Caleb Elder, Herb Olson (Secretary)

**Advisory Participants**

Armando Vilaseca, ANESU Interim Superintendent (through 6/30/16)

Andrew Pond, Consultant (through 6/28/16)

Catrina DiNapoli, ANESU Assistant Superintendent

Howard Mansfield, ANESU CFO

Patrick Reen, ANESU Superintendent (effective 7/1/16)

Steve Stitzel, Legal Counsel



## **Executive Summary**

Following the passage of Act 46, the school boards of the Addison Northeast Supervisory Union (ANESU) formed a study committee with all of the ANESU member districts. The ANESU Act 46 Study Committee’s charge was to study the benefits and challenges with complying with Act 46. It is the recommendation of the ANESU Act 46 Study Committee to pursue merger incentives and protections as a RED pursuant to Act 153 (2010) and Act 46 and draft articles of agreement for a unified supervisory district to include all five towns. This unification has the goals of gaining voter approval of a new supervisory district on General Election Day 2016 (November 8, 2016) and of meeting the requirements for Act 46.

We believe that unifying into one supervisory district presents the best opportunity for all our students. A unified supervisory district will provide greater equity, quality, and diversity of educational programs. It will also open the door to financial savings made possible by streamlining governance, estimated to be approximately \$140,000 a year. Unification will also allow our communities to receive Act 46 financial and tax incentives. If we unify now, we can merge under the terms and conditions we desire, to chart a better course for our children.

## **ANESU Governance Study and Evolution**

### **Vision for a New District**

The Study Committee envisions a unified supervisory district that provides an excellent education to all students and assures equity, regardless of the town of residence. As articulated in our district-wide [ENDS Policy](#), we aspire to create a school system that will assure that the children of our five towns can “meet the challenges of lifelong learners and responsible citizens at a cost deemed acceptable by the community” (APPENDIX G – ANESU ENDS POLICY). We seek a supervisory district which unifies municipalities while respecting the history and culture of each community and school, and the value of schools to those communities.

Unification itself will not guarantee instant results. Rather, it will provide a structure designed to support clearly articulated goals and objectives all aimed at the same positive outcome. Unification will provide maximum financial benefits for our municipalities, and will also avoid the imposition of a state-developed plan, as required in Act 46, Sec. 10 (see [Act 46](#), pages 7 and 19 ). Unification will support efforts already under way to ensure that our learners are able to access the many educational opportunities at the middle/high school, where students from our five elementary schools already merge to create a school community of their own. As articulated in Mt. Abraham’s [5-Town Promise](#) and with the support of [ACT 77](#), which is about flexible pathways and proficiency-based learning, now is the right time to do more than just say

we are a 5-Town community, but to, in fact, operate as one (APPENDIX H – ANESU 5-TOWN PROMISE and APPENDIX I – VT ACT 77 – FLEXIBLE PATHWAYS INITIATIVE).

We believe that the creation of one unified supervisory district will allow our region to be responsive to the goals of Act 46 as follows:

- 1) Equity and Quality: We can better prepare students at the elementary schools for success when they merge together at Mt. Abraham Middle/High School by allocating resources more effectively. This can be accomplished by eliminating inequities across the elementary schools and mobilizing personnel to schools in need as appropriate. One place where there are clear inequities is in our Expanded Learning Programs (after-school and summer), which we believe to be important for children and families.
- 2) Efficiency and Sustainability: Operations efficiencies made possible by a unified supervisory district board can prevent duplication of duties in managerial and administrative staff. Increasing operational efficiencies will allow the new unified supervisory district board and administrative office to focus more exclusively on learning opportunities and outcomes. Consolidation of resources in transportation, special education, information technology, and food service has already occurred, and some areas have already yielded cost savings. The ability to flexibly assign staff where there is the greatest need has already proven effective in these areas.
- 3) Transparency and Accountability: A single budget will provide taxpayers with a clearer picture of how money is being spent across the entire district in a manner not currently possible. One clear, articulated action plan for the new unified supervisory district will allow for deeper analysis and measured progress towards attaining goals.

We recognize that there are some tradeoffs to unification, and that community members have real and serious concerns. Indeed, with any change, we give up ways that we do things today with the expectation that the new way will be better. The Committee's study of whether to unify has included discussion of many concerns about unification. We believe the expected benefits of unifying outweigh these concerns. Below are a few of the many concerns the committee has discussed.

- The budget will be presented as one budget for all schools, including the current supervisory union office, and voters will be able to vote on the full budget. This new budget will be large, as current education spending for the entire ANESU district is approximately \$24 million each year. However, all of the expenses will be presented in one budget, and voters can vote directly on this full budget. Preparing one budget also means there won't be assessments for centralized services, and the new unified supervisory district board will have more flexibility in balancing priorities.

- The new unified supervisory district electorate will vote on the single unified supervisory district budget by Australian ballot. Today, some of our communities vote on their individual school district budget by Australian ballot, while others vote on the floor of Town Meeting. The new unified supervisory district must choose one of these two methods. Many community members are saddened by the loss of floor voting and the dialog it allows for those who are present. The Study Committee recommends Australian ballot voting because we believe it allows more people to participate. In the future, the voting method could be changed by the voters of the new unified supervisory district.
- The new unified supervisory district will have more flexibility in assigning staff, meaning teachers and other staff could be shared between buildings, or assigned to a different building if needs change. As a result, there could be changes in staff from year to year. Just as we have seen with consolidation of special education, the administration works to keep staff in the same building. In the new model, if needs change and a specific teaching position is no longer needed in one school, then that teacher could have the option to take a position in a different building rather than lose their job.
- In the new unified supervisory district, one board will oversee and evaluate the superintendent. Some people worry that one board would have less power over the superintendent and administration compared to today's model. Today, our Supervisory Union has seven boards plus an executive committee who monitor and evaluate individual pieces of our supervisory union, providing many, splintered pieces of input. For example, today each of the six school district boards plus the ANESU Executive Committee review the same monitoring reports that show progress towards meeting our stated goals. It is common for these boards to provide different and even conflicting feedback on these reports. We believe one board will be able to speak with a clear voice in defining goals and providing feedback. Additionally, one board will give community members with concerns one place to bring those concerns. The proposed governance model features strong principals who are leaders of their schools who may work together with local, school-based advisory councils. These voices will help ensure that the new unified supervisory district board continues to value each school's uniqueness within the larger unified supervisory district.

Please read on to see more detail about how we believe that a unified supervisory district will provide important benefits to our students and communities.

**Equity and Quality**

Act 46 - “The legislation is designed to encourage and support local decisions and actions that:

- Provide substantial equity in the quality and variety of educational opportunities;
- Lead students to achieve or exceed the State’s Education Quality Standards.”

According to the projections from the Addison County Planning Commission, ANESU is likely to continue to see an overall decline in enrollment commensurate with state trends. Act 46 itself notes a decline in statewide K-12 populations from 103,000 to 78,300 from fiscal year 1997 to 2015 (Act 46, page 1). The loss in pupils has had a negative effect on individual school budgets due to a decrease in several revenue sources, including Medicaid reimbursements and grant funding. Now, more than ever, we need the opportunity to be flexible in the use of our resources and to realize larger-scale efficiencies in our business operations. With one mission, vision, and articulated continuous improvement plan, we will be better equipped to support the needs of all of our schools in a more coordinated manner. A unified supervisory district provides much greater flexibility to find creative ways to meet the needs of our students and continue to provide a top quality education.

Having a larger district will help support a number of educational objectives. For example, we may identify the need for more fine arts programming in our elementary schools or to balance our program offerings (see Appendix B3 – ANESU Elementary School Programs Comparison (FY16)). Or, as a district, we may identify a need for materials and training in vocabulary instruction and pool our resources appropriately. Larger scale coordination provides opportunities not otherwise accessible to some of our students. For example, at the ANESU May 2016 All Boards Meeting, our district-wide math curriculum coordinator shared the many benefits we are seeing from moving toward a single math curriculum in all our elementary schools. With a standard curriculum, we can do professional development for a larger pool of teachers, such as all first and second grade teachers together. We can work together to provide resources for working with not only students who need extra supports, but also with those who need more challenging activities. Since students are learning the same curriculum, we can measure progress the same way from school to school, and can identify where extra help is needed. We can also expect students to arrive at Mt. Abraham Middle/High School with similar math knowledge. While this example shows that we are capable of implementing a standard curriculum today, the process is slow. In a unified supervisory district, recommendations would be made by one group responsible for and representing all schools, allowing budgeting for those recommendations to be done by one board in a deliberate way.

Included in the goal to provide an equitable and high quality education across all of our schools, is a deep value for the unique character of each of our schools. We believe these unique cultures and values can and will be maintained in a unified supervisory district. The Study Committee has firmly stated this desire by adding a special article, Article 15, which begins by

affirming “Community connections to local schools are celebrated and cherished. Each community feels that schools are the heart of the community and values and supports equitable and quality public education for their children.”

Creating a single school district could also help address inequalities in class size and staffing. With declining enrollment comes the need for a reduction in force (staff reduction). Today we lose incredibly talented educators to other districts in the state because we do not have the ability to retain them at one of our other schools. When we have talented staff in whom we have invested time and professional development, we need the flexibility to keep these educators within one of our schools. Benefits can be found in coordinating other staff as well. For example, we could bring our custodial staff together to tackle a particular short-term project in a building versus hiring outside vendors or additional staff, which in turn can save money.

In a unified supervisory district, we hope to pursue grant opportunities and receive reimbursements that will support programming for all students across all schools. For example, only two of our six schools were eligible for a 21st Century learning grant. This grant totaled close to \$1,000,000 over five years. We want quality after-school and summer learning programs available to all of our students, so we are currently managing seven different funding sources to provide programs to all of our elementary schools, with some variation in scope. We have not been able to stretch to the middle/high school level, but have many innovative ideas we would love to be able to put into place. Operating one unified supervisory district could, over time, reduce or eliminate the inequities that exist across our elementary schools (Appendix B3 – ANESU Elementary School Programs Comparison (FY16)). It is important that we both protect and build upon the best practices already happening in our schools, and to work on making them more accessible to all of our learners in all of our schools.

The use of technological tools continues to play a significant and ever-evolving role in education today. Employers, higher education, and career technical education centers are expecting us to be graduating students skilled in the use of technology for a variety of purposes. Since consolidating our Information Technology Departments five years ago, we are beginning to see the benefits of that decision in terms of accessibility to devices, reliability of internet services, and cost savings. For example, effective July 1st, 2016, ANESU is able to provide 1 GB of bandwidth to every user at every school, improving accessibility to all of our learners using Cloud technology. This is a significant improvement from a few years ago, when users in some of our buildings were often unable to access the internet at all. Unification will allow us to not only coordinate technology support personnel to fix issues, maintain equipment, and save money through bulk purchasing, but we can also assemble a team of skilled practitioners currently spread out across different buildings. Pooling these experts together can help to coordinate and support the integration of technology. It will also influence the important

decisions related to best educational practices and provide training needed to be successful and current in this digital age.

**Efficiency and Sustainability**

Act 46 - “The legislation is designed to encourage and support local decisions and actions that:

- 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;
- Deliver the highest quality education at a cost that parents, voters and taxpayers value.”

The cost of education on a per-pupil basis has been on the rise in Vermont for over 15 years, and our state is one of the top three highest spenders according to the US Department of Education. This has been driven primarily by declining enrollment and the challenge of reducing staffing levels to correspond with this decline. Many other factors have also contributed to the continued rising costs, including new state initiatives and mandates, increased need for academic, social, and emotional supports, inflation, and the rising cost of personnel benefits. Although there is some variation elementary school by elementary school, Mt. Abraham Middle/High School and ANESU as a whole have been on a steady enrollment decline for years (APPENDIX B – STUDENT ENROLLMENT AND SCHOOL PROGRAMS INFORMATION). The recent expansion of PreK programs has given our enrollment numbers a boost in recent years, but the overall number of students in each grade has been falling. To manage costs in this reality, the administration and boards need to manage available resources across a larger organization.

ANESU has already consolidated many services to students including transportation, special education, information technology, universal pre-kindergarten, food service, service contracts, and bulk purchasing. Like any change, consolidation requires a transition period, and can be a little bumpy until we are comfortable in our new ways of working. From our past service consolidations, we have learned much about merging services, and we are starting to see some cost savings. We are also continuing to learn about how to best manage these merged services, and to benefit from their opportunities.

Our financial operations are supported by one accounting system, but within that system, we have seven different district entities, regularly duplicating one similar task seven different times. Similarly, building and managing seven different budgets has a significant impact on the business office for the majority of the school year, causing personnel to be less responsive to daily needs at the school level. With seven different districts, providing up-to-date financial information to school boards and preparing monthly and quarterly state reports is time consuming and inefficient.

In a unified supervisory district:

- The accounting system would be streamlined;
- We would bring the voters one preK-12 budget for one vote;
- Only one audit would be needed;
- We would budget for 13 board member stipends versus the current 34;
- The need for financial assessments and transfers between the SU and districts would be eliminated;
- The number of financial reports would be reduced significantly.

We estimate a potential cost savings related to these specific areas of Board, Legal, and Audit services of approximately \$140,000 (Appendix E3 – ANESD Estimated Board, Legal, and Audit Services cost savings based on actual FY16 expenditures). These cost savings do not include any anticipated reductions in teaching, support, or administrative staffing levels, or educational programming.

Simplifying school budgeting frees up time for school leaders to work together to share ideas and focus on effective programming. A unified supervisory district could result in a more acceptable budget for all districts. Unification would also allow enrollment changes to be absorbed more easily due to scale, helping to stabilize education spending per equalized pupil. Currently, each school's budget is divided by the number of students in the individual school to determine the cost per pupil. A drop in a few students in a solitary school district can affect the cost per pupil drastically. If we become a unified supervisory district, the number of students is much greater. Therefore, the impact of that particular school's drop in enrollment does not affect the now district-wide cost per pupil as significantly. In the new unified supervisory district, the cost per pupil would be the same for each school, as well as more stable from year to year.

Approximately 85% of the superintendent's time is spent preparing for, attending, and debriefing board meetings, or on board committee work. In a unified supervisory district, we would seek to reduce that effort to less than 50%, with the ultimate goal of doing work that serves the unified supervisory district board and is central to the overall efforts of educating all learners within the 5-towns of ANESU. Approximately 60% - 70% of the executive assistant to the superintendent's time is spent on monthly board functions, such as creating and warning agendas, dealing with boards' inquiries, managing minutes, and more.

Reducing superintendent and staff time focused on board work frees up time for educational leadership functions. The superintendent needs to be able to support building-level administrators, be a presence in schools, and be a face of the organization to the community as a whole. In our current model, with as many as twenty-four night meetings a month and related

preparation and follow up, the superintendent cannot be a hands-on educational leader. In a unified supervisory district, the superintendent can interact with more stakeholders, in addition to board members, in a variety of settings, thereby building relationships and communicating in a more transparent and accountable system.

In addition to efficiencies related to administrative tasks, efficiencies related to professional development priorities and opportunities will increase expertise and internal capacity in our new unified supervisory district. For example, a teacher fluent in the use of a particular teaching strategy in one school can be a resource to a teacher in another school. Additionally, one unified supervisory district board will provide greater clarity related to expected outcome measures, metrics related to our district-wide ENDS Policy, and an accountability system that is consistent for all learners. This will result in ANESU faculty and staff feeling better supported.

The Study Committee anticipates that a unified supervisory district governance structure will enable central office and building leadership to improve operations in many ways. By reducing inefficient and duplicated processes required today, the new unified supervisory district will be able to:

- Increase focus on instructional leadership;
- Devote time to greater coordination of curriculum, instruction and assessment;
- Provide firsthand feedback, support and appreciation to faculty, staff and students;
- Design a more effective supervision/evaluation or professional growth system aligned to district goals and resources;
- Continue to make thoughtful decisions based on research and evidence-based practices in education;
- Improve communication practices and systems within the district and related public relations.

### **Transparency and Accountability**

Act 46 - “The legislation is designed to encourage and support local decisions and actions that:

- Promote transparency and accountability;
- Delivered at a cost that parents, voters, and taxpayers value.”

Act 46 identifies transparency and accountability as one of the primary goals in the legislation. While the Act is not explicit in what these terms mean, it does connect this with voters being able to vote directly on the current supervisory union budget (see Act 46, page 17). We understand this goal to mean that the new unified supervisory district board will prepare and present one complete budget to voters. This budget would include all costs for all operations in our six school districts and current supervisory union, including central office expenses and



consolidated functions and services. Voters would be able to vote directly on all of these expenses at one time.

Today, as required by law, our supervisory union budget is prepared and adopted by the supervisory union board, and voters cannot directly vote on it. This supervisory union budget is then assessed to each school in the supervisory union, based on student population. As the state has required more and more functions to be consolidated at the supervisory union level, this non-voter approved budget has continued to grow larger, making these assessments an increasingly significant portion of each individual school's budget.

In the proposed unified supervisory district, one board and one budget allow for more transparency and accountability than are possible today. One board is responsible for assuring an excellent education for every student. One board is held accountable to a reasonable budget based in sound decision-making and community input. While the new unified supervisory district budget would be larger than any budget presented today, it would also be more transparent because all operational costs are included in one single budget that is directly voted by the entire new unified supervisory district electorate. One board is responsible for establishing clear expectations for the superintendent, who is no longer beholden to the will of seven different boards who may give potentially conflicting direction. Communication will be better streamlined in a unified supervisory district, allowing leadership to carry out expectations in a timely manner and provide monitoring reports on schedule. One board is also responsible for addressing community concerns, making it easier for community members and parents to know which group to work with. (See Appendix E1 – ANESU Current Governance Structure (~34 School Directors) and Appendix E2 – ANESD Possible Unified Supervisory District Structure).

