State Board of Education
Date: January 17, 2018
Item T

AGENCY OF EDUCATION
Barre, Vermont

TEAM: Governance Team

ITEM: Will the State Board of Education find that the proposed unified union school district formed by two member districts of the **WINDSOR SOUTHEAST SUPERVISORY UNION** (WSESU) 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 Windsor Southeast Joint 706 Study Committee on District Unification (Study Committee)?

RECOMMENDED ACTION:

1. That the State Board of Education finds that the proposed formation of a new unified union school district by two member districts of the WSESU, provisionally to be named the WINDSOR/WEST WINDSOR UNIFIED UNION SCHOOL DISTRICT, is "in the best interests of the State, the students, and the school districts" pursuant to 16 V.S.A. § 706c(b).

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

3. That the State Board of Education votes to approve the assignment of the new unified union school district, if approved by the voters, to the WSESU for administrative and other transitional assistance. Assignment would be at least 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.

STATUTORY AUTHORITY: 16 V.S.A. § 706c

BACKGROUND INFORMATION:

I. General

The WSESU consists of four PK-12 districts, with three distinct operating/tuitioning structures:

- The Hartland School District – operates PK-8; tuitions 9-12
- The Weathersfield School District – operates PK-8; tuitions 9-12
- The West Windsor School District – operates PK-6; tuitions 7-12
- The Windsor School District – operates PK-12

After passage of Act 46 in 2015, the four WSESU districts formed a single study committee under 16 V.S.A. § 706. Meeting bi-monthly for 20 months, the Study Committee explored several potential governance options, including some that would have resulted in one or more

districts changing its current operating/tuitioning pattern.[1] The Study Committee solicited comments from the community in a series of public meetings.

The four districts now propose an SU-wide response to Act 46 that they submit pursuant to both 16 V.S.A. §§ 701-724 and Act 46 (2015), Sec. 9. Specifically, the report proposes (1) to merge the Windsor and West Windsor School Districts into a unified union school district that would provide for the education of all resident students, PK-12, by operating one or more schools and (2) to allow both the Hartland and the Weathersfield School Districts to remain as independent town school districts, each of which would continue to operate a school offering PK-8 and pay tuition for students in Grades 9-12.

Although the report discusses the ways in which the four current WSESU districts individually and jointly plan to address the Act 46 goals, ***only the Study Committee's proposal to merge the Windsor and West Windsor Districts into a unified union school district is before the State Board at this time***. Whether the proposal for Hartland and Weathersfield Districts to remain as independent town districts is the best means of creating sustainable educational entities capable of meeting the Act 46 goals is an issue for the State Board to consider when developing the Statewide Plan.

II. "The Windsor/West Windsor Unified Union School District"

The Study Committee proposes creation of a UUSD that would provide for the education of resident students by operating schools offering all grades, PK-12. (New Unified District) beginning on July 1, 2019.

The Study Committee identifies the following school districts as "necessary" to the proposal pursuant to 16 V.S.A. § 706b(b)(1): Windsor; West Windsor.

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

In FY2018, the combined average daily membership (ADM) of the two "necessary" districts was 564.12 (West Windsor – 126; Windsor – 439.12). The combined FY2018 ADM of all four districts in the WSESU was 1,307.14 (Hartland – 430.48; Weathersfield – 311.54).

If the State Board approves the Study Committee's proposal, the electorate of the two districts will vote on March 6, 2018 whether to approve creation of the New Unified District.

The New Unified District, which would provisionally be known as "the Windsor/West Windsor Unified Union School District," would merge two existing PK-12 town school districts – one that currently operates all grades and one that currently operates through Grade 6 and pays tuition for the remaining grades – into a single district responsible for operating schools for all grades, PK-12.

[1] See the Report at pages 50-79 for a discussion of each option.

West Windsor students who are enrolled in Grades 7 through 11 at public expense in the 2018-2019 school year or who are in Grade 6 during that year would have the option to have the New Unified District pay their tuition until they graduate from high school.

The New Unified District would be governed by a school board of six members, with three members allocated to each town. The voters of the entire New Unified District would vote on all members (the "hybrid" model of board membership).

The Articles would require the New Unified District Board to develop policies before July 1, 2020 for offering intradistrict PK-6 choice and to establish structures by July 1, 2019 to support community engagement.

The Articles also would require the Board to "build on existing initiatives" to:

a. Coordinate instructional programs at the elementary level, to maximize student access across the new unified district to the diverse range of instructional programs currently being offered at the Windsor and Albert Bridge elementary schools;
b. Develop and integrate innovative instructional programs that foster comprehensive, placed-based, experiential learning opportunities (PreK-12) designed to make maximum use of the resources – cultural, entrepreneurial, and environmental (e.g., Mount Ascutney and the Connecticut River Valley) – of the surrounding communities.

No school would be closed within the first four years unless approved by the voters of the town in which it is located. In years five and after, the Unified Board could close a school upon an affirmative vote of 2/3 of the full board after at least three public hearings; provided, however, that as "in any other major operational decision by a school board – the approval of a bond, the construction of a new school – the closure of a school [would] be effective only if approved by a majority of the electorate of the new unified district voting at a special vote warned for this purpose."

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

The Town of West Windsor would continue to pay the capital debt service on the West Windsor School District's capital debt assumed by the New Unified District.[2]

The Articles direct the Unified Board to reinvest future operational savings resulting from the gradual elimination of tuition payments in ways that enhance instructional programs, PK-12.

[2] *See* the attached letter from J. Paul Giuliani, Esq. to David Baker, Superintendent, dated December 20, 2017.

The merger vote and election of initial board members would take place by Australian ballot, as required by statute. All later votes on board membership, budgets, and other public questions would also be by Australian ballot.

If created, the New Unified District would not be eligible for tax rate reductions or other transitional assistance, including Small School Grants in the form of perpetual Merger Support Grants.

POLICY IMPLICATIONS:

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

The Report states that the WSESU districts enjoy a strong history of mutual cooperation and planning and that they have "worked to unify … educational programs, particularly at the elementary level to insure a smooth transition to high school for students throughout the SU" by, for example:

- "Working toward a common curriculum, PreK-8 and access to all relevant curricular material."
- "Collective in-service training to support the delivery of the district's core curriculum and ensure uniform implementation of instructional best-practices."
- "District-wide social/emotional program and delivery models."
- "A combined food service contract including district-wide farm-to-school food programs." 1
- "District-wide environmental/nature educational programs/opportunities."
- "Shared business, maintenance, purchasing, and transportation services."
- SU-wide Strategic Plan (2014-2019).

Although the elementary population has declined throughout the SU during the past 14 years, the numbers seem to have stabilized in Windsor. In contrast, the Report states that "declining enrollments at the Albert Bridge School in West Windsor put enormous pressure on that district's capacity to continue to equitably meet the educational needs of its students without prohibitively high levels of education spending."

In addition, while elementary students receiving Free and Reduced-Price Lunch (FRL) has decreased by 8% in Windsor during the last five years, elementary students receiving FRL increased by 11% in West Windsor during that time.

Although the "size of grade level student cohort at the Albert Bridge School in West Windsor does not lend itself to data suitable for comparing student performance," the Report observes the following:

> While it is hard to speculate how things will look three to five years from now, the educational challenge of addressing the particular needs of poorer students is

already persists in our SU as evidenced by the performance gap in SBAC scores between FRL students and Non-FRL students – particularly in Hartland and West Windsor.

In addition, "the overall record of student performance in Hartland and Windsor remains uneven from grade to grade. Only Weathersfield consistently meets or exceeds state standards in both ELA and Math at every grade level." The Report continues:

> When one disaggregates based on economic status, student results for 2017, both the successes and challenges in WSE become clearer. For example:
>
> * * *
>
> - In **Windsor**, Non-FRL in grades 7, 8, and 11 consistently exceed state standards in both English and Math (except grade 11 English results in 2017), while performance results in earlier grades rise steadily for this same economic cohort of students. The challenge is duplicating these results for FRL students. Another bright spot in Windsor is that free and reduced lunch students in grade 11 consistently out-perform their Vermont peers on SAT exams in both reading and math.

Finally, the Report also notes that a "program review of the elementary curriculum at each of the schools in WSE revealed substantial variety, quality, and equality of opportunity comparable to the best schools in Vermont."

EDUCATION IMPLICATIONS:

The proposal anticipates that unification will result in educational benefits, including:

- Projected redirection over 6 years of West Windsor tuition dollars (~$940,000) to support programs and instructional improvements/innovations to benefit the children of Windsor and West Windsor.
- Opportunity for West Windsor 7th and 8th grade students to benefit from Windsor's current Design/Tech Education and Theater programs.
- Increased educational opportunities for all students at Windsor Middle/High School due a larger cohort and more resources.
- Opening up access to after school programs across the schools, made more possible by a larger cohort and the establishment of equitable transportation options.

FISCAL IMPLICATIONS:

The Study Committee identifies potential fiscal benefits including:

- Sharing staff and developing shared programs across both elementary schools.
- Mitigation of West Windsor's increasingly unsustainable rate of annual tax increases through shared staffing, etc.
- Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board

is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction.

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

Overall, 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.

SU GOVERNANCE REQUEST – 16 V.S.A. § 261(d):

Included in the report is a formal request from the current WSESU Board for the State Board to adjust representation on the SU Board if the unified district is created. Currently, each of the four school district boards appoints three members to the WSESU Board pursuant to 16 V.S.A. § 266. If created, a unified union school district would be eligible to appoint three members. Under this scenario, the appointed members on the SU Board from West Windsor and Windsor would decrease from a total of six to a total of three. Pursuant to 16 V.S.A. § 261(d), the current SU Board asks the State Board to authorize the new unified union school district to appoint three members from each town for a total of six representatives. Although the State Board has granted other § 261(d) requests in connection with merger activity around the State, the Board has generally waited until after the unification vote to do so.

The Agency considers the WSESU's request to be reasonable, but believes that it would be prudent for the Board to act on this request after the voters have approved the unification proposal and after the State Board has a better sense of what, if any, SU boundary changes it may make in the region.

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Item T

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
Windsor Southeast	West Windsor School District	X	
	Windsor School District	X	

Type of Merger	
Please refer to the related eligibility worksheets to determine baseline eligibility for each merger type.	**(column reserved for agency use)**
☐ ~~**Accelerated Merger** (Act 46, Section 6)~~	
A Regional Education District (RED) or one of its variations (Act 153 (2010) and Act 156 (2012)) ☐ **RED** (Act 153, Secs. 2-3, as amended by Act 156 , Sec. 1 and Act 46, Sec. 16) ☐ **Side by Side Merger** (Act 156 , Sec. 15) Districts involved in the related merger: ☐ **Layered Merger (Union Elementary School District)** (Act 156, Sec. 16) ☐ **Modified Unified Union School District (MUUSD)** (Act 156, Sec. 17, as amended by Act 56 (2013), Sec. 3)	
☐ **Conventional Merger – merger into a preferred structure after deadline for an Accelerated Merger** (Act 46, Section 7) ☒ Voluntary/Non-Incentivized Merger that is part of a proposal for an Alternative Governance Structure	

Dates, ADM, and Name	
Date on which the proposal will be submitted to the voters of each district (16 V.S.A. § 706b(b)(11)): **March 6, 2018**	
Date on which the new district, if approved, will begin operating (16 V.S.A. § 706b(b)(12)): **July 1, 2019**	
Combined ADM of all "necessary" districts in the current fiscal year: 573.07	

Proposed name of new district: Provisional Name – Windsor/West Windsor Unified Union School District	

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

The Proposed School District is in the Best Interest of the State, Students, and School Districts – as required by 16 V.S.A. § 706c		
<u>Goal #1</u>: The proposed union school district will provide substantial equity in the quality and variety of educational opportunities. *Act 46, Sec. 2(1)*	✓ The opportunity for West Windsor 7th and 8th grade students to benefit from Windsor's current Design/Tech Education and Theater programs. ✓ Increased educational opportunity at Windsor Middle/High School due a larger cohort of students. ✓ Geographic proximity of districts allows for sharing staff and developing shared programs across both elementary schools. ✓ Opening up access to after school programs across the schools, particularly when there are not enough students to host a particular activity – e.g. shared drama programs, athletic teams, musical groups. This would also entail working together to establish equitable transportation solutions that would enable students to access these shared opportunities.	
<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	✓ The projected redirection over 6 years of West Windsor tuition dollars, ~$940,000 currently going to other districts can be used at home in support program and instructional improvements/innovations directly benefitting the children of Windsor <u>and</u> West Windsor.	

Board of Education at the direction of the General Assembly. *Act 46, Sec. 2(2)*	✓ At the SU level, annual reviews of student performance, PreK-12, enabled by a single process for reporting the academic performance of high school students, planned and initiated through the superintendent's office in order to: o Provide transparent data on student growth and achievement after grade 8. o Develop strategies and programs for better preparing Windsor Southeast students to matriculate into high school. o Provide parents with a more transparent and fair assessment of the overall quality of the education students receive at a particular high school. ✓ At the SU level, annual reviews of program offerings and program effectiveness across all the schools in the district as a prelude to the budgeting process to assess the equity of access to quality instruction both in school and after school. ✓ The new unified board shall in conjunction with the supervisory union board, support curriculum and instructional planning to build on existing initiatives to: a. Coordinate instructional programs at the elementary level, to maximize student access across the new unified district to the diverse range of instructional programs currently being offered at the Windsor and Albert Bridge elementary schools; b. Develop and integrate innovative instructional programs that foster comprehensive, placed-based, experiential learning opportunities (PreK-12) designed to make maximum use of the resources – cultural, entrepreneurial, and environmental (e.g., Mount Ascutney and the Connecticut River Valley) – of the surrounding communities.	