## **Conclusion**

Act 46 encourages school districts to realign governance structures across a larger unified district. In ANESU, this governance change will open the door for other improvements for our learners. There will still be challenges as we continue to push ourselves to educate all our children so that they can meet the challenges of lifelong learners and responsible citizens at a cost deemed acceptable by the community. ANESU prides itself in putting students first, using innovative and engaging practices, and using resources wisely. We believe that by truly operating as a 5-Town Supervisory District, we will further support the great work already happening in our schools. We will provide even more opportunities for all of our learners and continue our work to fulfill our goal to provide our learners the highest quality education possible.

## **Articles of Agreement**

The Addison Northeast Supervisory Union Act 46 Study Committee recommends that the following Articles of Agreement be presented to and adopted by the electorate of each necessary school district for the creation of a pre-Kindergarten through Grade 12 Supervisory District to be named Addison Northeast Supervisory District, hereafter referred to as the “New Supervisory District” or “New SD”.

### **Article One: Necessary Forming School Districts**

The school districts of Bristol Elementary School District, Lincoln Community School District, Monkton Central School District, Beeman Elementary School District (New Haven), Robinson Elementary School District (Starksboro), (collectively the Elementary Forming Districts) and Mt. Abraham Union Middle and High School District (High School Forming District) are necessary for the establishment of the New Supervisory District. The Elementary Forming Districts and High School Forming District are referred to collectively herein as the Forming Districts.

The Forming Districts are all members of the Addison Northeast Supervisory Union.

The Forming Districts and the Addison Northeast Supervisory Union are referred to herein as Forming Entities.

If the voters of all the Elementary Forming Districts vote to approve the merger, and the Vermont State Board of Education designates the merged entities as a supervisory district pursuant to 16 V.S.A. Section 261(c), then the New Supervisory District will commence full educational operations and services on July 1, 2018, under the provisions of applicable Vermont law.

### **Article Two: Additional Districts**

There are no additional school districts being recommended at this time.

### **Article Three: Grades to Operate**

The New SD will operate grades pre-kindergarten through twelfth (PK-12) to provide public education to all of the students in the New Supervisory District.

### **Article Four: Proposed New School Construction**

No new school construction is necessary to, or proposed for, the formation of the New SD.

### **Article Five: Plan for First Year of Operations**

The New SD will provide for the transportation of students, assignment of staff, curricula, education programs, and student services that, to the extent practicable, are consistent with the contracts, policies and practices that were in existence during the year immediately preceding the first year of the New Supervisory District’s operation.

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

The Board of School Directors of the New SD shall make all subsequent decisions relative to the operation of the new district consistent with state and federal laws and these Articles of Agreement.

### **Article Six: Special Funds and Debt**

#### Capital Debt

The New SD shall assume all capital debt of the Forming Entities, including both principal and interest, as may exist at the close of business on June 30, 2018, with the exception that any debt incurred by a Forming Elementary District for a non-essential repair of such Forming Elementary District's school building after November 8, 2016, that will not be repaid in full on or before June 30, 2018, shall not be assumed by the new SD unless the voters of the New SD vote to assume such debt as a debt of the New SD. The governing board of the New SD shall determine what constitutes an essential repair of a school building.

#### Operating Fund Surpluses and Deficits

The New SD shall assume any and all general operating surpluses and deficits of the Forming Entities that may exist at the close of business on June 30, 2018. In addition, reserve funds identified for specific purposes will be transferred to the New SD and will be applied for said purpose unless otherwise determined through appropriate legal procedures.

#### Specified Funds

The Forming Entities will transfer to the New SD any pre-existing school district specific endowments or other restricted accounts that may exist on June 30, 2018. Scholarship funds or like accounts held by school districts prior to June 30, 2018, that have specified conditions of use will be used in accordance with said provisions.

#### Transfer of Debt and Funds:

The debt and funds specified above shall be transferred to the New SD in accordance with procedures and timelines established by the New SD Board following its organizational meeting, as further discussed in Article 11.

### **Article Seven: Real Estate and Property**

#### (a) Real Estate and Personal Property

No later than June 30, 2018, the Forming Entities will convey to the New SD, for the sum of one dollar, and subject to all encumbrances of record, all of the real estate and personal property owned by them, including all land, buildings and contents.

- (b) Disposal of Real Estate. In the event that, and at such subsequent time as, the New SD Board determines that any of the real property, including buildings and land, conveyed to it by the Elementary Forming Districts is or are unnecessary to the continued operation of the New SD and its educational programs, the New SD shall convey such real property, subject to any restrictions in the deed and all encumbrances of record, for the sum of one dollar, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants as required by Vermont law, to the municipality in which it is located. The process for determining the closure of a school is outlined in Article Fourteen below.

The conveyance of any real property to the town in which it is located shall be conditioned upon the town owning and using the real property for community and public purposes for a minimum of five years. In the event a town elects to sell the real property prior to five years of ownership, then the town shall compensate the New SD for all capital improvements and renovations completed after the formation of the New SD and before sale to the town. In the event a town elects not to acquire ownership of such real property, then the New SD shall sell the property upon such terms and conditions as established by the New SD Board of Directors. Any sale of school property shall be in a manner that is consistent with applicable provisions of state law.

- (c) In the event that, and at such subsequent time as, the New SD Board determines that any real property, including land and buildings, conveyed to it by the High School Forming District is or are unnecessary to the continued operation of the New SD and its educational programs, the New SD Board shall, pursuant to Vermont statutes, sell the property upon such terms and conditions as established by the New SD Board.
- (d) The New Supervisory District recognizes the long term financial investments and community relationships that each town has with its elementary school building. The New SD Board will encourage and continue use of each building by the students and community in accordance with 16 V.S.A. Section 563(3), taking into consideration the policies, practices, and procedures followed prior to formation of the New SD. Additionally, the existing elementary schools and high school have been supported by their respective communities by non-property tax fund raising activities. The New SD Board will develop policies that will allow the continuation of school-based fund raising activities.

#### **Article Eight: Board of Directors Composition**

The New Supervisory District Board of Directors shall be composed of thirteen (13) directors who shall have equal votes and are proportionally allocated based on population as follows:

- (a) The combined population of all Forming Elementary Districts (and after formation of the New SD, the town of each Forming Elementary District, referred to as “Member Town”) determined by the most recent U.S. census will be divided by thirteen (13) to establish an “Initial Population Minimum.” Each Forming Elementary District/Member Town shall be allocated one director for each Initial Population Minimum. (Example based on 2010 census:  $10,649$  (total population of Forming Elementary Districts/Member Towns) /  $13 =$

819; Bristol elects four (4) directors; Monkton, New Haven and Starksboro elect two (2) each, and Lincoln elects one (1)). (Allocation of only eleven (11) seats).

- (b) If, allocation in accordance with sub-paragraph (a) above does not allocate thirteen (13) seats, there shall be an additional allocation of one (1) director to Forming Elementary Districts/Member Towns whose populations, after subtracting one or more Initial Population Minimums have a greater remaining population than any other town until all thirteen (13) seats are allocated. (Example: Bristol and Lincoln have the largest remaining populations of 739 and 636 respectively. This allocates the two (2) remaining seats).
- (c) Directors shall be nominated from the legal voters of each Forming Elementary District/Member Town and shall be elected by Australian Ballot vote by the respective voters of each Forming Elementary District/Member Town.
- (d) The initial Board of Directors shall have the following allocation:

**Number of School Board Members by Town**

<b>Town</b>	<b>Board Member(s)</b>	<b>Town Population</b>
Bristol	5	3,894
Lincoln	2	1,271
Monkton	2	1,980
New Haven	2	1,727
Starksboro	2	1,777
<b>Total</b>	<b>13</b>	<b>10,649</b>

- (e) The initial Board of Directors shall be elected at the General Election on November 8, 2016 and shall assume office at the time of the organizational meeting of the New SD held in accordance with 16 V.S.A Sections 706i and 706j.

**Article Nine: Board of Directors Terms and Elections**

Pursuant to the provisions of 16 VSA §706j(b), elected school directors shall be sworn in and assume the duties of their office. The term of office for School Directors elected at the November 8, 2016, election shall be one, two, or three years respectively, plus the additional months between the date of the Organizational Meeting of the New SD (16 VSA §706j), when the initial school directors will begin their term of office, and the date of the New SD’s annual meeting in the spring of 2017, as established under 16 VSA §706j. Thereafter, terms of office shall be three (3) years and shall begin and expire on the date of the New SD’s Annual Meeting. The following table establishes the expiration dates of the initial terms:

Representative	Term expiring		
	March 2018	March 2019	March 2020
Bristol	1	2	2
Lincoln	1		1
Monkton		1	1
New Haven	1	1	
Starksboro	1		1

**Article Ten: Vote on Articles and New Board**

The articles to create the New Supervisory District will be submitted to the voters of each Elementary Forming District identified in Article One on General Election day, November 8, 2016. The vote will be by Australian ballot and ballots will not be commingled. The form of the article to be submitted to the voters shall be substantially as follows:

Shall the voters of the \_\_\_\_\_ Town School District vote to form the Addison Northeast Supervisory District (“New Supervisory District” or “New SD”) on the following terms:

- 1 The districts listed below (referred to herein as “Member Districts”) shall all be identified as “necessary” for the formation of the New SD:

Bristol Elementary School District  
 Lincoln Community School District  
 Monkton Central School District  
 Beeman Elementary School District (New Haven)  
 Robinson Elementary School District (Starksboro)

The Mt. Abraham Union Middle and High School District shall also be considered necessary for the formation of the New SD but it shall not be referred to as a Member District and its interests are represented by the voters of each of the Town School Districts.

2. The New SD will operate grades pre-kindergarten through twelfth (PK-12) to provide public education to all of the students in the New Supervisory District.
3. The New Supervisory District Board of Directors shall be composed of thirteen (13) directors who shall have equal votes and are proportionally allocated based on population as follows:

(a) The combined population of all Forming Elementary Districts (and after formation of the New SD, the town of each Forming Elementary District, referred to as “Member Town”) determined by the most recent U.S. census will be divided by thirteen (13) to establish an “Initial Population Minimum.” Each Forming Elementary District/Member Town shall be allocated one director for each Initial Population

Minimum. (Example based on 2010 census: 10,649 (total population of Forming Elementary Districts/Member Towns) / 13 = 819; Bristol elects four (4) directors; Monkton, New Haven and Starksboro elect two (2) each, and Lincoln elects one (1)). (Allocation of only eleven (11) seats).

(b) If, allocation in accordance with sub-paragraph (a) above does not allocate thirteen (13) seats, there shall be an additional allocation of one (1) director to Forming Elementary Districts/Member Towns whose populations, after subtracting one or more Initial Population Minimums have a greater remaining population than any other town until all thirteen (13) seats are allocated. (Example: Bristol and Lincoln have the largest remaining populations of 739 and 636 respectively. This allocates the two (2) remaining seats).

(c) Directors shall be nominated from the legal voters of each Forming Elementary District/Member Town and shall be elected by Australian Ballot vote by the respective voters of each Forming Elementary District/Member Town.

(d) The initial Board of Directors shall have the following allocation:

**Number of School Board Members by Town**

<b>Town</b>	<b>Board Member(s)</b>	<b>Town Population</b>
Bristol	5	3,894
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Monkton	2	1,980
New Haven	2	1,727
Starksboro	2	1,777
<b>Total</b>	<b>13</b>	<b>10,649</b>

4. (a) Real Estate and Personal Property

No later than June 30, 2018, the Forming Entities will convey to the New SD, for the sum of one dollar, and subject to all encumbrances of record, all of the real estate and personal property owned by them, including all land, buildings and contents.

(b) Disposal of Real Estate. In the event that, and at such subsequent time as, the New SD Board determines that any of the real property, including buildings and land, conveyed to it by the Elementary Forming Districts is or are unnecessary to the continued operation of the New SD and its educational programs, the New SD shall convey such real property, subject to any restrictions in the deed and all encumbrances of record, for the sum of one dollar, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants as required by Vermont law, to the municipality in which it is located.

The conveyance of any real property to the town in which it is located shall be conditioned upon the town owning and using the real property for community and public purposes for a minimum of five years. In the event a town elects to sell the real property prior to five years of ownership, then the town shall compensate the New SD for all capital improvements and renovations completed after the formation of the New SD and before sale to the town. In the event a town elects not to acquire ownership of such real property, then the New SD shall sell the property upon such terms and conditions as established by the New SD Board of Directors. Any sale of school property shall be in a manner that is consistent with applicable provisions of state law.

(c) School Closure. The New SD Board shall not close any school conveyed to the New SD by a Forming Elementary District within the first four (4) years of operation of the New SD. After four (4) years of operation, the New SD may close a school conveyed to the New SD by a Forming Elementary District upon affirmative votes of the New SD Board of Directors and the voters, voting by Australian ballot, of the Member Town in which the school is located.

## 5. Transfer of Funds

### Capital Debt

The New SD shall assume all capital debt of the Forming Entities, including both principal and interest, as may exist at the close of business on June 30, 2018, with the exception that any debt incurred by a Forming Elementary District for a non-essential repair of such Forming Elementary District's school building after November 8, 2016, that will not be repaid in full on or before June 30, 2018, shall not be assumed by the new SD unless the voters of the New SD vote to assume such debt as a debt of the New SD. The governing board of the New SD shall determine what constitutes an essential repair of a school building.

### Operating Fund Surpluses and Deficits

The New SD shall assume any and all general operating surpluses and deficits of the Forming Entities that may exist at the close of business on June 30, 2018. In addition, reserve funds identified for specific purposes will be transferred to the New SD and will be applied for said purpose unless otherwise determined through appropriate legal procedures.

### Specified Funds

The Forming Districts will transfer to the New SD any pre-existing school district specific endowments or other restricted accounts that may exist on June 30, 2018. Scholarship funds or like accounts held by school districts prior to June 30, 2018, that have specified conditions of use will be used in accordance with said provisions.

6. The provisions of the Report and Formation Plan approved by the State Board of Education on \_\_\_\_\_, 2016, which is on file at the offices of the Addison Northeast Supervisory Union shall govern the New Supervisory District.



**Article Eleven: Operating Date**

Upon an affirmative vote of the electorates of each Elementary Forming District and upon compliance with 16 VSA §706g, the New SD Board shall have and exercise all of the authority which is necessary in order for it to prepare for full educational operations beginning on July 1, 2018. The New SD Board shall, between the date of its organizational meeting under 16 VSA §706j and June 30, 2018, undertake planning and related duties necessary to begin operation of the Supervisory District on July 1, 2018, including preparing for and negotiating contractual agreements, preparing and presenting the budget for fiscal year 2019, preparing for the first New SD Annual Meeting, and transacting any other lawful business that comes before the Board, provided, however, that the exercise of such authority by the New SD shall not be construed to limit or alter the authority and/or responsibilities of the Forming Entities that will remain in existence during the transition period for the purpose of completing any business not given to the New SD.

**Article Twelve: Forming Entities Cease to Exist**

On July 1, 2018, when the New SD becomes fully operational and begins to provide educational services to students, the Forming Districts shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the New SD under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2018 when the Forming Districts shall cease to exist. The Addison Northeast Supervisory Union shall cease to exist on January 31, 2019.

**Article Thirteen: Australian Ballot Voting**

The New SD voters shall vote on the annual school district budget and public questions by Australian ballot with polling places provided in each Forming Elementary District/Member Town. Ballots will be delivered to the New SD clerk and commingled for counting.

**Article Fourteen: Provision for Closure of a School**

The New SD Board shall not close any school conveyed to the New SD by a Forming Elementary District within the first four (4) years of operation of the New SD.

After four (4) years of operation, the New SD may close a school conveyed to the New SD by a Forming Elementary District upon affirmative votes of the New SD Board of Directors and the voters, voting by Australian ballot, of the Member Town in which the school is located.

**Article Fifteen: Community Engagement and Input**

Community connections to local schools are celebrated and cherished. Each community feels that schools are the heart of the community and values and supports equitable and quality public education for their children.

The New SD Board shall provide timely and sufficient opportunity for local input on policy and budget development. Structures to support and encourage public participation within the New SD will be established by the New SD Board of School Directors on or before June 30, 2018.

These structures may include but not be limited to local school councils that have an advisory responsibility in key areas, including but not limited to New SD budget development and hiring of principals.

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

**Article Sixteen: School Attendance**

The New SD Board shall support and continue the elementary education of students at the school located in the town where they reside, unless such school is closed as provided above. The Board may adopt policies to allow attendance of elementary school students at elementary schools within the New SD other than the school in the town where the student resides when such is appropriate to address unique needs of particular students.

Public high school choice under 16 VSA § 822a is available to students eligible for enrollment in the high school operated by the New SD.

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## **APPENDIX A – ANESU ACT 46 STUDY COMMITTEE INFORMATION**

### **A1 – ANESU Act 46 Study Committee Charge**

9/15/15 ANESU Boards:

*Move to form a study committee with the member districts of the Addison Northeast Supervisory Union which choose to participate. Committee membership shall be in compliance with Title 16 §706.*

ANESU Act 46 Study Committee Charge:

- I. In accordance with Title 16 §706b, Act 46, and Acts 153/156, study the benefits and challenges with complying with Act 46.
- II. Contract with outside person(s) to support the work of the committee within the established budget. This may include but is not limited to: process facilitation, data analysis, facilitation of committee discussions, legal counsel and community forum support.
- III. Consider if there is a benefit to our communities to invite other districts as advisable members of the committee. As outlined in Title 16 §706b(2) the committee has the final determination of what districts, if any, are deemed advisable.
- IV. Engage the communities with at least one public forum held in each of the participating necessary towns to hear community hopes and concerns prior to the committee making a recommendation.
- V. Make a determination as to whether the formation of a union district or other alternate structure is advisable and should be taken to the voters.
- VI. Prepare a report for the State Board of Education, including all elements required by Title 16, section 706b and Act 46 in the formation of a Union District or an Alternative Governance Structure. The report should be submitted in a timely fashion to allow for a community vote, if held, to occur on or before June 30, 2017.
- VII. Keep the SU Board and Communities regularly apprised of the committee's progress.