Goal #3: 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. *Act 46, Sec. 2(3)*	✓ New operational opportunities in a merged district to mitigate West Windsor's increasingly unsustainable rate of annual tax increases in support of its elementary school programs through shared staffing, etc. ✓ Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction. ✓ Given the geographic proximity of the Windsor and West Windsor elementary schools, a commitment by both communities to maintain a school in West Windsor. ✓ At the SU level, creating a unified budgeting process that could better maximize efficiencies and coordinate the sharing of non-financial resources like teacher leadership, teacher planning teams, performance data assessment, curriculum planning and development, school-community partnerships, grant procurement, facilities, musical instrument programs, and so on. It would allow for more centralized bulk purchasing that could be "billed back" to individual districts within the budget lines set by their local budgets. ✓ The coordination and implementation of uniform best practices in personal learning plans, proficiency based learning strategies, proficiency based report cards, and flexible pathways (Act 77). ✓ The coordination of professional development activities across the SU in support of local and WSE initiatives. ✓ District leadership through a more uniform/inclusive hiring process at all levels. ✓ Building SU leadership through a clearly defined process of setting short and long-term goals of for educational/instructional improvement, as well as reporting mechanisms and SU-wide sharing of district initiatives and progress.	
	✓ The union's annual evaluation of performance data, program offerings, program effectiveness, and core instructional strategies with the goal of setting and/or revising SU goals and implementation plans.	

Goal #4: The proposed union school district will promote transparency and accountability. *Act 46, Sec. 2(4)*	✓ A unified budget process by coordinating line items and billed backs to individual schools on shared services and contracts ✓ Community engagement through a fully warned calendar of SU meeting to address the strategic, education, and operational needs of the SU, as well as the creation of new opportunities for communities to come together to celebrate student achievement and build a greater sense of regional identity.	
Goal #5: The proposed union school district will deliver education at a cost that parents, voters, and taxpayers value. *Act 46, Sec. 2(5)*	✓ Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction. ✓ The creation of additional, fully-warned Supervisory Union meeting to address the strategic, educational, and operational needs of the entire SU where stakeholders across the district would have input on the development of educational policy and programming. *While at the same time maintaining*, ✓ Local board meetings where principals and teachers can report to their local boards and parents, students, and citizens can engage in strategic discussions about the progress and needs of their students – ensuring that a local perspective informs district-wide decision-making.	
Regional Effects: 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? *Act 46, Section 8(a)(2)*	This proposed merger leaves no other district geographically isolated; It reduces the number of school boards in Windsor Southeast and fosters greater cooperation between the communities of West Windsor and Windsor.	

Articles of Agreement – as required by 16 V.S.A. § 706b(b)(3) - (10), (13)		
(3) The grades to be operated by the proposed union school district The grades, if any, for which the proposed union school district shall pay tuition	**PreK-12 Operational District** ***Note: A positive vote on the part of the electorate of Windsor and West Windsor would result in a single unified union PreK-12 operating district where West Windsor voluntarily changes its current operating structure as a PreK-6 operating district with school choice 7-12.***	
(4) The cost and general location of any proposed new schools to be constructed The cost and general description of any proposed renovations	**No new construction proposed at this time.**	

(5) A plan for the first year of the proposed union school district's operation for: (A) the transportation of students (B) the assignment of staff (C) curriculum 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)	The Windsor/West Windsor Unified Union School District will provide for the transportation of students, assignment of staff, and curriculum that is consistent with the *practices*/contracts, collective bargaining agreements, and provisions of law that are in effect during the first year that the new Unified Union District is providing full educational services and operations. The board will comply with the 16 VSA Chapter 53, subchapter 3, regarding recognition of the representatives of employees of the respective forming districts as the representatives of the employees of the union school district and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees. In the absence of new collective bargaining agreements on July 1, 2019, the Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, subchapter 3. The Board shall honor all individual employment contracts that are in place in the forming districts on June 30, 2019 until their respective termination dates.	

(6) The indebtedness of the proposed merging districts that the proposed union school district shall assume.

The Windsor/West Windsor Unified Union School District shall assume all capital debt as may exist on June 30, 2019, including both principal and interest, of the forming school districts that joined the new union district.

However, debt service on capital debt of the West Windsor Town School to be assumed by the Windsor/West Windsor Unified Union School District shall continue to be paid by the Town of West Windsor in the manner provided in the March 4, 2003 vote of the West Windsor Town School District.

Statement of Long-Term Debt												
District	**Amount Outstanding 03/29/17**	**Annual Principal Payment**	**Pay off Date**	**Estimate 07/01/18 Balance**								
West Windsor	**595,000**	**80,000**	**11/15/25**	**515,000**								

(7) The specific pieces of real property owned by the proposed merging districts that the proposed union school district shall acquire, including:

* their valuation
* how the proposed union school district shall pay for them

Note: The following table contains a statement of Values for all the real property of the districts that make up the Windsor Southeast Supervisory Union:

Windsor Southeast Supervisory Union Statement of Values												
Description	**Address**	**City**	**Bldg Values**	**Business & Personel**	**Insurable Site Improv**	**Computer Equip**	**Books & Valuable Papers**	**Mobile Equip**	**Auto**	**BI / EE***	**Grand Total**	***BI/EE Business interuption insurance**
Office	**105 Main Street Suite 200**	**Windsor Southeast SU**	**0**	**26,523**		**35,000**	**0**	**0**	**0**	**1,000,000**	**1,061,523**	
Albert Bridge	**108 Hartland Brownsville Rd**	**West Windsor**	**2,925,700**	**163,568**	**32,700**	**84,000**	**0**	**1,500**	**0**	**0**	**3,207,468**	
Hartland Elem	**97 Martinsville Road**	**Hartland**	**6,912,900**	**673,142**	**89,600**	**300,000**	**0**	**3,800**	**0**	**0**	**7,979,442**	
Hartland Elem	**98 Martinsville Road**	**Hartland**	**25,000**	**15,914**		**0**	**0**	**0**	**0**	**0**	**40,914**	
Hartland Elem	**99 Martinsville Road**	**Hartland**	**38,000**	**37,132**		**0**	**0**	**0**	**0**	**0**	**75,132**	**8,095,488**
Wthrsfld School	**135 Schoolhouse Road**	**Weathersfield**	**9,372,200**	**419,000**	**31,400**	**205,000**	**0**	**1,000**	**0**	**0**	**10,028,600**	
Out Bldg. 1	**136 Schoolhouse Road**	**Weathersfield**	**2,500**	**1,591**		**0**	**0**	**0**	**0**	**0**	**4,091**	**10,032,691**
Windsor High School / State Street School	**19 Ascutney St. / 127 State St.**	**Windsor**	**20,923,000**	**1,355,362**	**353,738**	**890,000**	**0**	**100,000**	**0**	**0**	**23,622,100**	
Field Bldg 1	**20 Ascutney St. / 127 State St.**	**Windsor**	**5,000**	**42,436**		**0**	**0**	**0**	**0**	**0**	**47,436**	
Field Bldg 2	**21 Ascutney St. / 127 State St.**	**Windsor**	**5,000**	**5,305**		**0**	**0**	**0**	**0**	**0**	**10,305**	
Field Bldg 3	**22 Ascutney St. / 127 State St.**	**Windsor**	**5,000**	**13,261**		**0**	**0**	**0**	**0**	**0**	**18,261**	**23,698,102**
			40,214,300	**2,753,234**		**1,514,000**	**0**	**106,300**	**0**	**1,000,000**	**46,095,272**	

(8) *[repealed 2004 Acts and Resolves No. 130, Sec. 15]*	
(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 * no more than 18 members total * each member town is entitled to at least one representative	**Article 8. Board of School Directors Representation** A forming town district's representation on the Union School District Board of School Directors will be determined as an at-large "hybrid model". Membership on the Windsor/West Windsor Union School District Board is apportioned to each town. Apportionment does not have to be proportional to the town's population. Voters in member towns vote on the same slate of candidates. The ballot is categorized to represent each town's apportioned seats on the Union School District Board of School Directors and the candidates running for those positions. At no time will a town/village corresponding to a pre-existing member school district have less than one board member with a single vote of one on the board of school directors. The initial membership on the six (6) member Union School District Board of School Directors will be as follows: **Windsor:** 3 members **West Windsor:** 3 Members

* *see also* 16 V.S.A. § 706k(c): one or more at-large directors * *see also* 16 V.S.A. § 707(c): weighted voting	
(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	**Article 9: Initial Directors Terms of Office** School Directors will be elected by Australian ballot for three year terms, except for those initially elected at the time of the formation of the new Windsor/West Windsor Unified Union District. In the initial election of School Directors, the terms of office will be as follows: **Term Ending March 2020** / **Term Ending March 2021** / **Term ending March 2022** **West Windsor** 1 / 1 / 1 **Windsor** 1 / 1 / 1 The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting in 2019. Nominations for the office of Windsor/West Windsor Unified Union School Director representing a specific town shall be made by filing, with the clerk of that town proposed as a member of the Unified District, a statement of nomination signed by at least 30 voters in that town or one percent of the legal voters in the town, whichever is less, and accepted in writing by the nominee. A statement shall be filed not fewer than 30, nor more than 40 days prior to the date of the vote. Pursuant to the provisions of 16 V.S.A. – 706j(b), directors initially elected to the new district shall be sworn in and assume the duties of their office.

	Thereafter, members of the Board of School Directors will be elected by Australian ballot at the unified school district's Annual Meeting. Terms of office shall begin and expire on the date of the school district's annual meeting. In the event the district's annual meeting precedes Town Meeting Day, the Director's terms shall expire on Town Meeting Day.	
(13) Any other matters that the study committee considers pertinent, including whether votes on the union school district budget or public questions shall be by Australian ballot ***(please list each matter separately)***	**Article 12. Australian Ballot Voting** The Windsor/West Windsor Unified Union School District shall elect its officers, vote the annual school district budget, and decide public questions by Australian ballot. In Australian ballot voting, the ballots shall be commingled. **Article 13. Provision for Closure of a School** The New Unified Union District Board may not close any school conveyed to the unified union school district by a Forming District within the first four (4) years of operation of the New Unified Union District without the consent of the electorate of that town. After four (4) years of operation, the New Unified Union District may close a school conveyed to the New Unified Union District by a Forming District upon an affirmative vote of 2/3 of the full board of the New Unified Union Board of Directors. Prior to holding a vote on whether to close a school, the Board shall hold at least three public hearings regarding the proposed school closure. At least one of the public hearings shall be held in the community in which the school is located. If after conducting public hearings, the Board of Directors intends to vote on whether to close a school, it shall give public notice of its intent to hold a vote on whether to close a school, stating the reason for the closure, at least 30 days prior to the vote. Among the triggers for initiating a discussion, the new unified board should pay particular attention to educational quality and the viability/sustainability of the district's existing schools. As in any other major operational decision by a school board – the approval of a bond, the construction of a new school - the closure of a school shall be effective only if approved by a majority of the electorate of the new unified district voting at a special vote warned for this purpose. **Article 14. Intra-District Elementary School Choice** Before July 1, 2020, the Board of School Directors shall develop policies for offering intra-district choice (PreK-6) to the families or guardians of students matriculating in grades for which the Unified District operates multiple buildings as soon as practicable.	

Policies respecting choice shall consider issues including, but not limited to, transportation, socio-economic equity, proximity to the selected building, unity of siblings, and the capacities of receiving schools and sending schools.

Article 15. Community Input Policies

The new unified board shall ensure ongoing opportunities for local input on policy and budget development. Structures to support and encourage public participation within the Windsor/West Windsor Unified Union School District will be established by the Board on or before July 1, 2019.

Article 16. Curriculum Development/Place Based Learning/Mountain Curriculum

The new unified board shall in conjunction with the supervisory union board, support curriculum and instructional planning to build on existing initiatives to:

c. Coordinate instructional programs at the elementary level, to maximize student access across the new unified district to the diverse range of instructional programs currently being offered at the Windsor and Albert Bridge elementary schools;
d. Develop and integrate innovative instructional programs that foster comprehensive, placed-based, experiential learning opportunities (PreK-12) designed to make maximum use of the resources – cultural, entrepreneurial, and environmental (e.g., Mount Ascutney and the Connecticut River Valley) – of the surrounding communities.

Article 17. Tuition Savings and Program Development

Given the expressed desire of voters to strengthen the new unified district's instructional programs (PreK-12) through their vote to unify their two school districts, the Windsor/West Windsor unified union Board of School Directors is charged to re-invest, for the purposes of program and instructional enhancement, future operational savings due to the reduction of budgeted tuition expenses as grand-fathered West Windsor tuition students graduate from high school over the next six years.