## **A2 – ANESU Act 46 Study Committee Meetings and Activities**

At the September 15, 2015, ANESU Board Executive Committee meeting, it was decided to create an ANESU Act 46 Study Committee and each local board was charged to appoint members to the ANESU Act 46 Study Committee. At the ANESU October 12, 2015, regular board meetings, each board appointed members to the ANESU Act 46 Study Committee. Meetings of the ANESU Act 46 Study Committee commenced October 26, 2015.

All ANESU Act 46 Study Committee meetings have been held in compliance with VT open meeting laws. Full study committee meetings were video-taped by NEAT TV-Bristol and are available at <http://www.neatbristol.com/>. Meeting agendas, minutes, and supporting materials are available at <http://www.anesu.org/school-boards/act-46-study-committee>.

### **Regular Committee Meetings**

October 26, 2015 – Mt. Abe Small Cafeteria – overview, organization  
November 11, 2015 – Mt. Abe Small Cafeteria  
November 30, 2015 – Mt. Abe Small Cafeteria  
December 9, 2015 – Mt. Abe Small Cafeteria  
January 6, 2016 – Mt. Abe Small Cafeteria  
January 27, 2016 – Mt. Abe Small Cafeteria  
February 3, 2016 – Mt. Abe Small Cafeteria  
February 17, 2016 – Mt. Abe Small Cafeteria  
March 2, 2016 – Mt. Abe Small Cafeteria  
March 16, 2016 – Beeman Elementary School  
March 30, 2016 – Lincoln Community School  
April 12, 2016 – Bristol Elementary School  
May 4, 2016 – Monkton Central School  
May 19, 2016 – Robinson Elementary School  
May 24, 2016 – Beeman Elementary School  
June 1, 2016 – Bristol Elementary School  
June 7, 2016 – Lincoln Community School  
June 14, 2016 – Beeman Elementary School  
June 22, 2016 – ANESU Central Office Conference Room  
June 29, 2016 – ANESU Central Office Conference Room  
July 7, 2016 – ANESU Central Office Conference Room  
July 13, 2016 – ANESU Central Office Conference Room  
July 20, 2016 – ANESU Central Office Conference Room  
July 27, 2016 – ANESU Central Office Conference Room  
August 29, 2016 – ANESU Central Office Conference Room

**ANESU Act 46 Community Activities**

August 31, 2015 – Lincoln Community School, Act 46 Public Forum, Special Guest:  
Representative David Sharpe

September 10, 2015 – Monkton Central School, Act 46 Discussion, Special Guest:  
Representative David Sharpe

November 9, 2015 – Robinson Central School, Community Engagement, Special Guest:  
Nicole Mace, Executive Director, VSBA

March 21, 2016 – June 3, 2016 – ANESU Act 46 Community Survey, paper and on-line

April 18, 2016 – June 3, 2016 – ANESU Act 46 Staff Survey, paper and on-line

May 9, 2016 – Mt. Abraham Union Middle/High School, Community Engagement

July 18, 2016 – Lincoln Community School, “ANESU Act 46 Night” – Public forum/ all  
communities

Additional public forums are planned, and, per Act 46, there will be one public forum in  
each town prior to the vote.

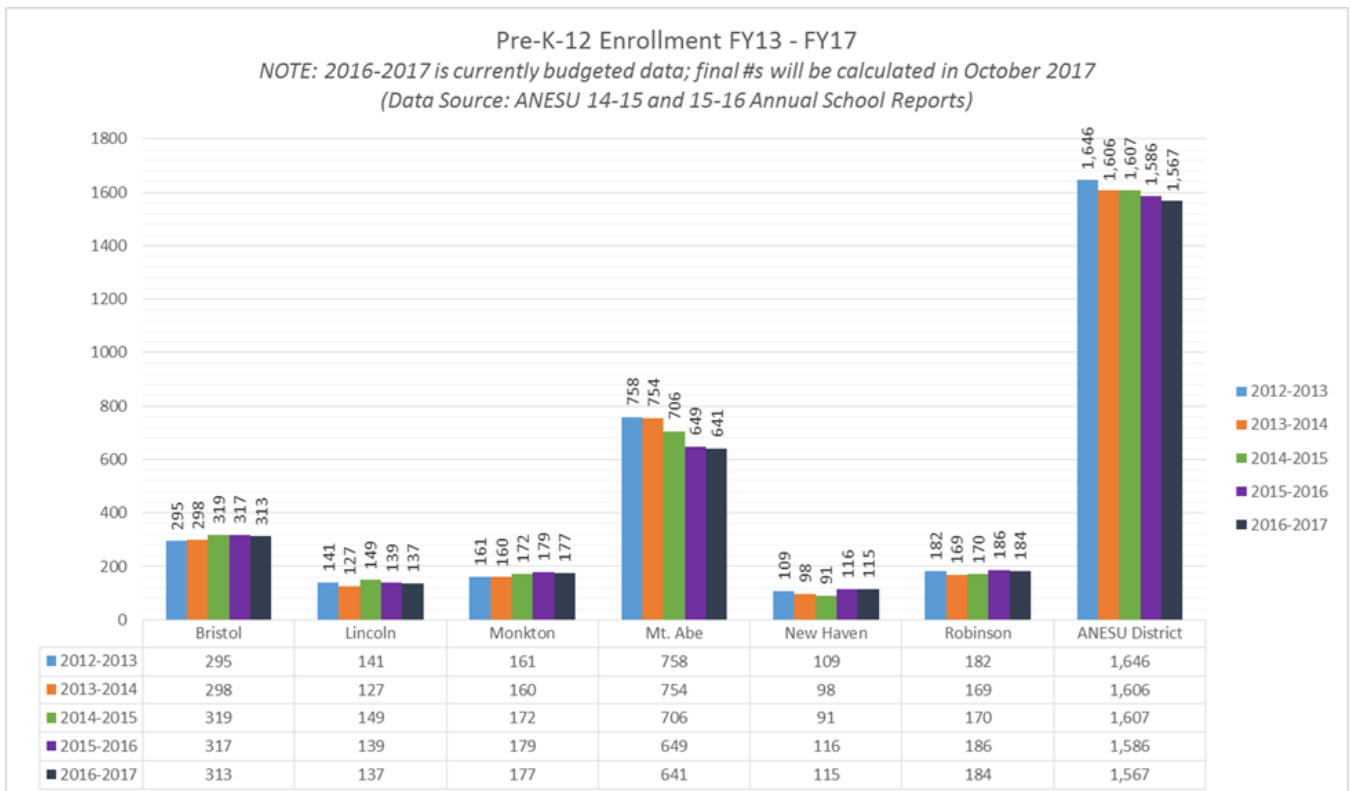
## **APPENDIX B – STUDENT ENROLLMENT AND SCHOOL PROGRAMS INFORMATION**

### **B1 – ANESU Pre-K-12 Enrollment Trends (FY03 – FY16)**

Student Enrollment numbers include Pre-K students in each elementary school. Due to changes in state law over time, countable students were expanded to include Pre-K 4 year olds, and now countable students have been expanded to include Pre-K 3 year olds.

Also, prior to FY13, the VT Agency of Education counted Pre-K within the Supervisory Union entity. Beginning in FY13, the VT AoE counted Pre-K enrollment within each elementary school.

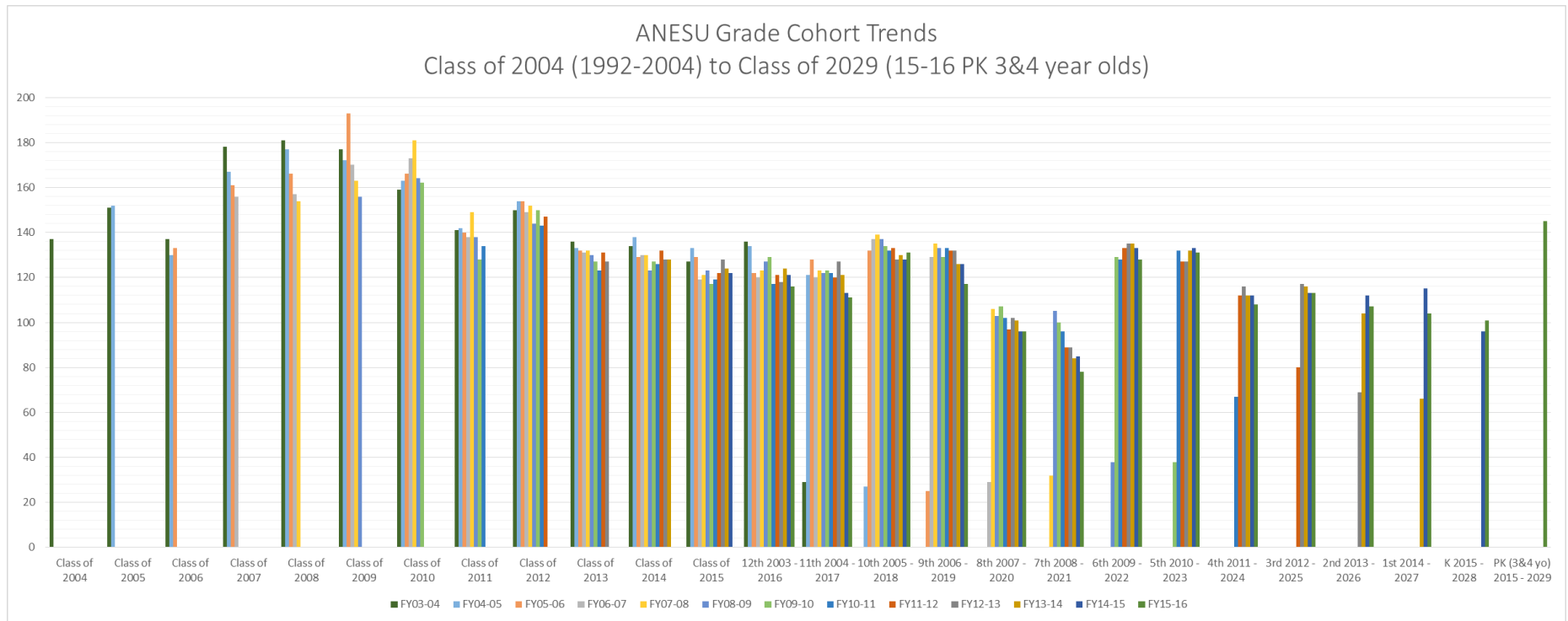
**Please note**, while total enrollment numbers have benefited from the inclusion of Pre-K students over this time, the average number of students per grade continues to decline, meaning we will continue to see smaller total enrollments in our schools.

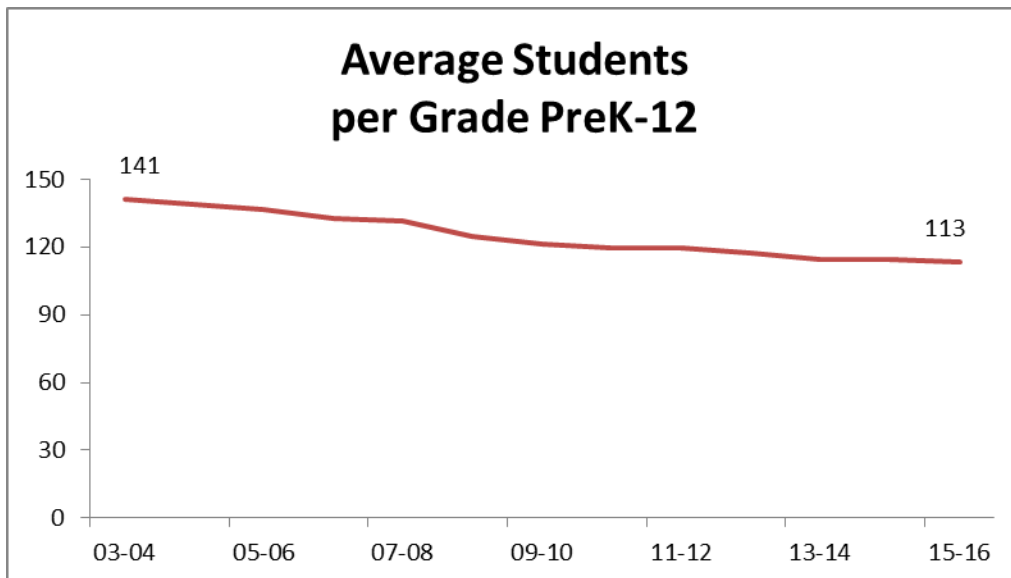
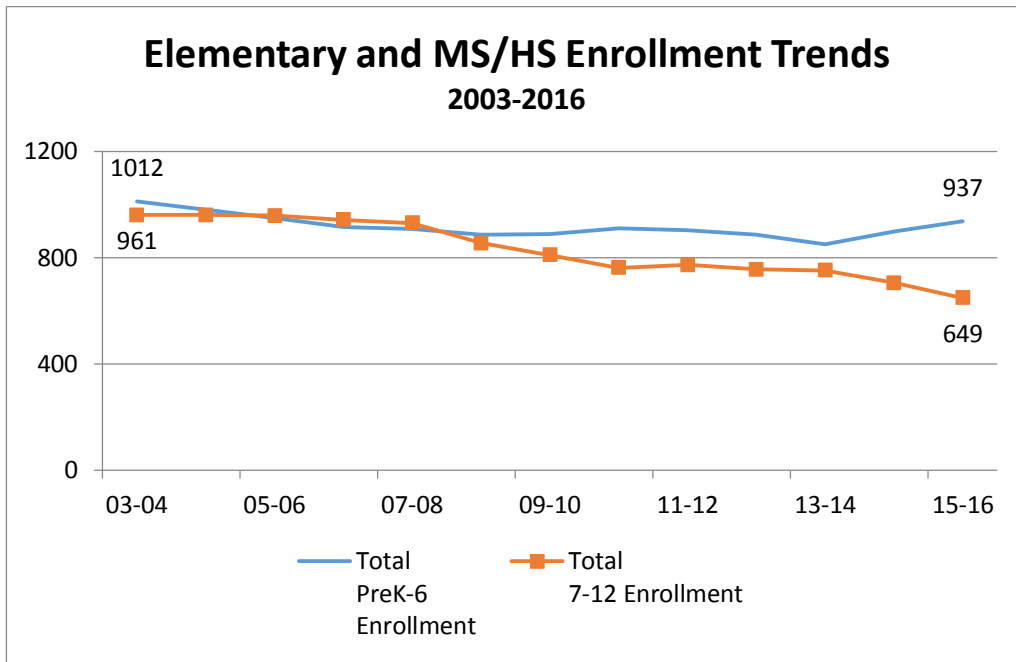




The table and graphs below demonstrate ANESU’s enrollment FY03-04 – FY15-16.

School Year	PreK (3-4yrs)	K	1st	2nd	3rd	4th	5th	6th	7th	8th	9th	10th	11th	12th	Total PreK-6 Enrollment	Total 7-12 Enrollment	Total Enrollment	Average Students per Grade
03-04	29	136	127	134	136	150	141	159	177	181	178	137	151	137	1012	961	1973	141
04-05	27	121	134	133	138	133	154	142	163	172	177	167	130	152	982	961	1943	139
05-06	25	132	128	122	129	129	132	154	140	166	193	166	161	133	951	959	1910	136
06-07	29	129	137	120	120	119	130	131	149	138	173	170	157	156	915	943	1858	133
07-08	32	106	135	139	123	123	121	130	132	152	149	181	163	154	909	931	1840	131
08-09	38	105	103	133	137	122	127	123	123	130	144	138	164	156	888	855	1743	125
09-10	38	129	100	107	129	134	123	129	117	127	127	150	128	162	889	811	1700	121
10-11	67	132	128	96	102	133	132	122	117	119	126	123	143	134	912	762	1674	120
11-12	80	112	127	133	89	97	132	133	120	121	122	132	131	147	903	773	1676	120
12-13	69	117	116	127	135	89	102	132	128	127	118	128	128	127	887	756	1643	117
13-14	66	104	116	112	132	135	84	101	126	130	121	124	124	128	850	753	1603	115
14-15	96	115	112	113	112	133	133	85	96	126	128	113	121	122	899	706	1605	115
15-16	145	101	104	107	113	108	131	128	78	96	117	131	111	116	937	649	1586	113
<b>Change in grade size 2003 to 2016</b>	<b>400%</b>	<b>-26%</b>	<b>-18%</b>	<b>-20%</b>	<b>-17%</b>	<b>-28%</b>	<b>-7%</b>	<b>-19%</b>	<b>-56%</b>	<b>-47%</b>	<b>-34%</b>	<b>-4%</b>	<b>-26%</b>	<b>-15%</b>	<b>-7%</b>	<b>-32%</b>	<b>-20%</b>	<b>-20%</b>



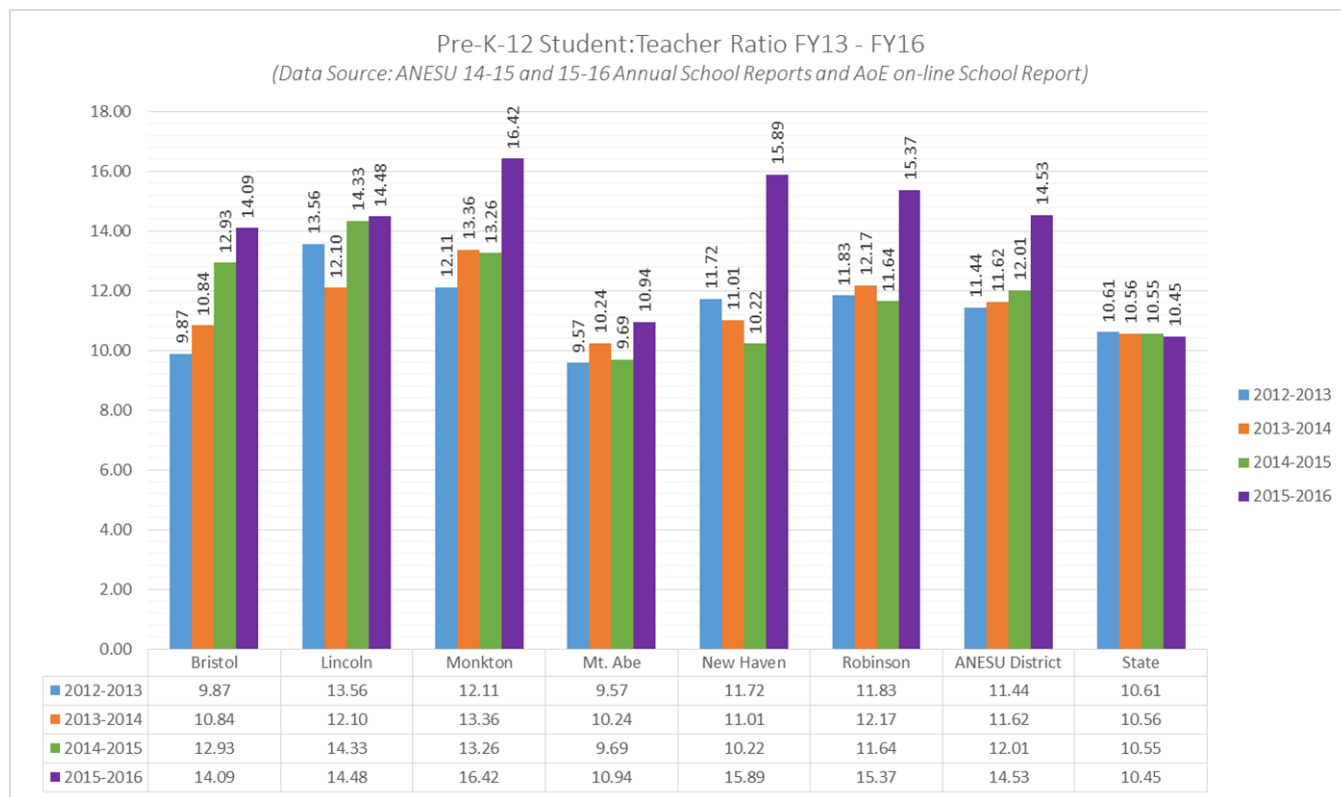


**B2 – ANESU Pre-K-12 Student: Teacher Ratio (FY13 – FY16)**

For this graph, the VT Agency of Education defines a teacher as any person licensed to be employable as a teacher who is employed as a teacher and is providing direct instruction to students in one or more elementary or secondary grades.