Article 18. Renaming the New District

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

Windsor Southeast
Joint 706 Study Committee on District Unification

Proposal for West Windsor/Windsor Merger and Alternative Governance Structure for WSE

December 14, 2017

COMMITTEE MEMBERS

Hartland:
Bettina Read – Board Chair
Laura Bergstresser
Stacey Bradley
Sarah Stewart Taylor

Weathersfield:
Sean Whalen – Board Chair
Anthony French
Deborah Gurney
Patty Kelly

West Windsor:
Elizabeth Burrows – Board Chair
Pat Eastman
David Hill
David Jaacks

Windsor:
Amy McMullen – Board Chair
David Morin
John Tansey
Win Townsend

David Baker – Superintendent
Peter Clarke – Act 46 Coordinator

EXECUTIVE SUMMARY

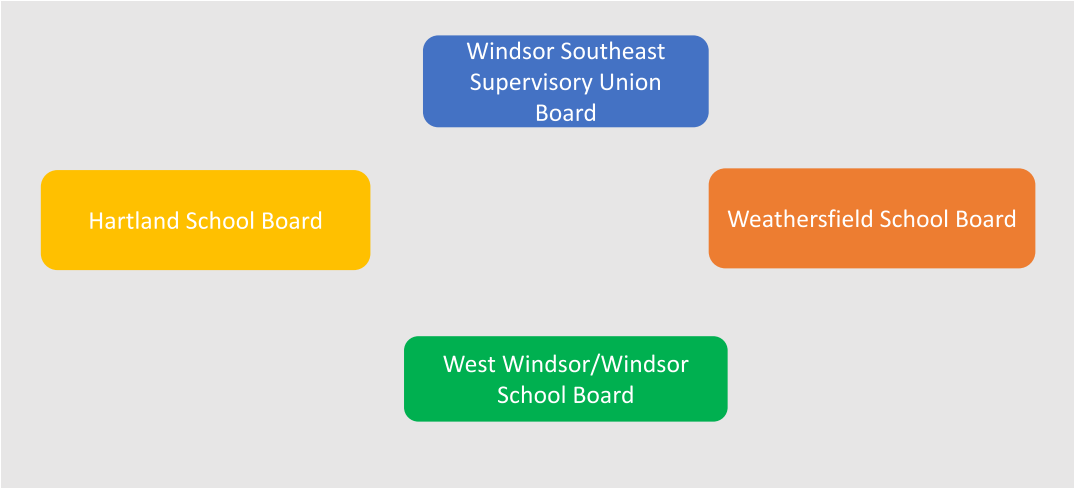
Proposed Alternative Structure

After a thorough review of all of the relevant demographic, fiscal, educational, and operational data, Members of the Act 46 706 Committee, along with the school boards that represent the citizens of the communities in our SU, believe that there is clear evidence for the State Board to conclude that:

1. **A merger of the Windsor and West Windsor school districts into a single unified union PreK-12 school, while**
2. **Maintaining the current governance structures of Hartland and Weathersfield as autonomous PreK-8 operating districts within the context of Windsor Southeast's existing supervisory union,**

is the "best means" for achieving the goals of Act 46 in our region.

Windsor Southeast - Proposed Alternative Governance Structure



The Study Committee sought to identify a sustainable governance structure that not only met the goals of Act 46, but one that could specifically address the educational needs and personal aspirations of every student in our care, a structure that would ensure skilled, confident, creative, and compassionate graduates ready to take their place in the world.

Best Means

Specifically, the committee examined four (4) **Preferred Patterns of School Governance** for Windsor Southeast under Act 46.

A. Creating a **Unified Union School District** governed by a single board of school directors representing of the communities of Hartland, Weathersfield, West Windsor, and Windsor. The Unified Union School District would be responsible for the PreK-12 education of all students in the new district. This kind of merger, however, can only be achieved if each of the tuition operating districts in the current supervisory union vote to give up choice and merge into a single PreK-12 school district.

B. Creating a new **2x2 Regional Education District** or (R.E.D) would result in a supervisory union made up of two unified union school districts. In a side-by-side, one new district must result from the union of two or more like districts, and must be a PreK-12 operating district. The other side must result from the union of two or more tuition operating districts with the same operating configuration. The current side-by side configuration under study would result in the unification of West Windsor and Windsor to form the PreK-12 unified union and the other side would result from the unification of Hartland and Weathersfield as PreK-8 operating districts which continue to offer high school choice. To legally, achieve this structure, however, the citizens of West Windsor would have to agree to give up choice for their students (7-12) and create a single operating district PreK-12 with Windsor.

C. Creating a **3x1 Regional Educational District or** (R.E.D) could result from the union of one PreK-12 operating district (Windsor) and three unified, similarly configured tuition operating districts:

   Version 1: Hartland, Weathersfield, and West Windsor form a Prek-8 operating district with high school choice where West Windsor votes to give up choice for its 7th and 8th graders.

   Version 2: Hartland, Weathersfield, and West Windsor form a Prek-6 unified tuition district (PreK-6) where Hartland and Weathersfield extend school choice to their 7th and 8th graders and become Prek-6 elementary schools.

In addition, the Committee explored, three (3) potential **Alternative Structures**:

A. **Maintaining Windsor Southeast's existing supervisory union** operating structure (without tax incentives) of four independent, but cooperative local school boards with one supervisory union board with an enhanced strategic capacity for addressing district-wide educational and policy issues.
B. **Maintaining Windsor Southeast's existing supervisory union, but with the fewest school boards practicable.** This would entail a merger of the Hartland and Weathersfield school boards into a single unified union board governing both schools. All other local governance structures within the current supervisory union would remain, but the supervisory union board would be given an enhanced strategic capacity on district-wide educational/policy issues. *Note: Given the differing operating structures of Windsor and West Windsor, no unification of those districts is possible within Windsor Southeast without a vote of the electorate to change their current operating structure to match one or more of the other districts in the region.*
C. **Proposing a merger of the Windsor and West Windsor school districts** into a single unified union PreK-12 school district while maintaining the current governance structures of Hartland and

Weathersfield as autonomous PreK-8 operating districts within the context of their existing supervisory union and governed by an SU board with an enhanced strategic capacity for addressing district-wide educational and policy issues.

In evaluating each of these seven (7) options, the Committee identified significant merger obstacles in every potential alternative structure save Alternative Option C outlined above. This report provides clear evidence for the State Board to conclude that the Committee's Proposed Alternative Structure for maintaining a supervisory union structure in WSE, in conjunction with a proposed unification of the West Windsor and Windsor school districts, is the best means for achieving the goals of Act 46 in our region.

Summary Findings – Unification of West Windsor and Windsor School Districts

The committee found real educational, operational, and financial opportunities that would powerfully benefit the students in both communities in a merger between the Windsor and West Windsor school districts *(See Above).*

Among those benefits are:

- ✓ The projected redirection over 6 years of West Windsor tuition dollars, ~$940,000 currently going to other districts that can be used at home in support program and instructional improvements/innovations directly benefitting the children of Windsor and West Windsor.

- ✓ The opportunity for West Windsor 7th and 8th grade students to benefit from Windsor's current Design/Tech Education and Theater programs.

- ✓ Increased educational opportunity at Windsor Middle/High School due a larger cohort of students.

- ✓ New operational opportunities in a merged district to mitigate West Windsor's increasingly unsustainable rate of annual tax increases in support of its elementary school programs through shared staffing, etc.

- ✓ Given the geographic proximity of the Windsor and West Windsor elementary schools, a commitment by both communities to maintain a school in West Windsor.

- ✓ Equal representation and decision-making authority for both communities on a new unified school board.

- ✓ Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction.

Given these clear and substantive benefits, the Committee considers this merger, along with the strategic and operational recommendations for the management of our supervisory union, to be the cornerstone of our Committee's proposal for an Alternative Structure in Windsor Southeast.