This graph shows that the ANESU trend of student to teacher ratio has been increasing over time. The ANESU average class size has been increasing, while the VT state trend is seeing a decrease in average class size.

In order for ANESU to engage in a policy of fiscal responsibility acceptable to our tax payers, we have had to reduce the number of teachers in classrooms, which sometimes has a negative impact on programming and opportunity. With a unified supervisory district, we can better utilize the teacher resources we have to expand opportunity and maintain academic quality.



**B3 – ANESU Elementary School Programs Comparison (FY16)**

This section provides a comparison of the elementary schools today, including general measures about each school, as well as a comparison of the staffing and programs available at each school.

**Elementary Schools State of the District Metrics at a Glance**

Prepared: 1/27/2016

School	Enrollment	Free & Reduced Lunch <sup>1</sup>	IEPs <sup>2</sup>	English Language Learners (ELL) <sup>3</sup>	Homeless <sup>4</sup>	SBAC <sup>5</sup>	
						English/Lang Arts	Math
Beeman	106	35%	16%	Y	Y	52%	46%
Bristol	271	48%	14%	N	Y	48%	31%
Lincoln	116	25%	6%	Y	N	57%	57%
Monkton	150	25%	9%	N	Y	55%	47%
Robinson	154	48%	16%	Y	Y	47%	43%

- 1 - Percent of students eligible for federal free and reduced lunch program
- 2 - Percent of students who are on individual education plans, indicating special educational needs
- 3 - Are students in the school receiving services to learn English as a secondary language
- 4 - Are students in the school in transitional housing
- 5 - Percent of 3rd -6th grade students meeting or exceeding the standard on standardized SBAC tests (tested in spring 2015)

**Elementary School Program Offerings, Staffing**

Prepared: 1/27/2016

School	Full Time Equivalent Staff (FTE)				
	Art	Music	PE	Library	Guidance
Beeman	0.3	0.3	0.6	0.4	0.5
Bristol	0.6	1.0	1.5	1.0	1.0
Lincoln	0.4	0.4	0.4	0.8	0.4
Monkton	0.4	0.4	0.6	0.7	0.6
Robinson	0.5	0.4	0.6	0.6	0.6

**Elementary School Program Offerings, Program Minutes**

Prepared: 1/27/2016

School	Average Minutes/Week						
	Art	Music	Band/Chorus	PE	Health	Library	Guidance
Beeman	55	40	Y	40	40	no data	no data
Bristol	45	39	Y	66	56	no data	no data
Lincoln	60	40	N	79	no data	60	40
Monkton	55	40	Y	80	no data	40	40
Robinson	Integrated	36	N	119	Integrated	no data	no data

**APPENDIX C– SCHOOL ASSETS & DEBTS**

**C1 – School Buildings and Site Values, Insurable Values and Square Footage**

This table shows details about the buildings and debts of the forming entities.

School	Assets - School Values						Long-Term Debt			
	Year Built	Square Footage	Insurable Values Building	Contents	Site Improvements	Total Insurable Values	Amount Outstanding 6/30/2015	Annual Principal Payment	Pay Off Date	Estimated Balance 7/1/2017
<b>Bristol Elementary School</b>	1955	56,112	8,212,900	838,454	23,500	9,074,854	0			0
<b>Lincoln Community School</b>	1952	18,200	2,045,000	381,713	21,800	2,448,513				
School Renovation Project 2011 Vermont Municipal Bond Bank							1,599,427	123,032	June 30, 2028	1,353,363
<b>Monkton Central School</b>	1952	25,853	3,219,300	517,336	31,600	3,768,236				
1998 Addition Vermont Municipal Bond Bank							292,443	60,000	June 30, 2019	172,443
<b>Beeman Elementary School</b>	1941	21,306	2,595,000	731,290	23,800	3,350,090	0			0
<b>Robinson Elementary School</b>	1940	25,227	3,678,200	320,533	21,600	4,020,333				
School Renovation Project 2008 Vermont Municipal Bond Bank							715,000	55,000	June 30, 2028	605,000
Roof Note 2014							80,000	20,000	June 30, 2019	40,000
<b>Mt. Abraham-Main School</b>	1968	151,921	24,067,900	2,137,106	50,244	26,255,250				
Wood Chip Heating Project Vermont Municipal Bond Bank							100,000	50,000	June 30, 2017	0
<b>Mt. Abraham-Garage</b>	1930	5,280	316,800	34,755	0	351,555	0			0
<b>Mt. Abraham-Learning Center</b>		1,388	184,000	85,000	0	269,000	0			0
<i>Mt. Abraham-ALL BUILDINGS</i>		158,589	24,568,700	2,256,861	50,244	26,875,805	100,000	50,000	June 30, 2017	0
<b>TOTAL</b>		<b>305,287</b>	<b>44,319,100</b>	<b>5,046,187</b>	<b>172,544</b>	<b>49,537,831</b>	<b>2,786,870</b>	<b>308,032</b>		<b>2,170,806</b>

**C2 – Status of School Facilities/Major Projects Pending**

The table below displays the major school projects pending or upcoming for each of the school buildings in Addison Northeast Supervisory Union.

<b>District</b>	<b>Major Projects Pending</b>
<b>Bristol</b>	<ul style="list-style-type: none"> <li>• <u>Exterior</u>: Soffit work on old section needs repair</li> <li>• <u>Gym</u>: new backboards</li> <li>• <u>Windows</u>: the library could use new energy efficient windows</li> <li>• <u>HVAC controls</u>: the building is run on a pneumatic system. Very inefficient. Should be upgraded to digital.</li> <li>• <u>Fire alarm panel</u>: older. Not all areas may be to code</li> <li>• <u>Stairs to parking lot</u>: need replacing</li> <li>• <u>Kitchen</u>: needs reconfiguring. Pot sink not to code</li> </ul>
<b>Lincoln</b>	<ul style="list-style-type: none"> <li>• <u>Building controls</u>: the 2011 renovation installed a very rudimentary system. Could use a major upgrade.</li> <li>• <u>Lighting</u>: the older section classrooms have older inefficient lighting</li> <li>• <u>Lunchroom</u>: there has been talk of adding a cafeteria separate from the gym</li> <li>• <u>Playground</u>: there is a current proposal for a major upgrade</li> <li>• <u>Drainage</u>: water comes into the basement underground</li> <li>• <u>Phone system</u></li> <li>• <u>Septic system</u>: many pipes are old and clogged. Pump station and controls are old.</li> </ul>
<b>Monkton</b>	<ul style="list-style-type: none"> <li>• <u>Exterior</u>: the past 3 years much has been repaired/replaced but there is still much to do.</li> <li>• <u>Grease trap</u>: too small and poorly configured</li> <li>• <u>Boilers</u>: 30 years old</li> <li>• <u>Parking lot</u>: could use paving, lots of erosion</li> <li>• <u>Windows</u>: the 1998 renovation bought some really cheap windows.</li> <li>• <u>Asbestos</u>: there is one classroom left to remediate</li> <li>• <u>Ventilation</u>: one more classroom needs a new unit</li> </ul>

<p><b>Mt. Abe</b></p>	<ul style="list-style-type: none"> <li>• A 20 year rubber roof membrane was installed in 2004. It is in good condition to date.</li> <li>• <u>Heating system:</u> The oil side has 1988 and 1994 boilers. With the woodchip plant these units don't see that much service but a fund should be started to replace them in the next ten years. This would also include replacing the circulation pumps with variable speed drives.</li> <li>• <u>Furniture:</u> much of it is dated and worn. Little to no funds have been allocated for many years.</li> <li>• <u>Ventilation:</u> There are 40+ individual room ventilation units vintage 1989. These need replacing ASAP. This combined with modern building controls will pay for itself in energy savings in a short period of time.</li> <li>• <u>Building controls:</u> Many upgrades have been done in the past few years but there is much left to do. One third of the building still operates on pneumatic controls that leak so badly a large compressor runs almost all the time.</li> <li>• <u>Door replacement:</u> many of the interior and exterior doors are very worn and shabby looking.</li> <li>• <u>Asbestos:</u> the building will likely never be free from asbestos. The 1968 flooring is generally in good shape and each year some of the spaces in the worst shape have been remediated. This should continue.</li> <li>• <u>Lighting:</u> with the new technology of LED there are large opportunities for energy savings. With an annual electric bill of \$170,000 even a 10% reduction is significant.</li> <li>• <u>Outbuildings:</u> Some of these buildings have been mothballed at this time. This does not mean that they don't still need maintenance. Decisions about their future should be made before investing money in them. Bus garage has structural issues. White House needs a new roof.</li> <li>• <u>Duct cleaning:</u> Air quality is critical to learning. Many of the ducts and coils are more than a decade old and are in need of cleaning</li> <li>• <u>Gym floor and bleachers:</u> original 1969. Unable to get parts for bleachers. Do not meet code. All needs replacing</li> <li>• <u>Pool:</u> pump and treatment system is original. Could use modernization</li> </ul>
<p><b>New Haven</b></p>	<ul style="list-style-type: none"> <li>• <u>Duct cleaning</u></li> <li>• <u>Exterior doors:</u> two more sets to replace</li> <li>• <u>Sidewalk:</u> starting to crack and shift</li> <li>• <u>Water system:</u> not to code and antiquated. Needs a major overhaul. Serves Town buildings also</li> <li>• <u>Windows:</u> all need re-glazing. 65+ large windows</li> <li>• <u>Shades:</u> many need replacing</li> <li>• <u>Carpets:</u> some need replacing</li> </ul>



<b>Starksboro</b>	<ul style="list-style-type: none"><li>• <u>Building exterior:</u> The last three summers a lot of work has been done on the exterior rot but there is a lot more to go.</li><li>• <u>Roof:</u> There is one more major section of roof to be replaced.</li><li>• <u>Classroom walls:</u> most of the wallpaper is held on with thousands of staples. Walls really need to be refinished.</li><li>• <u>Bathrooms:</u> the VCT floors should be redone with epoxy floors. Many smell bad.</li><li>• <u>Windows:</u> the 2008 renovation replaced some of the windows but not all.</li><li>• <u>Septic system:</u> the pump station and control is near the end of its useful life</li><li>• <u>Boilers:</u> they are 30+ years old</li><li>• <u>Gym ceiling:</u> needs paint</li><li>• <u>Duct cleaning:</u> some of the older section needs cleaning, including the gym</li><li>• <u>Front steps:</u> these will need a replacement at some point</li><li>• <u>Lunchroom tables:</u> old wooden benches</li><li>• <u>Key system:</u> no mastered system. Many different keys for access</li><li>• <u>Exterior doors:</u> many doors rusted out and frames around them rotted</li><li>• <u>Carpet replacement:</u> many rooms are in need</li></ul>
<b>SU Office</b>	<ul style="list-style-type: none"><li>• Half way through a 10-year lease.</li></ul>

**C3 – Current School-Specific Funds, Trusts, etc.**

Bristol Elementary School

Clinton A. Hanks Fund

The Clinton A. Hanks Fund is money left in the will of Clinton A. Hanks’ widow for the purpose of giving interest-free loans to college-bound students. The loans are to be paid back in order to maintain a balance for future students who may need assistance. Since the Fund was established, dozens of students have received loans and paid them back. The Fund is administered by the Bristol School Board.

Balance 3/1/2016    \$ 2,945.19

Marshall Trust

In 1994, Bristol Elementary School received \$8,000 from the Arleine R. Marshall Estate designated for the rental of musical instruments for the music department or for those students who cannot afford to rent such instruments. In 1997, an additional contribution of \$964 was received for this Trust Account.

Balance 3/1/2016    \$27,480.20

Danforth Trust

The Danforth Trust was established in 1985 with \$5,000 from the Walter Danforth Estate. The income from the fund is to be used as scholarships for the boy and girl in the Senior Class receiving the highest four-year scholastic average. The students must be residents of Bristol for their last four years of school.

Balance 3/1/2016    \$ 5,162.36

Lincoln Community School

Lincoln Trust Funds

Balance 3/1/2016    \$26,217.23

Monkton Central School

Marshall Trust

In 1994 Monkton Central School received \$8,000 from the Arleine R. Marshall Estate designed for the rental of musical instruments for the music department or for those students who cannot afford to rent such instruments.

Balance 3/1/2016    \$35,732.56

Mt. Abraham Union Middle/High School

<b><u>FUND</u></b>	<b><u>Balance 3/1/2016</u></b>
Acker Funds Savings	\$ 700.28
Brennan Scholarship Fund	\$ 4,734.56
Greg Clark Memorial Scholarship Fund	\$ 5,046.00
Farr Scholarship Fund	\$ 8,236.61
Hall Memorial Scholarship Fund	\$ 7,410.00
Marshall Scholarship Fund	\$ 91,733.86
Scribner Scholarship Fund	\$ 20,297.94
Warner Scholarship Fund	\$ 104,346.77

Beeman Elementary School

*None*

Robinson Elementary School

*None*

ANESU

<b><u>FUND</u></b>	<b><u>Balance 3/1/2016</u></b>
Trust Funds – Turrell	\$6,995.01

**C4 – ANESU Capital Projects Funds with Balances by School**

**Bristol**

Special Projects Fund-Plant Operations \$ 15,891.92

**Lincoln**

Special Projects Fund-Plant Operations \$ 3,886.93

**Monkton**

Special Projects Fund-Plant Operations \$ 6,826.31

Special Projects Fund-Technology \$ -

Special Projects Fund-Kitchen \$ -

**Mount Abraham**

Special Projects Fund-Interfund \$ -

Special Projects Fund-Plant Operations \$ 4,913.37

Special Projects Fund-Kitchen \$ 1,226.81

Special Projects Fund-Band \$ 4,952.01

Special Projects Fund-Repairs \$ 0.78

Special Projects Fund-Industrial Arts \$ 9,958.15

Special Projects Fund-Library \$ 2,959.98

Special Projects Fund-Driver's Education \$ 25,057.24

Special Projects Fund-Co-Curricular \$ 8,761.61

Special Projects Fund-Vehicles \$ 1,849.21

**New Haven**

Special Projects Fund-Plant Operations \$ 32,155.24

**Starksboro**

Special Projects Fund-Technology \$ 29,771.70

Special Projects Fund-Plant Operations \$ 2,892.79

*Note: All funds above will be updated in amounts at FY16 year-end closing of the accounting records*

**APPENDIX D – FINANCIAL INFORMATION**

**D1 – ANESU Pre-K-12 Equalized Pupils by School District and percentage change (FY13 – FY17)**

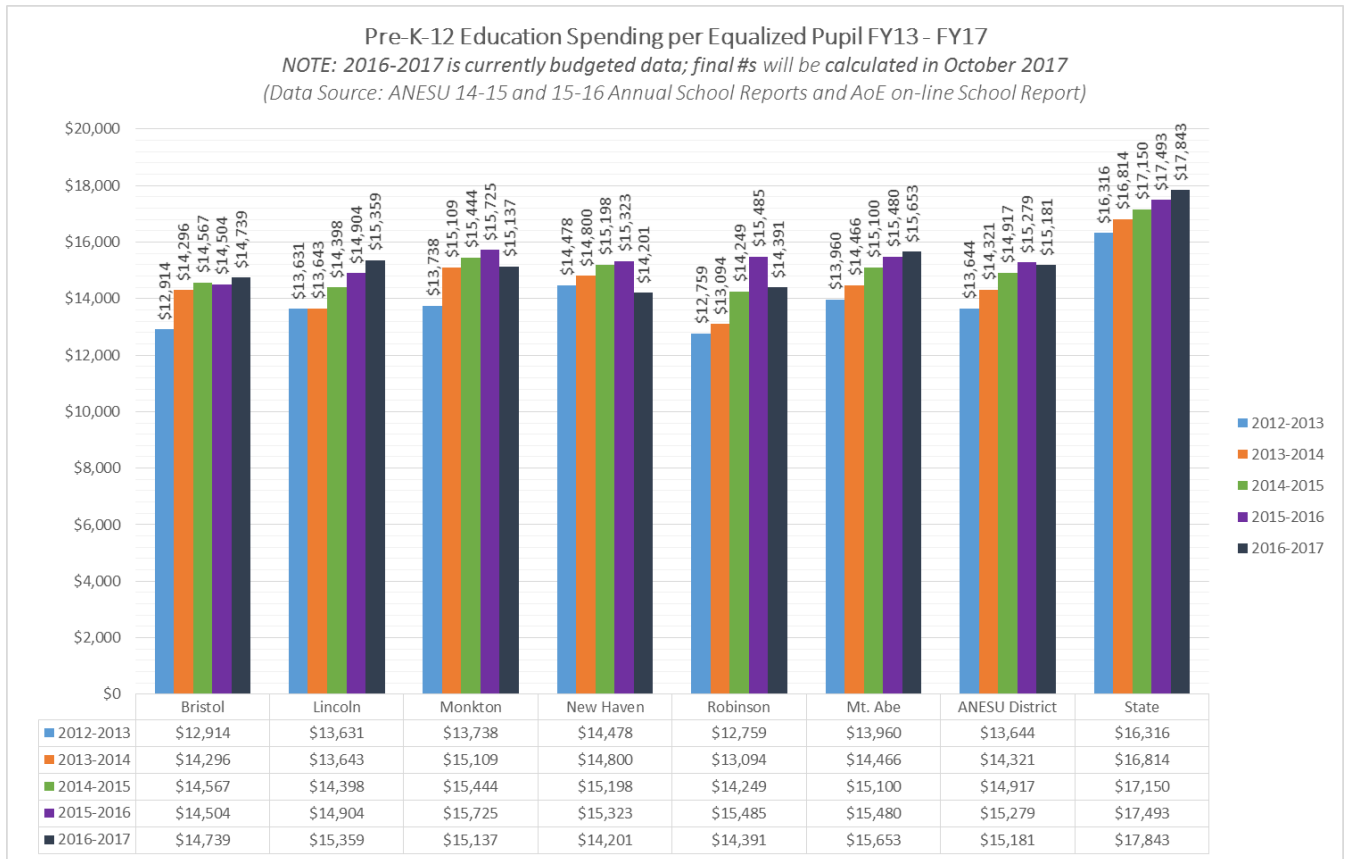
Pre-K-12 Equalized Pupils						% Change	% Change	% Change	% Change
	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	FY14	FY15	FY16	FY17
<b>Bristol</b>	291.2	283.3	277.9	281.2	286.7	-2.73%	-1.88%	1.18%	1.96%
<b>Lincoln</b>	111.0	117.6	120.8	121.3	122.2	5.98%	2.66%	0.46%	0.69%
<b>Monkton</b>	157.5	153.5	147.9	149.9	159.4	-2.53%	-3.62%	1.35%	6.33%
<b>New Haven</b>	97.3	101.0	97.4	93.2	103.2	3.79%	-3.59%	-4.31%	10.77%
<b>Starksboro</b>	164.9	165.1	159.0	158.2	173.2	0.10%	-3.64%	-0.51%	9.44%
<b>Mt. Abe</b>	834.5	830.2	823.4	795.4	743.5	-0.52%	-0.82%	-3.40%	-6.53%
<b>ANESU</b>	1,656.4	1,650.6	1,626.4	1,599.2	1,588.1	-0.35%	-1.46%	-1.67%	-0.69%

This table shows the change over time in the number of Equalized Pupils per school district and the ANESU district.

An “Equalized Pupil” is a weighted formula to approximate the different cost of educating different types of students, that considers factors such as high school vs elementary school, special education, free and reduced lunch eligible, and English language learners. Equalized pupils are also averaged over 2 years, and may only decline 3.5% in a year. An “Equalized Pupil” is defined as the long-term weighted school Average Daily Membership multiplied by the ratio of the Statewide long-term Average Daily Membership to the Statewide long-term weighted Average Daily Membership.

Elementary school Equalized Pupil calculations started including Pre-K students for each elementary school in 2016-2017.

**D2 – ANESU Pre-K-12 Education Spending per Equalized Pupil (FY13 – FY17)**



This graph shows the change over time in the cost of Education Spending per Equalized Pupil per school and the ANESU district. Education Spending per Equalized Pupil is Education Spending divided by Equalized Pupils.

This graph demonstrates that spending has increased over time. Many factors have contributed to this trend, including mandates from the state, and increased student needs.

**D3 – ANESU FY17 Pre-K-12 Budgeted Financial Data**

	<b>Enrollment</b>	<b>Equalized Pupils</b>	<b>Education Spending</b>	<b>Ed Spending per Equalized Pupil</b>	<b>Ed Tax Rate by School District</b>	<b>Equalized Tax Rate by Town</b>	<b>Common Level of Appraisal</b>	<b>Actual Tax Rate by Town</b>
<b>Bristol</b>	313	287	\$ 4,226,293	\$ 14,739	\$ 1.5193	\$ 1.5653	91.85%	\$ 1.7042
<b>Lincoln</b>	137	122	\$ 1,876,285	\$ 15,359	\$ 1.5833	\$ 1.5963	104.27%	\$ 1.5309
<b>Monkton</b>	177	159	\$ 2,412,679	\$ 15,137	\$ 1.5604	\$ 1.5858	87.74%	\$ 1.8074
<b>New Haven</b>	115	103	\$ 1,465,219	\$ 14,201	\$ 1.4638	\$ 1.5416	100.36%	\$ 1.5361
<b>Starksboro</b>	184	173	\$ 2,492,005	\$ 14,391	\$ 1.4834	\$ 1.5369	93.40%	\$ 1.6455
<b>Mt. Abe</b>	641	743	\$ 11,637,401	\$ 15,653	\$ 1.6135			
<b>ANESU</b>	1,567	1,588	24,109,882	\$ 15,181	\$ 1.5649	\$ 1.5649		

This table compares the details of budgeted FY17 expenditures and Tax Rates of each elementary and Mt. Abe school district budget as approved by voters.

The Education Tax Rate by School District is the calculated tax rate for each individual school. The Equalized Tax Rate combines each town’s elementary tax rate and the high school tax rate to make one tax rate for both schools. The Common Level of Appraisal is determined by the state and is a measure of how current property assessments are in the town. The Actual Tax Rate by Town applies the CLA to the Equalized Tax Rate, and this is the tax rate shown on your property tax bill.

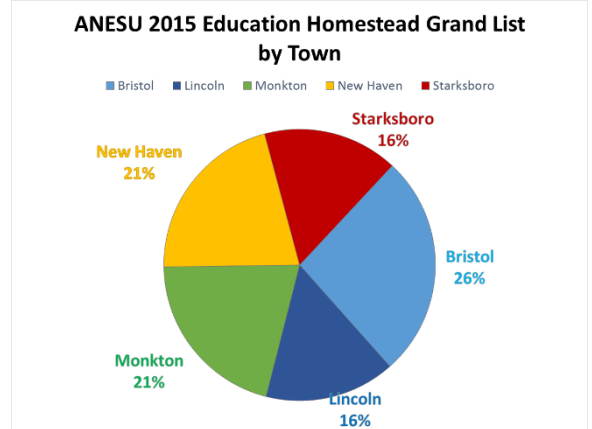
The charts below demonstrate how ANESU towns compare to each other in terms of:

- 2015 Education Homestead Grand List value. Tax rates are from education spending per equalized pupil. That tax rate is adjusted by the CLA. That adjusted tax rate is levied against the grand list to raise education tax dollars.
- 2010 US Census. This determines member proportionality of a New SD Board;
- Equalized Pupils (determines Education Spending).

**D4 – ANESU 2015 Education Homestead and Non-Residential Grand List (Not Equalized)**

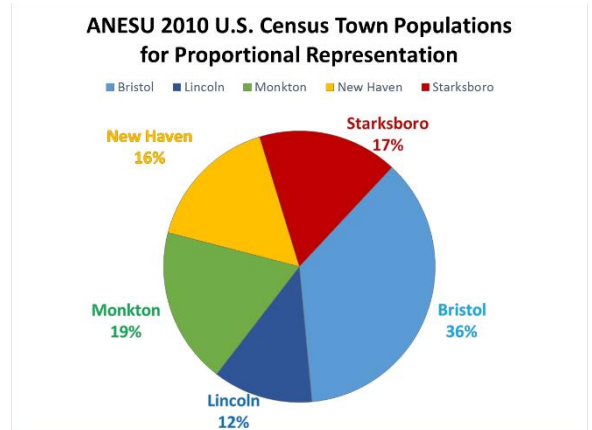
(Data Source: <http://tax.vermont.gov/content/report-not-equalized-education-grand-list-towns-2016>)

	2015 Education Grand List by Town		% of Total SU Homestead
	Homestead	Non-Residential	
Bristol	\$1,788,113.00	\$1,103,527.00	26.48%
Lincoln	\$1,050,263.00	\$ 668,672.00	15.55%
Monkton	\$1,404,080.00	\$ 454,896.00	20.79%
New Haven	\$1,422,508.00	\$1,156,094.00	21.07%
Starksboro	\$1,087,160.00	\$ 520,564.00	16.10%
TOTAL	\$6,752,124.00	\$3,903,753.00	100.00%



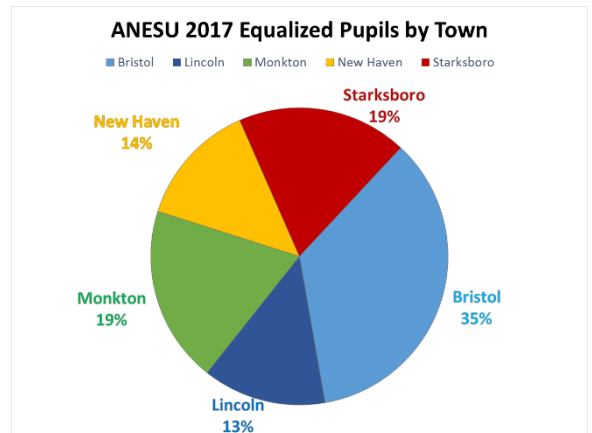
**D5 – ANESU 2010 Census by Town**

	2010 Census	% of total SU population
Bristol	3,894	36.57%
Lincoln	1,271	11.94%
Monkton	1,980	18.59%
New Haven	1,727	16.22%
Starksboro	1,777	16.69%
TOTAL	10,649	100.00%



**D6 – ANESU Equalized Pupils by Town**

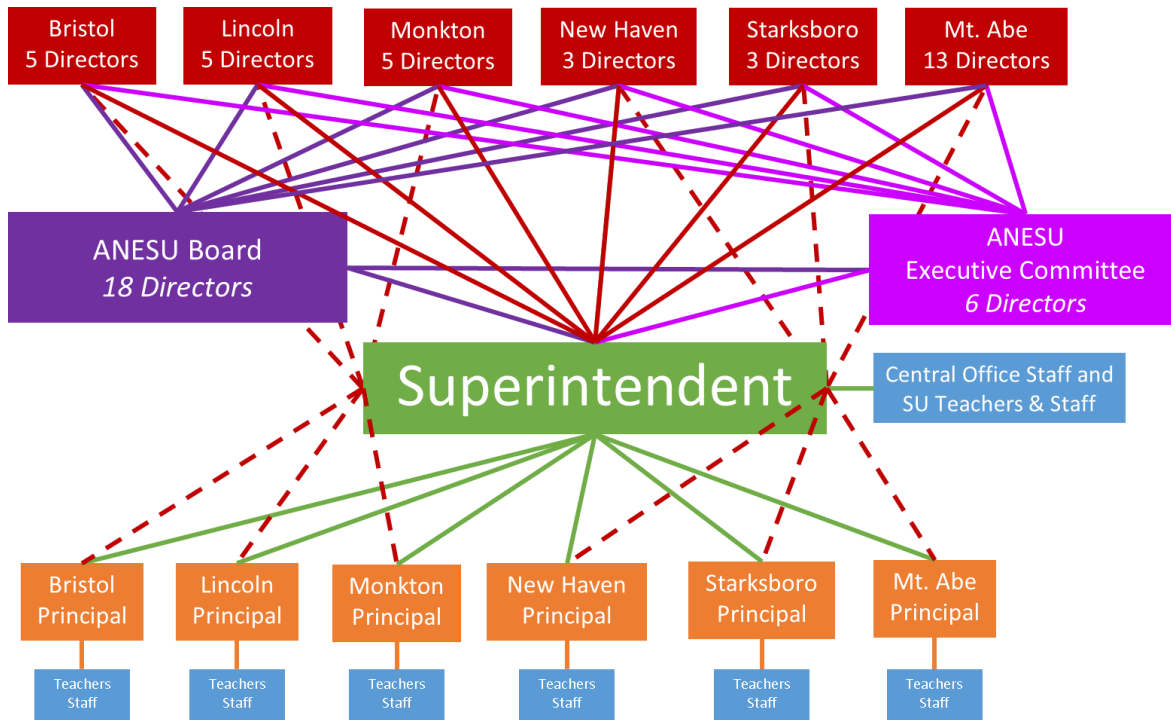
	2017 Equalized Pupils per Town	% of total ANESU
Bristol	560.45	35.29%
Lincoln	213.51	13.44%
Monkton	305.30	19.22%
New Haven	214.74	13.52%
Starksboro	294.12	18.52%
TOTAL	1,588.12	100.00%



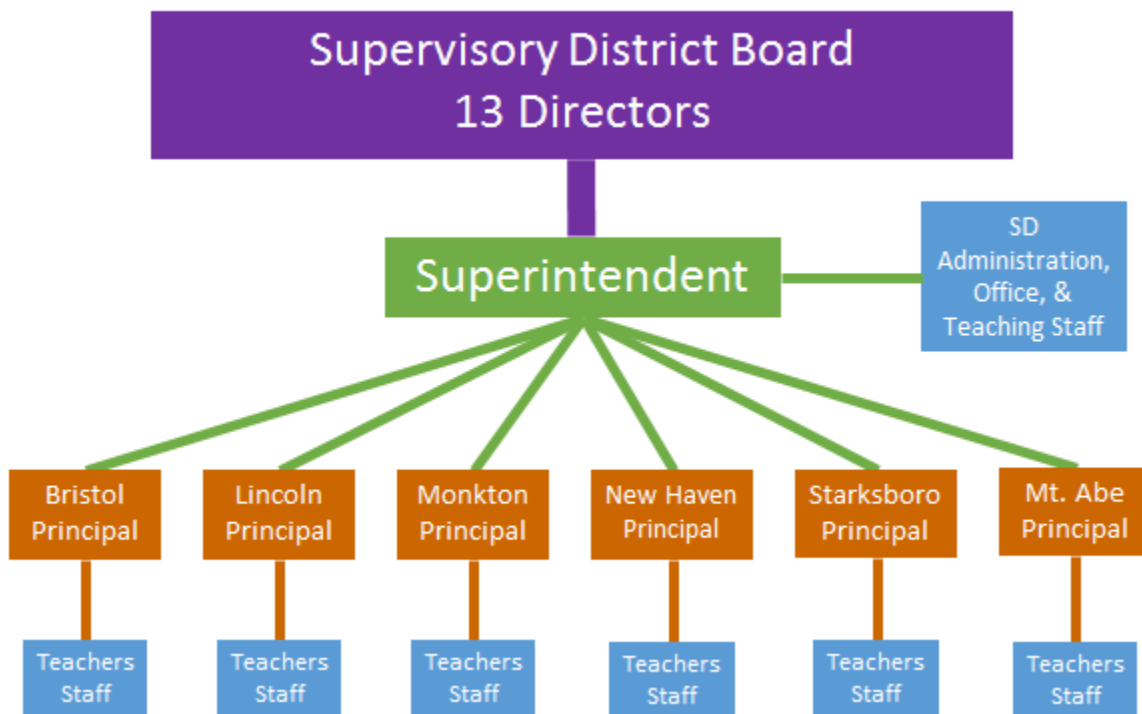


## APPENDIX E – GOVERNANCE STRUCTURE

### E1 – ANESU Current Governance Structure (~34 School Directors)



### E2 – ANESD Possible Unified Supervisory District Structure



**E3 – ANESD Estimated Board, Legal, and Audit Services cost savings based on actual FY16 expenditures**

Reducing the complexity and size of local school governance will allow some expenses to be decreased or eliminated. Examples of estimated potential reductions are shown below.