Summary Arguments – "Best Means"

We argue that a supervisory union structure can, when effectively implemented in the right context (particularly between districts with a shared strategic vision and history of operational cooperation), provide (and has provided!) students and communities with excellent educational programs.

The current WSE supervisory union structure has already enabled our districts to develop a comprehensive vision of our shared future while allowing each district to work individually, but in concert to realize our collective future. Such an approach encourages and supports one district to develop innovative programs and work out policies that can be scaled to the whole supervisory union for the benefit of all.

Meeting the Goals of Act 46 – A Plan for Continuous Improvement

In addition, the Committee's report details an articulated plan for continuous improvement that addresses the demographic, educational, operational, and financial challenges facing the schools in our region. This ensures that our students receive an education that meets their needs as people and also ensures that they acquire the knowledge and skills to meet or exceed state and national standards.

In considering the educational, operational and fiscal requirements for Alternative Plans, Windsor Southeast points to a strong history of mutual cooperation and planning that has routinely taken place through the district's supervisory union board structure. While each district board serves a different continuum of students PreK-12, Windsor Southeast has worked to unify its educational programs, particularly at the elementary level to insure a smooth transition into high school for students across the supervisory union. To that end, the district has policies and procedures in place across the supervisory union that have created and continue to deliver ongoing support for:

a. Strong unified governance at the Supervisory Union level – three members of each local district board sit on the Supervisory Union board ensuring clear communication and policy-making authority;
b. Working toward a common curriculum, PreK-8 and access to all relevant curricular material;
c. Collective in-service training to support the delivery of the district's core curriculum and ensure uniform implementation of instructional best-practices;
d. District-wide social/emotional program and delivery models (including collaborative problem solving through PBIS and MTSS)
e. Special Education including moving to a "billing" approach based on equalized pupil counts rather than actual use, sheltering small districts in the SU from major fluctuations in special education populations.
f. A combined food service contract including district-wide farm to school food programs;
g. Shared tech support and data access provided by central office;
h. A shared server providing internet access and a supervisory union web presence and design;
i. A unified collective bargaining agreement that covers all issues except issues related to work during the school day (teacher prep and planning time still not equitable and in the process of being negotiated);
j. A district-wide program of mentoring and teacher orientation;
k. A unified teacher evaluation system;
l. Universal Pre-School;
m. District-wide environmental/nature educational programs/opportunities.
n. Shared business, maintenance, purchasing, and transportation services.
o. District-wide Wellness Team (students and teachers)

Finally, all the districts that make the Windsor Southeast Supervisory Union worked together to create a **Strategic Plan (2014-2019)** *(See Appendix F)* for the entire supervisory union. This effort was supported by

individual district/building plans to complement and support district-wide initiatives. These plans are at once comprehensive and transparent, and deal with the myriad challenges facing the current SU – evolving student needs, curriculum development, teacher support, instructional development, facility and capital needs, special education, operational effectiveness, etc.

The core educational and operation strategies/goals identified in 2014 included:

- Strategy 1 – Vision for Leading the Focus on Climate, Teaching and Learning
- Strategy 2 – Ensuring Equity and Adequacy of Fiscal and Human Resources
- Strategy 3 – Engaging Families and the Community
- Strategy 4 – Ensuring Accountability for Results

Looking ahead, the districts that make up WSE, both individually and collectively commit themselves to

1. ***Maximizing, within the context of existing law, the role that the current supervisory union board strategically plays in setting, implementing, and assessing district policy and educational operations.***

This would be achieved by

A. Exploring a Supervisory Union Board Structure where all members of local district boards are also members of the SU board. This would eliminate redundancy in representation and allow district matters to be fully vetted and decided up without multiple meetings and policy discussions.

Or

B. Having all local board members attend SU meetings, keeping local representation as it is. Votes on SU business would proceed according to current representational structure.

In terms of **educational planning**, this would mean:

- Local educational initiatives would be presented and vetted at an SU level – this would strike the appropriate balance between each local school having the freedom to innovate and explore new instructional/student support programs. I would also ensure transparency and a district-wide capacity to assess the effectiveness of each initiative and strategically decide which innovations are most promising before rolling them out across the entire SU

- A common approach would be used to assess student performance and address the particular needs of students and schools. Working collaboratively would also create district-wide transparency over issues of student performance, instructional opportunity, and teacher support, enabling local citizens to better assess the budgetary recommendations of their local board. It would also encourage parents, citizens, and taxpayers to view their local school from a regional perspective.

In addition, since not every school in the SU has the same profile of needs and/or challenges, vetting budgets through a district-wide process would create more awareness of any differences in staffing and program needs throughout the district. It could also bring to the surface when and where necessary, any inequitable differences in program opportunities.

This approach could also create a new transparent forum for local boards to vet and when necessary justify their budgetary priorities against the strategic goals approved for the entire union.

In terms of **strengthening student performance and ensuring equality of educational opportunity**, this would mean:

I. Annual reviews of student performance, PreK-12 enabled by a single process for reporting the academic performance of high school students, planned and initiated through the superintendent's office, in order to:

   a. Provide transparent data on student growth and achievement after grade 8.
   b. Develop strategies and programs for better preparing Windsor Southeast students to matriculate into high school.
   c. Provide parents with a more transparent and fair assessment of the overall quality of the education students receive at a particular high school;

II. Annual reviews of program offerings and program effectiveness across all the schools in the district as a prelude to the budgeting process, to assess equity of access to quality instruction both in school and after school.

III. Open access to after school programs across all schools, particularly when there are not enough students to host a particular activity – e.g. shared drama programs, athletic teams, musical groups. This would also entail working together to establish equitable transportation solutions that would enable students to access these shared opportunities.

IV. Coordinating some district-wide celebrations of student performance; creating showcase opportunities for the district's best musicians, singers, and athletes to come together to share their talents and work/compete with one another.

In terms of **building and district leadership**, this would mean:

- Creating a district-wide hiring process where the entire administrative team from Superintendent to building principal, were recruited, vetted, and hired by a collaborative process involving key stake-holders across the SU, particularly the superintendent. Local building contracts would still apply but the process would aim to find not simply a leader for a specific school, but ensure a hire who can be an integral member of a district-wide collaborative leadership team.

Operationally, this would mean:

- Creating a unified budgeting process that could better maximize efficiencies and coordinate the sharing of non-financial resources like teacher leadership, teacher planning teams, performance data assessment, curriculum planning and development, school-community partnerships, grant procurement, facilities, musical instrument programs, etc. It would allow for more centralized bulk purchasing that could be "billed back" to individual districts within the budget lines set by their local budgets.

In terms of **school identity and community involvement**, this would mean:

- The creation of additional, fully-warned Supervisory Union meeting to address the strategic, educational, and operational needs of the entire SU where stakeholders across the district would have input on the development of educational policy and programming.