**Current Expenses**

15/16 Expenses based on June 2016 Monthly School Board Meetings

	Bristol	Lincoln	Monkton	New Haven	Starksboro	Mt. Abe	SU Board	Total Current Boards
# of Board Members	5	5	5	3	3	13	18	
<b>Board of Education Services</b>	\$16,404	\$6,661	\$8,991	\$6,826	\$6,767	\$32,995	\$11,610	\$90,254
<b>Board Treasurer Services</b>	\$1,500	\$937	\$941	\$1,077	\$1,817	\$2,435		\$8,706
<b>Legal Services</b>	\$6,153	\$3,096	\$8,784	\$1,796	\$5,153	\$15,521	\$19,007	\$59,510
<b>Audit Services</b>							\$65,670	\$65,670
<b>Totals</b>	<b>\$24,056</b>	<b>\$10,695</b>	<b>\$18,715</b>	<b>\$9,699</b>	<b>\$13,737</b>	<b>\$50,951</b>	<b>\$96,287</b>	<b>\$224,140</b>

**Projected Savings**

	15/16 Expenses	18/19 Estimate	18/19 Savings
<b>Directors</b>	<b>34</b>	<b>13</b>	<b>13 (-21)</b>
2310 - Board of Education Services (34 to 15)	\$ 90,254	\$ 37,628	\$ 52,626
Board Treasurer Services (7 to 1)	\$ 8,706	\$ 1,000	\$ 7,706
Legal Services (7 to 1)	\$ 59,510	\$ 19,007	\$ 40,503
Audit Services (reduced from 7 to 1)	\$ 65,670	\$ 26,268	\$ 39,402
<b>TOTAL</b>	<b>\$ 224,140</b>	<b>\$ 83,903</b>	<b>\$ 140,237</b>
		<b>x 4 years</b>	<b>560,949</b>

**APPENDIX F – HOMESTEAD TAX RATE COMPARISONS**

**Comparison of Projected Tax Rate with Unification and No Unification**

		<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>
<b>Bristol</b>	Homestead Tax Rate Without Unification	\$1.7042	\$1.7643	\$1.8265	\$1.8909	\$1.9577	\$2.0269	\$2.0986
	Unified District Tax Rate, with CLA, Effective FY2019	\$1.7042	\$1.7643	\$1.7219	\$1.8004	\$1.8807	\$1.9625	\$2.0462
	<b>Tax Rate Savings under Unified District Merger</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$0.1046</b>	<b>\$0.0905</b>	<b>\$0.0770</b>	<b>\$0.0644</b>	<b>\$0.0524</b>
	<b>Projected Tax Savings on \$200,000 Homestead Value</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 209</b>	<b>\$ 181</b>	<b>\$ 154</b>	<b>\$ 129</b>	<b>\$ 105</b>
<b>Lincoln</b>	Homestead Tax Rate Without Unification	\$1.5309	\$1.5834	\$1.6378	\$1.6941	\$1.7524	\$1.8128	\$1.8752
	Unified District Tax Rate, with CLA, Effective FY2019	\$1.5309	\$1.5834	\$1.5168	\$1.5860	\$1.6567	\$1.7288	\$1.8024
	<b>Tax Rate Savings under Unified District Merger</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$0.1210</b>	<b>\$0.1081</b>	<b>\$0.0957</b>	<b>\$0.0840</b>	<b>\$0.0728</b>
	<b>Projected Tax Savings on \$200,000 Homestead Value</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 242</b>	<b>\$ 216</b>	<b>\$ 191</b>	<b>\$ 168</b>	<b>\$ 146</b>
<b>Monkton</b>	Homestead Tax Rate Without Unification	\$1.8074	\$1.8613	\$1.9169	\$1.9745	\$2.0340	\$2.0955	\$2.1591
	Unified District Tax Rate, with CLA, Effective FY2019	\$1.8074	\$1.8613	\$1.8026	\$1.8848	\$1.9688	\$2.0545	\$2.1420
	<b>Tax Rate Savings under Unified District Merger</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$0.1143</b>	<b>\$0.0897</b>	<b>\$0.0652</b>	<b>\$0.0410</b>	<b>\$0.0171</b>
	<b>Projected Tax Savings on \$200,000 Homestead Value</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 229</b>	<b>\$ 179</b>	<b>\$ 130</b>	<b>\$ 82</b>	<b>\$ 34</b>
<b>New Haven</b>	Homestead Tax Rate Without Unification	\$1.5360	\$1.6052	\$1.6587	\$1.7491	\$1.8072	\$1.8674	\$1.9297
	Unified District Tax Rate, with CLA, Effective FY2019	\$1.5360	\$1.6052	\$1.5759	\$1.6478	\$1.7212	\$1.7961	\$1.8727
	<b>Tax Rate Savings under Unified District Merger</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$0.0828</b>	<b>\$0.1013</b>	<b>\$0.0860</b>	<b>\$0.0713</b>	<b>\$0.0570</b>
	<b>Projected Tax Savings on \$200,000 Homestead Value</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 166</b>	<b>\$ 203</b>	<b>\$ 172</b>	<b>\$ 143</b>	<b>\$ 114</b>
<b>Starksboro</b>	Homestead Tax Rate Without Unification	\$1.6455	\$1.7020	\$1.7604	\$1.8210	\$1.8836	\$1.9485	\$2.0156
	Unified District Tax Rate, with CLA, Effective FY2019	\$1.6455	\$1.7020	\$1.6934	\$1.7706	\$1.8495	\$1.9300	\$2.0122
	<b>Tax Rate Savings under Unified District Merger</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$0.0670</b>	<b>\$0.0504</b>	<b>\$0.0341</b>	<b>\$0.0185</b>	<b>\$0.0034</b>
	<b>Projected Tax Savings on \$200,000 Homestead Value</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 134</b>	<b>\$ 101</b>	<b>\$ 68</b>	<b>\$ 37</b>	<b>\$ 7</b>
	State Tax Incentive for Unification	\$ -	\$ -	\$ 0.08	\$ 0.06	\$ 0.04	\$ 0.02	\$ -

**Notes:**

\* These models use the below assumptions:

- State base education amount and base tax rate stay consistent at FY17 levels: \$9,701 and \$1.00
- Change in Education Spending of 3%, except 4% for Lincoln and Starksboro; based on average annual increase FY12 to FY17
- Change in Equalized Pupils of -1% for Mt Abe, 0% for Bristol, 0.5% for New Haven, 1% for Lincoln, Monkton, and Starksboro; based on trends
- Change in Grand List values of 2.0% for all towns; based on inflation
- Percent of students in elementary vs high school remains constant

\*\* Models incorporate projected budget savings of unification starting in FY2019, tax incentives from state for unification starting in FY2019, loss of small schools grants and equalized pupils hold harmless protections in FY2020

**Note:** These models are estimates and projections only. They are used only to illustrate the potential tax savings under the unification proposal. Actual tax rates for the period of FY2018 through FY2023 will be determined only after future budget proposals are approved and adopted, and will be affected by the base amount and base tax rate set by the Legislature yearly.

Additional details of tax rate projections are available on the following pages.

**Bristol**

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>Unification, effective FY19</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.7042	\$1.7643	\$1.7219	\$1.8004	\$1.8807	\$1.9625	\$2.0462	
<b>Total Tax \$ (homestead)</b>	\$2,798,948	\$2,955,553	\$2,942,334	\$3,317,995	\$3,343,402	\$3,558,731	\$3,784,558	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$178,666	\$157,744	\$136,949	\$116,706	\$97,074	\$687,139
<b>Tax \$ on \$100K home</b>	\$1,704	\$1,764	\$1,722	\$1,800	\$1,881	\$1,963	\$2,046	
<b>Tax savings on \$100K home</b>	\$0	\$0	\$105	\$91	\$77	\$64	\$52	\$389
<b>Tax \$ on \$150K home</b>	\$2,556	\$2,646	\$2,583	\$2,701	\$2,821	\$2,944	\$3,069	
<b>Tax savings on \$150K home</b>	\$0	\$0	\$157	\$136	\$116	\$97	\$79	\$583
<b>Tax \$ on \$200K home</b>	\$3,408	\$3,529	\$3,444	\$3,601	\$3,761	\$3,925	\$4,092	
<b>Tax savings on \$200K home</b>	\$0	\$0	\$209	\$181	\$154	\$129	\$105	\$778
<b>Tax \$ on \$250K home</b>	\$4,261	\$4,411	\$4,305	\$4,501	\$4,702	\$4,906	\$5,116	
<b>Tax savings on \$250K home</b>	\$0	\$0	\$262	\$226	\$193	\$161	\$131	\$971
<b>Tax \$ on \$300K home</b>	\$5,113	\$5,293	\$5,166	\$5,401	\$5,642	\$5,888	\$6,139	
<b>Tax savings on \$300K home</b>	\$0	\$0	\$314	\$272	\$231	\$193	\$157	\$1,168

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>No Voluntary Unification</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.7042	\$1.7643	\$1.8265	\$1.8909	\$1.9577	\$2.0269	\$2.0986	
<b>Total Tax \$ (homestead)</b>	\$2,798,946	\$2,955,553	\$3,121,000	\$3,295,739	\$3,480,351	\$3,675,437	\$3,881,632	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Tax \$ on \$100K home</b>	\$1,704	\$1,764	\$1,827	\$1,891	\$1,958	\$2,027	\$2,099	
<b>Tax \$ on \$150K home</b>	\$2,556	\$2,646	\$2,740	\$2,836	\$2,937	\$3,040	\$3,148	
<b>Tax \$ on \$200K home</b>	\$3,408	\$3,529	\$3,653	\$3,782	\$3,915	\$4,054	\$4,197	
<b>Tax \$ on \$250K home</b>	\$4,261	\$4,411	\$4,566	\$4,727	\$4,894	\$5,067	\$5,247	
<b>Tax \$ on \$300K home</b>	\$5,113	\$5,293	\$5,480	\$5,673	\$5,873	\$6,081	\$6,296	

\* All tax rates and amounts are based on the equalized tax rate and include town-specific Common Level of Appraisal (CLA) which will be applied to these tax rates.

**Lincoln**

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>Unification, effective FY19</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.5309	\$1.5834	\$1.5168	\$1.5860	\$1.6567	\$1.7288	\$1.8024	
<b>Total Tax \$ (homestead)</b>	\$1,676,450	\$1,768,670	\$1,728,204	\$1,843,127	\$1,963,775	\$2,090,250	\$2,222,892	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$137,794	\$125,677	\$113,473	\$101,542	\$89,779	\$568,264
<b>Tax \$ on \$100K home</b>	\$1,531	\$1,583	\$1,517	\$1,586	\$1,657	\$1,729	\$1,802	
<b>Tax savings on \$100K home</b>	\$0	\$0	\$121	\$108	\$96	\$84	\$73	\$481
<b>Tax \$ on \$150K home</b>	\$2,296	\$2,375	\$2,275	\$2,379	\$2,485	\$2,593	\$2,704	
<b>Tax savings on \$150K home</b>	\$0	\$0	\$182	\$162	\$144	\$126	\$109	\$722
<b>Tax \$ on \$200K home</b>	\$3,062	\$3,167	\$3,034	\$3,172	\$3,313	\$3,458	\$3,605	
<b>Tax savings on \$200K home</b>	\$0	\$0	\$242	\$216	\$191	\$168	\$146	\$962
<b>Tax \$ on \$250K home</b>	\$3,827	\$3,959	\$3,792	\$3,965	\$4,142	\$4,322	\$4,506	
<b>Tax savings on \$250K home</b>	\$0	\$0	\$303	\$270	\$239	\$210	\$182	\$1,203
<b>Tax \$ on \$300K home</b>	\$4,593	\$4,750	\$4,550	\$4,758	\$4,970	\$5,186	\$5,407	
<b>Tax savings on \$300K home</b>	\$0	\$0	\$363	\$324	\$287	\$252	\$218	\$1,445

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>No Voluntary Unification</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.5309	\$1.5834	\$1.6378	\$1.6941	\$1.7524	\$1.8128	\$1.8752	
<b>Total Tax \$ (homestead)</b>	\$1,676,450	\$1,768,670	\$1,865,998	\$1,968,804	\$2,070,248	\$2,191,792	\$2,312,671	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Tax \$ on \$100K home</b>	\$1,531	\$1,583	\$1,638	\$1,694	\$1,752	\$1,813	\$1,875	
<b>Tax \$ on \$150K home</b>	\$2,296	\$2,375	\$2,457	\$2,541	\$2,629	\$2,719	\$2,813	
<b>Tax \$ on \$200K home</b>	\$3,062	\$3,167	\$3,276	\$3,388	\$3,505	\$3,626	\$3,750	
<b>Tax \$ on \$250K home</b>	\$3,827	\$3,959	\$4,095	\$4,235	\$4,381	\$4,532	\$4,688	
<b>Tax \$ on \$300K home</b>	\$4,593	\$4,750	\$4,913	\$5,082	\$5,257	\$5,438	\$5,626	

\* All tax rates and amounts are based on the equalized tax rate and include town-specific Common Level of Appraisal (CLA) which will be applied to these tax rates.

**Monkton**

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>Unification, effective FY19</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.8074	\$1.8613	\$1.8026	\$1.8848	\$1.9688	\$2.0545	\$2.1420	
<b>Total Tax \$ (homestead)</b>	\$2,226,557	\$2,338,818	\$2,310,409	\$2,464,048	\$2,625,339	\$2,794,423	\$2,971,749	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$146,542	\$117,288	\$86,961	\$55,758	\$23,662	\$430,211
<b>Tax \$ on \$100K home</b>	\$1,807	\$1,861	\$1,803	\$1,885	\$1,969	\$2,055	\$2,142	
<b>Tax savings on \$100K home</b>	\$0	\$0	\$114	\$90	\$65	\$41	\$17	\$327
<b>Tax \$ on \$150K home</b>	\$2,711	\$2,792	\$2,704	\$2,827	\$2,953	\$3,082	\$3,213	
<b>Tax savings on \$150K home</b>	\$0	\$0	\$171	\$135	\$98	\$62	\$26	\$492
<b>Tax \$ on \$200K home</b>	\$3,615	\$3,723	\$3,605	\$3,770	\$3,938	\$4,109	\$4,284	
<b>Tax savings on \$200K home</b>	\$0	\$0	\$229	\$179	\$130	\$82	\$34	\$655
<b>Tax \$ on \$250K home</b>	\$4,519	\$4,653	\$4,507	\$4,712	\$4,922	\$5,136	\$5,355	
<b>Tax savings on \$250K home</b>	\$0	\$0	\$286	\$224	\$163	\$103	\$43	\$818
<b>Tax \$ on \$300K home</b>	\$5,422	\$5,584	\$5,408	\$5,654	\$5,906	\$6,164	\$6,426	
<b>Tax savings on \$300K home</b>	\$0	\$0	\$343	\$269	\$196	\$123	\$51	\$982

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>No Voluntary Unification</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.8074	\$1.8613	\$1.9169	\$1.9745	\$2.0340	\$2.0955	\$2.1591	
<b>Total Tax \$ (homestead)</b>	\$2,226,557	\$2,338,818	\$2,456,951	\$2,581,335	\$2,712,301	\$2,850,161	\$2,995,411	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Tax \$ on \$100K home</b>	\$1,807	\$1,861	\$1,917	\$1,975	\$2,034	\$2,096	\$2,159	
<b>Tax \$ on \$150K home</b>	\$2,711	\$2,792	\$2,875	\$2,962	\$3,051	\$3,143	\$3,239	
<b>Tax \$ on \$200K home</b>	\$3,615	\$3,723	\$3,834	\$3,949	\$4,068	\$4,191	\$4,318	
<b>Tax \$ on \$250K home</b>	\$4,519	\$4,653	\$4,792	\$4,936	\$5,085	\$5,239	\$5,398	
<b>Tax \$ on \$300K home</b>	\$5,422	\$5,584	\$5,751	\$5,924	\$6,102	\$6,287	\$6,477	

\* All tax rates and amounts are based on the equalized tax rate and include town-specific Common Level of Appraisal (CLA) which will be applied to these tax rates.

**New Haven**

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>Unification, effective FY19</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.5360	\$1.6052	\$1.5759	\$1.6478	\$1.7212	\$1.7961	\$1.8727	
<b>Total Tax \$ (homestead)</b>	\$2,192,894	\$2,337,490	\$2,340,732	\$2,496,387	\$2,659,796	\$2,831,098	\$3,010,752	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$122,872	\$153,530	\$132,907	\$112,320	\$91,642	\$613,270
<b>Tax \$ on \$100K home</b>	\$1,536	\$1,605	\$1,576	\$1,648	\$1,721	\$1,796	\$1,873	
<b>Tax savings on \$100K home</b>	\$0	\$0	\$83	\$101	\$86	\$71	\$57	\$398
<b>Tax \$ on \$150K home</b>	\$2,304	\$2,408	\$2,364	\$2,472	\$2,582	\$2,694	\$2,809	
<b>Tax savings on \$150K home</b>	\$0	\$0	\$124	\$152	\$129	\$107	\$86	\$598
<b>Tax \$ on \$200K home</b>	\$3,072	\$3,210	\$3,152	\$3,296	\$3,442	\$3,592	\$3,745	
<b>Tax savings on \$200K home</b>	\$0	\$0	\$166	\$203	\$172	\$143	\$114	\$798
<b>Tax \$ on \$250K home</b>	\$3,840	\$4,013	\$3,940	\$4,120	\$4,303	\$4,490	\$4,682	
<b>Tax savings on \$250K home</b>	\$0	\$0	\$207	\$253	\$215	\$178	\$143	\$995
<b>Tax \$ on \$300K home</b>	\$4,608	\$4,816	\$4,728	\$4,943	\$5,164	\$5,388	\$5,618	
<b>Tax savings on \$300K home</b>	\$0	\$0	\$248	\$304	\$258	\$214	\$171	\$1,194

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>No Voluntary Unification</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.5360	\$1.6052	\$1.6587	\$1.7491	\$1.8072	\$1.8674	\$1.9297	
<b>Total Tax \$ (homestead)</b>	\$2,192,894	\$2,337,490	\$2,463,604	\$2,649,917	\$2,792,703	\$2,943,418	\$3,102,394	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Tax \$ on \$100K home</b>	\$1,536	\$1,605	\$1,659	\$1,749	\$1,807	\$1,867	\$1,930	
<b>Tax \$ on \$150K home</b>	\$2,304	\$2,408	\$2,488	\$2,624	\$2,711	\$2,801	\$2,895	
<b>Tax \$ on \$200K home</b>	\$3,072	\$3,210	\$3,317	\$3,498	\$3,614	\$3,735	\$3,859	
<b>Tax \$ on \$250K home</b>	\$3,840	\$4,013	\$4,147	\$4,373	\$4,518	\$4,669	\$4,824	
<b>Tax \$ on \$300K home</b>	\$4,608	\$4,816	\$4,976	\$5,247	\$5,422	\$5,602	\$5,789	

\* All tax rates and amounts are based on the equalized tax rate and include town-specific Common Level of Appraisal (CLA) which will be applied to these tax rates.

**Starksboro**

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>Unification, effective FY19</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.6455	\$1.7020	\$1.6934	\$1.7706	\$1.8495	\$1.9300	\$2.0122	
<b>Total Tax \$ (homestead)</b>	\$1,670,853	\$1,762,794	\$1,788,918	\$1,907,878	\$2,032,764	\$2,163,683	\$2,300,985	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$70,834	\$54,353	\$37,557	\$20,737	\$3,913	\$187,395
<b>Tax \$ on \$100K home</b>	\$1,646	\$1,702	\$1,693	\$1,771	\$1,850	\$1,930	\$2,012	
<b>Tax savings on \$100K home</b>	\$0	\$0	\$67	\$50	\$34	\$19	\$3	\$173
<b>Tax \$ on \$150K home</b>	\$2,468	\$2,553	\$2,540	\$2,656	\$2,774	\$2,895	\$3,018	
<b>Tax savings on \$150K home</b>	\$0	\$0	\$101	\$76	\$51	\$28	\$5	\$259
<b>Tax \$ on \$200K home</b>	\$3,291	\$3,404	\$3,387	\$3,541	\$3,699	\$3,860	\$4,024	
<b>Tax savings on \$200K home</b>	\$0	\$0	\$134	\$101	\$68	\$37	\$7	\$347
<b>Tax \$ on \$250K home</b>	\$4,114	\$4,255	\$4,234	\$4,427	\$4,624	\$4,825	\$5,031	
<b>Tax savings on \$250K home</b>	\$0	\$0	\$168	\$126	\$85	\$46	\$9	\$433
<b>Tax \$ on \$300K home</b>	\$4,937	\$5,106	\$5,080	\$5,312	\$5,549	\$5,790	\$6,037	
<b>Tax savings on \$300K home</b>	\$0	\$0	\$201	\$151	\$102	\$56	\$10	\$519

	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Total</b>
<b>No Voluntary Unification</b>								
<b>Homestead Tax Rate (with CLA)</b>	\$1.6455	\$1.7020	\$1.7604	\$1.8210	\$1.8836	\$1.9485	\$2.0156	
<b>Total Tax \$ (homestead)</b>	\$1,670,853	\$1,762,794	\$1,859,753	\$1,962,232	\$2,070,322	\$2,184,421	\$2,304,897	
<b>Total Tax savings due to unification</b>	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
<b>Tax \$ on \$100K home</b>	\$1,646	\$1,702	\$1,760	\$1,821	\$1,884	\$1,949	\$2,016	
<b>Tax \$ on \$150K home</b>	\$2,468	\$2,553	\$2,641	\$2,732	\$2,825	\$2,923	\$3,023	
<b>Tax \$ on \$200K home</b>	\$3,291	\$3,404	\$3,521	\$3,642	\$3,767	\$3,897	\$4,031	
<b>Tax \$ on \$250K home</b>	\$4,114	\$4,255	\$4,401	\$4,553	\$4,709	\$4,871	\$5,039	
<b>Tax \$ on \$300K home</b>	\$4,937	\$5,106	\$5,281	\$5,463	\$5,651	\$5,846	\$6,047	

\* All tax rates and amounts are based on the equalized tax rate and include town-specific Common Level of Appraisal (CLA) which will be applied to these tax rates.



## **APPENDIX G – ANESU ENDS POLICY**

Addison Northeast Supervisory Union and Member School Districts  
(Bristol, Lincoln, Monkton, Mt. Abraham Union High, New Haven, Starksboro)

Policy Area: Board Procedures: C1

Policy Subject: ENDS Policy

Our school system exists to educate the children of Addison Northeast Supervisory Union and its member school districts of Bristol, Lincoln, Monkton, Mt. Abraham Union Middle/High School, New Haven and Starksboro, so that they can meet the challenges of lifelong learners and responsible citizens at a cost deemed acceptable by the community.

### **1. Core Subjects in a Digital and Global Environment**

To become one's personal best and a contributing member of a community, each student will demonstrate knowledge and skills within and across disciplines.

- a. Students demonstrate competence in the core subjects (English language arts, mathematics, science, social studies, arts, health, fitness and nutrition).
- b. Students interact critically and productively in a dynamic information and media rich environment.
- c. Students demonstrate competence as responsible and informed citizens of the world.

### **2. Life and Career Skills**

To become one's personal best and a contributing member of a community, each student will develop effective social and emotional skills.

- a. Students engage actively in their own learning and pursue personal interests with self-direction, independence and responsibility.
- b. Students view themselves as valuable, contributing citizens, participating actively in the community.
- c. Students demonstrate adaptability, respect, and collaboration in solving problems collectively.
- d. Students relate to each other, value diversity in others and demonstrate understanding and empathy for all.
- e. Students foster health and wellness for self and others.

### **3. Learning and Innovation Skills**

To become one's personal best and a contributing member of a community, each student will develop skills that lead to using one's mind well.

- a. Students exercise perseverance and intellectual curiosity.
- b. Students practice and hone skills for accuracy and effectiveness.
- c. Students make connections, transferring knowledge to new and meaningful situations.
- d. Students show creativity, imagination, and innovation in solving problems.
- e. Students communicate publicly what they understand.
- f. Students seek feedback and collaboration to extend knowledge and skills for continuous learning.

## APPENDIX H – ANESU 5-TOWN PROMISE

<https://drive.google.com/a/anesu.org/file/d/0B18vg0V6jn1bNDZ0eUw3bU92UHc/view?pref=2&pli=1>



Addison Northeast Supervisory Union

Bristol | Lincoln | Monkton | New Haven | Starksboro VERMONT

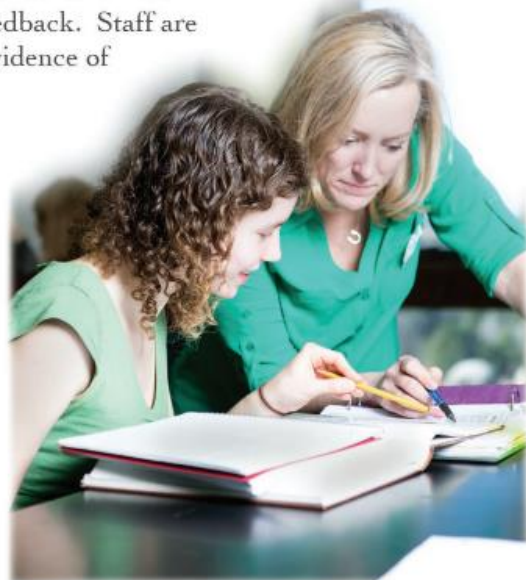
# 5 <sup>the</sup> Town Promise

## What is the 5 Town Promise?

The 5 Town Promise is the result of members of the school community looking deeply at our transformational teaching practices and connecting them to the vision and mission of the district. It is an attempt to bring clarity and transparency to the school process. It reflects the School Board's Ends Policy, which sets desired outcomes for current students and graduates. School and district leaders will continue to use input from the staff and community to develop a plan that supports the five key strategies of The Promise. This is a living document that will be continuously updated and improved based on feedback. Staff are currently working on how to gather and share evidence of The Promise in action with an emphasis on the student through innovation and flexibility, student, family and community engagement, robust student supports, and proficiency-based learning.

## Why a promise?

The Promise is a collective commitment from the school community to provide a high quality education for all students.



## **APPENDIX I – VT ACT 77 – FLEXIBLE PATHWAYS INITIATIVE**

<http://education.vermont.gov/flexible-pathways>

### **Act 77**

§941. Flexible Pathways Initiative

*“(a) There is created within the Agency a Flexible Pathways Initiative:*

- 1. To encourage and support the creativity of school districts as they develop and expand high-quality educational experiences that are an integral part of secondary education in the evolving 21st Century classroom;*
- 2. To promote opportunities for Vermont students to achieve postsecondary readiness through high-quality educational experiences that acknowledge individual goals, learning styles, and abilities; and*
- 3. To increase the rates of secondary school completion and postsecondary continuation in Vermont.”*

On June 6, 2013 Governor Peter Shumlin signed [Act77 - Flexible Pathways](#) bill which provides for:

- Expansion of the existing statewide Dual Enrollment Program
- Expansion of the Early College Programs
- Increased access to work-based learning
- Increased virtual/blended learning opportunities
- Increased access to Career and Technical Education (CTE)
- Implementation of Personalized Learning Plans (PLPs)

## **MINORITY REPORT**

### **Addison Northeast Supervisory Union Act 46 Study Committee Minority Report August 3, 2016**

#### Executive Summary

This minority report is submitted by three members of the ANESU Act 46 Study Committee (Nancy Cornell, Michael Fisher, and Herb Olson), who were appointed to the Committee by their respective boards of school directors. We want to acknowledge the hard work of the ANESU Act 46 Study Committee over the past nine months. We have no doubt as to the sincerity and good intentions of the members of the Committee. They have done the best they believed they could do, with the information that was provided to them.

Over the course of nine months of committee meetings we suggested a variety of steps for the Committee to take, and language to include in the Articles of Agreement, that would meet the following goals:

- Help ANESU schools to continue to progress toward meeting the goals of the legislation (greater equity and quality, increased cost-effectiveness, and increased transparency/accountability);
- Create a better work environment for the Superintendent: (streamlined decision-making, fewer board meetings, and more time for educational leadership) so that we can attract and retain the highest quality leaders for our schools; and
- Ensure that community members from our five towns continue to be engaged in, feel a strong connection to, and feel genuine responsibility for, their children's schools.

Because the decisions of the Committee have led to a proposal that falls far short of most of these goals, we regret that we cannot support the proposal at this time. In addition, we feel compelled to explain why we do not support the proposal that will be put before voters in November. It is important for us to be clear up front, on some key beliefs that the three of us share:

We do believe that improvements to our systems are needed and possible (we are not advocating for keeping things exactly as they are).

We do believe that the necessary improvements are possible within the current governance structure; and we also believe that it would be possible to devise an alternative governance structure that would also meet the goals bulleted above.

We do believe that there are some benefits to unifying into one school district, but, in the proposal described in the Committee's report, we don't believe that those benefits outweigh the disadvantages for our schools and our communities.

We don't believe that the proposal that will be put before voters of our 5 towns should receive approval.

In addition, we do believe that changes are needed to the school district consolidation legislation (Act 46) – changes that would make it more likely that communities such as ours can come to well-reasoned decisions about how best to proceed.

The proposal for a change in governance structure being put forward by the ANESU Act 46 Study Committee has serious flaws. The Minority Report that follows addresses:

- Problems inherent in the process the Committee used in reaching its conclusions;
- Problems with specific details of the Report;

- The value of “local control”
- An Alternative Vision for Education in the 5 Towns
- Recommendations for changes to Act 46

### Problems with the Process

- Act 46 – Timelines and misinformation
  - As a result of pervasive misinformation in the press, and the failure (on the part of state education leaders) to provide and widely publicize correct information, the majority of the Committee came to believe the following about its possible options:
    - maintaining our current structure, and showing what steps we could take to better meet the goals of Equity and Quality; Transparency and Accountability – was not a real option because it would be rejected at the state level, so there was no point in conducting that analysis;
    - proposing an alternative governance structure in which local school boards or councils retain substantive responsibility, but which streamlines decision-making, was not an option because it would be rejected at the state level;
    - the only real, safe option was to propose a unified union governance structure, OR the VTAOE would impose it;
  - The ANESU Act 46 Study Committee might have chosen to conduct more detailed analysis, and to collect more community input, before deciding on a course of action, but the short-term tax incentives that are offered for merging school districts decrease over time, and this, combined with misinformation about available options, discouraged the Committee from taking the time to thoroughly explore all possible options.
- The Committee has not adequately engaged the community.
  - The Study Committee conducted an electronic survey as its primary method of understanding how the five town communities felt about changes to school governance before making the decision to pursue the preferred unification model. That survey did not solicit community input concerning an alternative structure option.
  - The Committee made the decision not to have a community engagement meeting before deciding which model of unification to pursue.
  - While the Committee has since held two public engagement meetings, one in Bristol and one in Lincoln, the Committee has held no forums that were specifically designed to bring students into the process and has not done the necessary outreach to the five town communities to understand the various perspectives on this topic.
- Consulting Services
  - The Committee chose a consultant after reviewing two resumes provided by the VSBA. The consultant, who was trained by the VSBA, had a clear bias toward unification;

- Without any systematic analysis of our current governance structure by the Committee, the consultant advised that if we proposed keeping our current structure, this would be rejected by the VTAOE and the State Board, even though the legislation guidance posted by the VTAOE, indicates otherwise. (<http://education.vermont.gov/laws/2015/act-46> see “Unmerged Districts/Summary of Unmerged Districts”).
- A committee member suggested that it would be important to review each of the goals of Act 46, asking these questions in relation to each goal:
  - To what degree does this exist now?
  - What could we do to improve this within our current governance structure?
  - In what ways would merging make improvements more/less possible than they are now?

The Committee decided not to conduct this analysis.

The consultant told the Committee that our answers to these questions are a required part of the Committee’s report, but the answers to the first two questions do not appear in the final draft of the Committee’s Report.

- Throughout his work with the committee, the consultant’s advice to the committee was “Don’t tie the hands of the new board.” This led the Committee to reject many suggestions for Articles of Agreement that were intended to address the concerns that citizens have expressed about the possible disadvantages of consolidation.
- Throughout his work with the committee, the consultant repeatedly discouraged the committee from considering any alternative governance structure.

#### Problems with the Proposal being Recommended for Voter Approval

- Equity and Quality
  - The Report claims benefits of merging (such as more access to Expanded Learning Programs, more fine arts programming in our elementary schools) that would likely only be possible with additional resources,
  - The Report seems to indicate that merging would lead to the extension of Expanded Learning Programs (summer and after school) across all schools, yet no specific evidence is provided that indicates how the change in governance would, in itself, lead to more equity in this area.
  - The Report does not adequately acknowledge the important programs and activities underway right now, within the current governance structure, that are designed to lead to greater equity and improve the quality of education.
  - Although the Report claims that unification will enable greater equity and quality, in the course of its deliberations, the Committee decided not to examine this question “to what extent could greater equity and quality be achieved within the current governance structure.”
  - The Report claims equity and quality benefits of merging that can also be realized within the current governance structure e.g.:
    - “bringing custodial staff together to tackle a particular short-term project”;
    - “assemble a team of skilled practitioners currently spread out across different buildings...to help coordinate the integration of technology”;
  - The Report claims equity and quality benefits of merging that already exist within the current governance structure, i.e.:

- “one mission, vision, and an articulated continuous improvement plan”;
    - “build upon the best practices already happening in our schools and to work on making them more accessible to all of our learners in all of our schools”;
    - “coordinate technology support personnel to fix issues, maintain equipment and save money through bulk purchasing”;
  - The Report fails to address a critical component of “statewide equity”, as promised in Act 46: how to lift sometimes less affluent, rural schools to be on par, in terms of educational equity and quality, with sometimes more affluent, urban and suburban schools?
- Efficiency and Sustainability
    - There is no question that managing costs across a larger organization will produce some efficiencies. However, the savings (\$140,237) projected in the report are modest – only .058% of the combined FY ’17 budgets for ANESU and its member school districts. This may be due to the fact that ANESU has already consolidated services in the areas of Special Education, Transportation, Information Technology and Food Service (and has been able to accomplish this under its current governance structure).
    - The report notes that merging would enable the transfer of staff from one school to another. However, the report does not address the possible disadvantages of current Reduction in Force and Recall Rights rules becoming applicable across schools within the unified district. The disadvantages include the possibility that the superintendent’s and the principals’ authority to hire the best teachers will be somewhat diminished. While there might have been ways for the committee to address this disadvantage in Articles of Agreement, or at least to call attention to concern about this issue, the Committee chose not to do so in this Report.
    - The Report claims efficiency and sustainability benefits that would enable Supervisory Union leadership to focus more on teaching and learning. These are real benefits, but the Committee did not analyze the extent to which steps could be taken within the current governance structure to achieve the same result.
    - The Report claims efficiency benefits that already exist within the existing governance structure, e.g.:
      - “a teacher fluent in the use of a particular teaching strategy in one school can be a resource to a teacher in another school.”
  - Transparency and Accountability
    - The Report fails to acknowledge that ANESU’s Policy Governance model, which is currently applied across the supervisory union, already helps to streamline decision making, establishes clear expectations for the superintendent, establishes clear lines of authority, and clear roles and responsibilities for boards. The ANESU Policy and Governance Committee, established by the ANESU Board, has been working tirelessly, with facilitator Val Gardner, to further refine and streamline our Policy Governance procedures. Although this model is still being perfected, it is designed to achieve many of the benefits to merging that are claimed in the report.
    - The Report claims that one budget will help our school system be more transparent and accountable to taxpayers. That point is arguable. The Committee

decided against a proposed Article of Agreement that would promote transparency by portraying the budget in two ways: as one budget for the Supervisory District; and as one budget for each of the schools plus the budget for the Superintendent's office.

- The Committee rejected a proposed Article of Agreement that would have required the Supervisory District Board to report to taxpayers on the degree to which the savings projected in the report are actually realized.
- The Report does not make clear that the new Supervisory District Board can, without a vote in our communities change any article that is not addressed in the warning described in Article 10.
- The Report claims transparency and accountability benefits that would enable Supervisory District leadership to focus more on teaching and learning. These are real benefits but the Committee did not analyze the extent to which steps, such as changes to the administrative structure, could be taken within the current governance structure to achieve the same result.
- Tax impact – Appendix F
  - Any discussion of what are the positive and negative aspects of consolidating our school districts needs to include consideration of the impact of consolidation on property taxes. Unfortunately, the information provided to the Committee is missing important components.
  - The Report's tax impact information shows, for each town, the estimated tax savings on homestead property in several valuation increments: \$100,000, \$150,000, \$200,000, \$250,000, and \$300,000. For example, in Starksboro during the first year of consolidation, a homestead valued at \$200,000 would see a tax savings from state incentives of \$129, thereafter lowering to a tax savings of \$38 for the final year of state tax incentives. The authors of this Minority Report believe that these meager tax savings are not worth the cost of what will be lost with consolidation.
  - The Report fails to answer the following important tax impact questions:
    - What is the tax impact for residents whose taxes are calculated with a household income factor? While it may not be possible to show tax impact information for each possible income and property tax variation, it should be possible to see some "typical" income and property tax scenarios. According to an Agency of Education "fact sheet" issued in June, 2016, tax savings for income-based property taxes will be lower than tax savings for assessment-based property taxes (even though savings on a percentage basis is about the same).
    - Different towns have higher and lower levels of debt. Some town school districts are anticipated to have significant bonded debt on July 1, 2017, while others are anticipated to have no debt. What are the tax impacts on taxpayers in each town, positive and negative, resulting from the fact that after consolidation all towns will be responsible for aggregated debt of all former districts?
    - Different towns also have different levels of education spending. For example, the highest level of education spending per equalized pupil in FY 2017 is estimated at \$15,137, versus \$14,201 for the lowest level of education spending. What are the tax impacts, positive and negative, resulting from the fact that after consolidation all towns will be



responsible for the aggregated education spending of all of the former districts?