While at the same time maintaining,

Local board meetings where principals and teachers can report to their local boards and parents, students, and citizens can engage in strategic discussions about the progress and needs of their students – ensuring that a local perspective informs district-wide decision-making.

With this strategic relationship at the heart of our supervisory union governance structure, WSE commits itself, among the recommendations already made throughout this self-study, to maintain and or strengthen:

- The SU's annual evaluation of performance data, program offerings, program effectiveness, and core instructional strategies with the goal of setting and/or revising SU goals and implementation plans.
- The coordination and implementation of uniform best practices in personal learning plans, proficiency-based learning strategies, proficiency-based report cards, and flexible pathways (Act 77).
- The coordination of professional development activities across the SU in support of local and WSE initiatives.
- District leadership through a more uniform/inclusive hiring process at all levels
- Building and SU leadership through a clearly-defined process of setting short and long-term goals of for educational/instructional improvement, as well as reporting mechanisms and SU wide sharing of district initiatives and progress.
- A unified budget process by coordinating line items and billed backs to individual schools on shared services and contracts
- Community engagement through a fully-warned calendar of SU meeting to address strategic, education, and operational needs of SU, as well as the creation of new opportunities for communities to come together to celebrate student achievement and build a greater sense of regional identity.

Proposal for an Alternative Structure - Summary Arguments:

Over the past 20 months, the work we have done together has opened up new lines of strategic communication and mutual understanding. We believe it is in the best interest of our students to build upon both established and emerging patterns of district-wide cooperation and trust. Through that, it has resulted in a dynamic vision of continuous improvement for all our schools. At the same time, we believe our existing SU structure will maintain the requisite autonomy required to respond quickly and responsibly to the unique matrix of education need exhibited in each of our communities.

Supervisory union structures can work – and are working here in Windsor Southeast. This is evidenced by the performance and operational data at the heart of this report. The proposed merger of Windsor and West Windsor. It is specifically designed to address the demographic and fiscal trends facing the community of West Windsor in order to insure sustainable/cost effective educational programs of the highest quality for every student served in our SU.

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WINDSOR SOUTHEAST: PROPOSAL FOR AN ALTERNATIVE STRUCTURE

INTRODUCTION:

Process:

Act 46 is a far-reaching piece of legislation designed to encourage individual districts, like the ones that make up the Windsor Southeast Supervisory Union, to explore the potential benefits of unifying their existing governance structures. It is a bill whose central goal is to improve the educational quality of our schools and to achieve that goal at an affordable and sustainable cost that taxpayers will value.

On September 2, 2015, the school boards of Hartland, Weathersfield, West Windsor, and Windsor voted to form a 706b Study Committee to review and assess existing patterns of governance within the Windsor Southeast Supervisory Union given the new requirements of Act 46. The law encourages districts to explore certain preferred models of governance; these structures are awarded tax incentives under the law. However, Windsor Southeast Supervisory Union is made up of districts with conflicting patterns of school governance, making unification difficult to achieve under existing law:

Hartland and **Weathersfield** are PreK-8 operating districts that offer high school choice to students in grades 9-12.
West Windsor is a PreK-6 operating district that offers middle school/high school choice to students in grades 7-12.
Windsor is a PreK-12 operating districts that does not tuition its students.

Since districts with differing operating configurations cannot unify into a single unified district that offers different educational choices to different students in the same district, the question of remaining a Choice/Tuition district has been front and center to the deliberations before the committee. Under current law, the State of Vermont cannot compel a local school district to abandon choice in favor of a different governance structure. However, the Committee has undertaken a full exploration of all governance alternatives available to them to assess their potential educational, financial, and operational benefits prior to recommending a path forward to its citizens.

To facilitate the study, the committee secured a consultant, Mr. Peter A. Clarke, from the *Act 46 Project*, a joint initiative of the Vermont School Boards Association, Vermont Superintendents Association, and Vermont School Board's Insurance Trust.

Over the past 20 months, the committee met bi-monthly in open session. The committee has attempted to maintain a transparent record of its work through ongoing postings to the SU's website of its meeting schedule, minutes, working documents, and draft findings. In addition, the committee held multiple public forums in every community across the current SU on a variety of issues related to district unification to elicit comment on its findings.

The 706 Committee submitted its final proposal for the merger of West Windsor and Windsor school districts to the boards of Windsor and West Windsor for review and comment, and formally approved its final report/recommendation for that merger. The Proposal for an Alternative Structure for the entire WSE embedded within this report was also approved by the 706 Committee and submitted to all of the district boards in Windsor Southeast for review, comment, and formal approval.

In addition, the committee's proposal for an alternative structure for Windsor Southeast contains a request for a change/waiver in/of the current representational structure of the WSE supervisory union board, should the state

approve this proposed alternative structure and the Windsor/West Windsor merger is approved by its voters. This request for a change in SU structure under Title 16, Chapter 007; section 261, was approved by the Windsor Southeast Supervisory Union board and a letter to the State Board to that effect is included in the final report.

Focus of Deliberations:

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

- *To provide substantive equity in the quality and variety of educational opportunities statewide.*
- *To lead students to achieve or exceed the State's Educational Quality Standards.*
- *To maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with the goal of increasing the district-level ratio of students to full-time equivalent staff*
- *To promote transparency and accountability.*
- *To achieve these goals at a cost that parents, voters, and taxpayers value.*

Central to the committee's deliberations concerning any potential plan to reorganize current patterns of school governance within Windsor Southeast, the committee focused on one central overriding question:

How would a new governance structure benefit our children? Specifically, how would any new, governance structure (unified or alternative) provide better, more equitable learning opportunities for our children and better support them to achieve or exceed the State's Educational Quality Standards?

Potential Governance Structures for Windsor Southeast:

Introduction:

Act 46 requires school districts to find possible regional merging partners, but districts may only merge with other districts with identical governance structures. From the outset, we were challenged by a lack of interested merging partners with identical configurations to our schools. To the north of WSESU is the Hartford School District (K-12) which is exempt from Act 46 because of its size. North of Hartford is Norwich (K-6), which has been declared exempt by the AOE because of its membership in an interstate school district. To the west is the Woodstock Unified District (as of 2017, K-12), which indicated it was not interested in discussing a merger with WSESU. To the south is the Springfield School District (K-12) which is also exempt from Act 46 because of its size. To the east is the Connecticut River.

The closest K-8 district is Tunbridge, which is 40 miles from Hartland and 50 miles from Weathersfield.

As a result, WSE's study committee was forced to look within the SU's existing boundaries at governance options that might meet the goals of Act 46.

Specifically, the committee examined 4 potential patterns of school governance within Windsor Southeast:

I. Preferred Structures Under the Law:

Under current law, the committee examined 3 potential merger scenarios that as preferred structures, received tax incentives:

- Creating a **Unified Union School District,** governed by a single board of school directors representing of the communities of Hartland, Weathersfield, West Windsor, and Windsor responsible for the PreK-12 education of all students in the new district. This kind of merger, however, can only be achieved if each of the tuition operating districts in the current supervisory union vote to give up choice and merge into a single PreK-12 school district.