- These incentives are not “free”, because they are supported by statewide taxes. What is the tax burden required to raise state funds for these incentives? What is the net tax savings for residents when the additional tax burden is subtracted from tax incentives?
- What is the tax impact after incentives end? Unless real education spending is significantly reduced, which appears unlikely in light of the meager projected cost saving, tax rates will rise back to approximately their pre-incentive levels.

### The Value of “Local Control”

In the statewide discussions concerning Act 46 and whether to consolidate our schools, the proponents of consolidation typically talk about the virtues of a modern, centralized school system versus an archaic system of “local control”. We see the issue rather as a question of what system of school governance will be best for our students: (1) a larger, centralized system conferring greater authority and control to a Superintendent and a single board; or (2) the current system, with specific improvements, where local boards have a direct and close relationship with the community; or (3) an alternative governance structure that addresses areas that need improvement without jettisoning what is good about the current system.

Our personal belief is that the local community relationship with its school is a unique and extremely valuable feature of the Vermont community that will be diminished if school consolidation were to happen. These strong community relationships support schools and students and families at a personal level, and also support schools when budgets are considered. But don’t take our word for it! Listen to our neighbors who offered comments on the Committee’s Survey:

*“I do not believe in a ‘one size fits all’ mentality and I think that centralization, unification would likely lead to a lack of responsiveness to individual students and communities.”*

*“I am very much against taking school control out of the local setting and putting it in the hands of people far removed from our local community.”*

*“Act 46 threatens both our schools and the vitality of each ANESU community. To respond to the goals of each student, each school has to design programs that fit the purposes students discover through experience in their schools, not the general aims adopted by a large district or agency that may not actually help any individual move toward adult independence. Large-scale education policy, created by people with no common vision, often overlooks the powerful resources within the community, as well as the energetic drive that each of us feels when we are developing skills and talents that take us where we want to go, not where some administrative group tells us to go.”*

*“Larger school and single board mean less accountability and transparency and less connection between schools and the community.”*

*“Not clear to me that a simplified governance is a good thing. The governance model used in the past led to disastrous results for the whole 5-town community.”*

*“While I understand there are potential benefits, I do not see many of them coming to fruition in*

*the ways our legislators want. I am much more concerned with the losses on the local level than with any possible benefits.”*

*“I would be concerned about the funds from all the schools being controlled by one Board and making sure that each school gets the correct share and amounts needed to support their school.”*

*“I used to feel that people clamoring for local control were just unprogressive and afraid of change. After watching the miasma that has developed in Montpelier in the last 30 years, I have zero interest in giving them more control.”*

*“I'm not only a District taxpayer, but also an employee of one of the town school districts. My personal experience is that communication pathways suffer when operations are "centralized." Decisions are made at the District level, but are not clearly communicated to staff at the individual schools. I've seen this happen in the areas of technology and special education.”*

*“Highest concern is that the needs of the students will become even more lost. Unification seems to serve the needs of the town, governing bodies, taxpayers, and losses sight of the fact that children, more than ever before, need an enriching and positive, calm and small family like community in which to learn and grow.”*

*“The essential and historical character of Vermont is centered around each individual Town, and it seems that there are ways to protect and cherish that heritage and legacy, rather than trying to impose a ‘New York City’ perspective.”*

*“Given that community ownership, pride and involvement in its local school is the most important determining factor in a school’s success every effort should be made to maintain that!”*

*“I understand the need/desire to simplify decision making, but when this united structure comes at a cost to personal students' growth and education, it is concerning.”*

*“I would like to see a proposal that seriously addresses cost and equity issues, but hopefully does retain some autonomy at the town level.”*

*“I'm not convinced this move will actually be beneficial. Schools need to be accountable for results. Moving authority further away from individual schools does not give schools the decision making authority they need to execute policies that are efficacious at the student teacher level.”*

Of course, not all people feel this way. Many people agree with the sentiments expressed in the Study Committee’s Report, and feel that the potential benefits of centralization outweigh the cost in terms of the loss of a strong community-school relationship. The important point, however, as articulated in the above comments, is that we lose something valuable with consolidation, even if we might disagree as to how valuable it is. Before we jump in we need to be sure that the trade-off is worth it.

### We Can Do Better: An Alternative Vision for Education in the 5 Towns

For the reasons outlined above, we recommend that the Vermont Board of Education reject the proposal from the ANESU Act 46 Study Committee. We recommend that the Committee reconvene and pursue both of the following options simultaneously:

- Analyze how we can meet the goals of Act 46 by making specific improvements within our current governance structure
  - From listening to others, and based on our own observations, right now decision-making in our Supervisory Union seems to be more difficult and cumbersome, at times, than it needs to be. We can envision making improvements to our current governance structure (in addition to those already in progress) by delegating many decisions from local boards to the Supervisory Union Board or its Executive Committee. We can also envision more clearly delineating roles and responsibilities between the Superintendent and the local boards; increasing Policy Governance expertise and understanding on the part of board members and our communities; and considering changes in management structure so that more time and energy can be focused on implementing useful educational policies and programs.
  
- Develop a proposal for an alternative governance structure
  - It is possible to envision a unified governance structure, with one supervisory board, that establishes elected local school councils, or boards, that have substantive advisory responsibility, and perhaps collective veto authority, in some key areas. As to what should be retained at the local level, there must be a meaningful role for the local community. Without a meaningful role in governance the community-school relationship will be significantly diminished. We want to hear from our friends and neighbors about just what that “meaningful role” should be. In all likelihood, we would want the local boards, or school councils, in collaboration with the Superintendent, and with school-based search committees that include community members, to retain responsibility for hiring school principals. Surely the local community should retain some voting role in establishing the budget for the elementary school. We’d recommend a structure in which the two towns in our SU that vote their elementary school budgets on the floor of town meeting (Lincoln and Starksboro) are still able to do so, at least to provide advice to a supervisory board. We may also learn that our communities wish to establish new structures that preserve and further improve communications and responsiveness to families and students.

Recommendations to the Vermont Legislature, the VTAOE, and the VT Board of Education

- Extend the timelines of Act 46; consider establishing a hiatus in implementation of Act 46 in order to sort through problems and confusion related to this legislation.
- Clarify and widely publicize what choices and what flexibility Act 46 study committees, and the communities that they represent, actually have.
- To assist communities in understanding and weighing options, and in developing proposals in response to Act 46, hire and train a cadre of objective, unbiased consultants who are skilled facilitators.
- Make sure that all districts conduct a robust evaluation of all options before coming to the State Board with any proposal – regardless of whether it is a merger proposal under 16 V.S.A. Chapter 11 or is a proposal by a non-merging district or a group of districts for an

“alternative structure”. In reviewing proposals to determine whether they will be approved, hold them all to the same standards.

- Offer tax incentives for any approved proposal, regardless of whether it is a merger proposal under 16 V.S.A. Chapter 11 or is a proposal by a non-merging district or a group of districts for an “alternative structure”.
- Provide clear, public information about how the funds to pay for Act 46 tax incentives are being raised, and how this affects projected tax rate savings for districts that choose to consolidate, and how it affects tax rates for districts that choose not to consolidate.
- Change the law so that it is not required that voters elect Supervisory District Board Members at the same time that they decide whether to create a unified district.
- Require a thorough evaluation to determine the extent to which Act 46 achieves its stated goals.
- Address the issue of equity across schools statewide, not just within supervisory unions. Providing “substantial equity in the quality and variety of educational opportunities statewide” is a critical goal of Act 46. We applaud Act 46 for setting this goal by speaking of *statewide* equity and quality as the appropriate reference point.

Respectfully Submitted,

Nancy Cornell  
[ncornell7@gmail.com](mailto:ncornell7@gmail.com)  
802-453-2681

Mike Fisher  
[mfisher@gmavt.net](mailto:mfisher@gmavt.net)  
802-989-9806

Herb Olson  
[herb.liz@gmavt.net](mailto:herb.liz@gmavt.net)  
401-829-1678

## **CLOSING THOUGHTS OF THE ACT 46 STUDY COMMITTEE**

The Act 46 Study Committee recommends a voluntary unification under Act 46 because we believe it presents the best opportunity for all our students. The concerns raised in the minority report have been discussed by the Committee. Many expert and community member opinions were considered in these discussions. The Committee made all decisions by two-thirds majority, ensuring that all decisions had the support of a super-majority of the Committee. We agree that unification is not perfect, and it will not solve all of the challenges our schools face. Unification will continue to move us in the right direction, complying with Act 46 and offering the best learning opportunities for our children. A unified district offers more flexibility in decision making to allow greater equity and we believe greater quality. In addition, voluntary unification comes with tax reductions and financial savings. All of the Supervisory Unions that border ours have already passed unifications, most of these following the preferred model of a unified supervisory district we've recommended. We hope you will vote on November 8<sup>th</sup>, and that you will vote for the choice that you believe offers the best future for all of our kids.

Throughout this process, the Committee was advised by many experts from different backgrounds. These included our attorney, the Vermont School Boards Association (VSBA) Executive Director and Act 46 Implementation Project Manager, contacts at the Agency of Education (AOE), our VSBA consultant, and Interim Superintendent Armando Vilaseca, the former Secretary of Education. These experts provided the Committee with many different perspectives on the benefits of unifying under Act 46. These experts also advised us that not merging or pursuing an alternative structure was not likely to be accepted by the State Board of Education for our Supervisory Union.

In addition to varied expert advice, the Committee also conducted a community survey in April, and considered the findings in our work. Overall the survey respondents were in favor of unification, with 71% of the 402 respondents either somewhat likely or highly likely to support unification. Respondents were excited about the possibility that unification could encourage collaboration and knowledge sharing between staff and schools; expand programs using shared staff across multiple schools; simplify administration of staff, budgets, and programs; and offer tax rate incentives and financial savings.

The concerns raised in the minority report have been discussed by our Committee over the nine months of this process. The Committee added two ANESU-specific Articles to address these concerns and customized language in other Articles. Overall, the Committee tried to keep the Articles broad, like our Constitution, to include only principles that would form the foundation of our new district. Many other ideas were discussed that are great ideas for the new district. These ideas need to be written into policies by the elected board. Policy development follows specific steps so many groups can be part of the process. Adding items to the Articles that truly

belong in policy interferes with the policy development process and oversteps the authority of this Committee.

The Committee had lengthy discussions about community concerns about loss of local control, and we have worked to address these concerns as we redefine what “our community” means to our schools. Across the state, there are real concerns about how larger school districts will affect the local control of our schools. This is a period of change, and change is often uncomfortable. But change also presents new opportunities. Unifying our schools presents the opportunity to think about the education of all the students in our five town community. All of these students join together in seventh grade when they enter Mt. Abe. Unifying will help ensure similar standards and educational opportunities at the elementary level to lead to better success for all students at Mt. Abe. Unification continues progress already made down this path.

In addition, the Committee drafted our Articles of Agreement to address concerns about local control. Specifically, we added Article 15 emphasizing the importance of local input and public participation. We also customized language in Article 7 to add subsection (d) to maintain current practices of local use of buildings and grounds and local fundraising support for individual schools. And we revised Article 14 to require town voter support before a school can be closed. Collectively, we believe that these changes to the Articles will help direct the new unified board to highly value local input.

The Committee disagrees with the minority report’s statement that not merging or recommending an alternative structure are reasonable possibilities for our Supervisory Union under Act 46. In fact, Act 46 is quite clear that unification is the preferred approach, and recommending a non-merger or alternative structure are exceptions. There are no tax savings or financial incentives in these approaches. And they leave our communities in a place of uncertainty because there is no provision in Act 46 to allow communities to vote on a proposal not to merge. Additionally, expert advice from multiple sources has told the Committee that aspects of the alternative structure referenced in the minority report are not legal under current Vermont education law. Instead, if our communities pass a unification proposal, we can (1) unify under our terms, (2) receive tax rate reductions and financial incentives, and (3) focus our attention on providing equitable educational opportunities for our learners.

Finally, the Committee believes that unification under Act 46 does provide important financial benefits for our schools and communities. While our projected savings are not huge, they are savings that would not be achieved without unifying. The Committee has intentionally tried to only project savings that are very likely to be achieved. It has been our intention not to imagine every penny that could be saved in the best case scenario. We would rather see the new board report greater than expected savings, rather than over promise the savings to our voters. In addition to the financial savings of unification, a voluntary merger passed by July 1, 2017 also

carries financial benefits of a one time \$150,000 transition facilitation grant, keeping our small schools grant (New Haven, valued at \$72,000/year in FY17), and our communities see a combined tax savings of \$2.4M in FY19 to FY23. These are real dollars that can fund programs in our schools without having to raise these dollars by taxes in our communities. If we choose not to voluntarily unify or we choose to recommend an alternative governance structure, we lose these savings and need to raise this money by taxes in our communities.

In summary, unifying our school governance provides many benefits. As with any change, there are also challenges. The Act 46 Study Committee has met extensively in developing its recommendation to unify, and many concerns have been discussed and addressed. We have worked to address concerns about local control in our Articles of Agreement. Other ideas will be passed to the new board for their policy work. The Committee believes that unification under Act 46 provides the greatest opportunities for both efficiency and educational opportunities for our students, and it offers financial benefits for our taxpayers. Act 46 is the law, and it has specific requirements for school districts. Even if you don't agree with the law, that doesn't change what the law requires. The Committee has worked hard to bring this recommendation to voters. It is time to let the voters weigh in. We hope that this report has helped you understand why the Committee is recommending unification at this time.

Steven F. Stitzel - sstitzel@firmspf.com - (802)660-2555

September 8, 2016

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

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

Re: Proposed Addison Northeast Supervisory Union Consolidation

Dear Board Chair Morse and Secretary Holcombe:

This office represents the Addison Northeast Supervisory Union (“ANESU”) and its member districts. This letter is written on behalf of the ANESU Act 46 Study Committee which is recommending formation of a supervisory district consisting of the member districts of ANESU.

I am writing to address the constitutionality of board member allocation among the five (5) towns that will be members of the proposed Addison Northeast Supervisory Union consolidation. The Articles of Agreement provide for formation of a thirteen (13) member governing board with members having equal (non-weighted) votes. Using the most recent census data board members will be allocated to the five (5) member towns on the basis of population using the “highest remainder” methodology. This will ensure that each member town will have at least one member on the board and all thirteen (13) seats will be allocated. The initial allocation will be as follows:

Bristol	5
Lincoln	2
Monkton	2
New Haven	2
Starksboro	2

The Equal Protection Clause of the US Constitution has been interpreted to require that elected governmental boards be composed of members who, ideally, represent similar numbers of constituents (based on population). The degree of “similarity” is measured by calculating deviations from what is “ideal”. For



example, a five (5) member board elected to represent five (5) districts, each with a population of one thousand (1000), would be “ideal”. On the other hand, if the same five (5) member board represented districts with populations of 1000, 1000, 1000, 750 and 1250, respectively, one district would be 25% below the “ideal” and one would be 25% above. This results in an average population deviation of 10% and a maximum population deviation between two districts of 50%.

The combined population of the five (5) member towns of the Addison Northeast Supervisory Union is 10,649. Ideally, then, each member of the thirteen (13) member board would represent a population of 819. The proposed allocation results in the following deviations:

		Pop. per member	Deviation from 819
Bristol	5	779	-4.9%
Lincoln	2	636	-22.8%
Monkton	2	990	20.9%
New Haven	2	864	5.4%
Starksboro	2	889	8.5%

This results in an average population deviation of 12.42% and a maximum deviation of 43.3% (based on Lincoln and Monkton).

The US Supreme Court has recognized that significant deviations from what is ideal may be permissible where allocations are made to preserve representation along historic political boundaries such as, cities, towns, counties and similar entities. Brown v. Thomson, 462 U.S.835 (1983) addressed the constitutionality of Wyoming’s legislative reapportionment in 1981. Under the plan, each county was allocated at least one representative. The “ideal” population per representative was 7,337. Niobrara County with a population of only 2,924 was 60% below the ideal population. The average deviation for the reapportionment was 16% with a maximum deviation of 89%. Despite these deviations, the Court found the apportionment constitutional noting “. . . Wyoming’s longstanding and legitimate policy of preserving county boundaries.” Id. at 847.

The role of Vermont towns in the organization and governance of public schools finds its roots in Chapter II, Section 68 of the Vermont Constitution which provides that “... a competent number of schools ought to be maintained in each town....” Over the past two centuries and countless statutory changes, public schools have emerged and survived in most towns, forming strong ties with their

Board Chair Morse and Secretary Holcombe

September 8, 2016

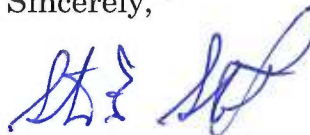
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host communities. The board member allocation proposed in this case preserves Vermont's "longstanding and legitimate policy" of respecting the political boundaries of the towns that have established and long supported their public schools.

That the proposed board member allocation meets the constitutional standards of Brown v. Thomas is obvious. First, the population deviations of 12.42% (average) and 43.3% (maximum) are far smaller than those involved in Brown. Also, the preservation of political boundaries for purposes of representation are no less significant. The only difference is in the number of representatives allocated to the entity with the smallest population; in Brown, Niobrara County was allocated only one representative while Lincoln is allocated two. However, this allocation continues in effect an allocation that has existed in recent years for the Mt. Abraham Union High School District Board.

To conclude, it is our opinion that the method for allocating the thirteen (13) members of the proposed board satisfies requirements of the Equal Protection Clause of the US Constitution, as such have been articulated by the US Supreme Court.

Sincerely,



Steven F. Stitzel

SFS/gc

cc: Jennifer Stanley, ANESU Act 46 Study Committee Chair  
Patrick Reen, ANESU Superintendent