- Creating a new **2x2 Regional Education District** or (R.E.D) would result in a supervisory union made up of two unified union school districts. In a side-by-side, one new district must result from the union of two or more like districts, and must be a PreK-12 operating district. The other side must result from the union of two or more tuition operating districts with the same operating configuration. The current side-by-side configuration under study would result in the unification of West Windsor and Windsor to form the PreK-12 unified union and the other side would result from the unification of Hartland and Weathersfield as PreK-8 operating districts which continue to offer high school choice. To legally achieve this structure, however, the citizens of West Windsor would have to agree to give up choice for their students (7-12) and create a single operating district PreK-12 with Windsor.

- Creating a **3x1 Regional Educational District or** (R.E.D) could result from the union of one PreK-12 operating district (Windsor) and three unified, similarly configured tuition operating districts:

  Version 1: Hartland, Weathersfield, and West Windsor form a Prek-8 operating district with high school choice where West Windsor votes to give up choice for its 7th and 8th graders.

  Version 2: Hartland, Weathersfield, and West Windsor form a Prek-6 unified tuition district (PreK-6) where Hartland and Weathersfield extend school choice to their 7th and 8th graders and become Prek-6 elementary schools.

II. Alternative Structures

In addition, given the requirements of the law, the committee, on behalf of the district boards it represented, examined various alternative structures as the "best means" for meeting the requirements of Act 46.

"By {December 26, 2017}, the board(s) of a district (or group of districts) that will not be in a preferred, unified system by July 1, 2019 (a "non-merging district") is required to perform three tasks: (1) to conduct a self-evaluation of the district's current ability to meet or exceed each of the Goals; (2) to meet with the boards of other districts in and outside the SU to discuss ways to promote improvement relative to the Goals throughout the region; and (3) to submit proposals individually or jointly to merge or work together in some way – *i.e.*, proposals to be in an "alternative structure." *(AOE Memorandum – Guidance: Proposals by One or More Non-Merging Distracts for an Alternative Structure, July 29, 2016)*

Under the law, Act 46 states in Section 5, regarding alternative structures, that a supervisory union composed of multiple member districts, each with its separate school board, can meet the State's [education]

goals, *particularly* if:

1. The member districts **consider themselves to be collectively responsible** for the education of all PreK-12 students residing in the supervisory union;
2. The SU operates in a manner that **maximizes efficiencies** through economies of scale and the flexible management, transfer, and **sharing of nonfinancial resources** among the member districts;
3. The SU has the **smallest number of member school districts** practicable, and
4. The **combined average daily membership** of all member districts is not less than 1,100.
5. A Preferred Structure is **not possible/practicable or not the best model**;

An Alternative proposal under Act 46, Sec. 9 shall:

(1) *Demonstrate the district's or districts' due diligence and **provide sufficient, thoughtful data** and documentation in support of the proposal.*

(2) ***Include a comparison of options** considered, including consideration of a Preferred Structure.*

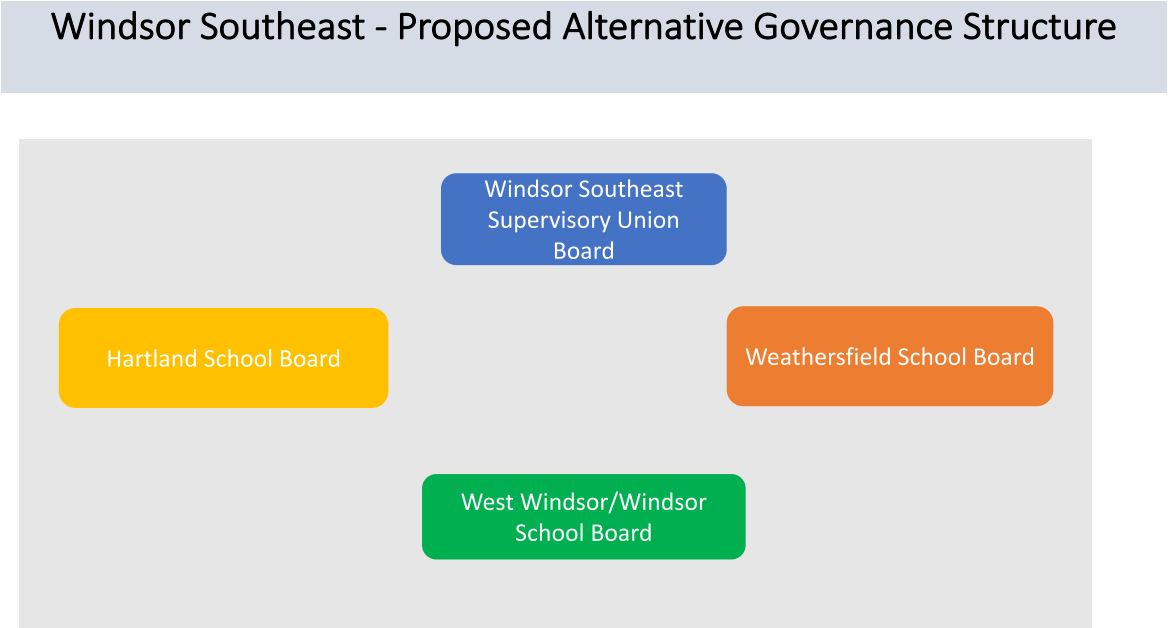
(3) ***Demonstrate on what basis the State Board would be able to "conclude that this alternative structure ... is the best means of meeting the [Goals] in a particular region**" as the Board is required to do pursuant to Sec. 8(b).*

With these goals/requirements in mind, the Committee explored, to date, three potential alternative structures:

D. **Maintaining Windsor Southeast's existing supervisory union** operating structure (without tax incentives) of four independent, but cooperative local school boards with one supervisory union board with an enhanced strategic capacity for addressing district-wide educational and policy issues.
E. **Maintaining Windsor Southeast's existing supervisory union, but with the fewest school boards practicable.** This would entail a merger of the Hartland and Weathersfield school boards into a single unified union board governing both schools. All other local governance structures within the current supervisory union would remain, but the supervisory union board would be given an enhanced strategic capacity on district-wide educational/policy issues. *Note: Given the differing operating structures of Windsor and West Windsor, no unification of those districts is possible within Windsor Southeast without a vote of the electorate to change their current operating structure to match one or more of the other districts in the region.*
F. **Proposing a merger of the Windsor and West Windsor school districts** into a single unified union PreK-12 school district, maintaining the current governance structures of Hartland and Weathersfield as autonomous PreK-8 operating districts within the context of their existing supervisory union, with the SU governed by an SU board with an enhanced strategic capacity for addressing district-wide educational and policy issues.

Proposed Alternative Structure

After a thorough review of all the relevant demographic, fiscal, educational, and operational data, members of the Act 46 706 Committee, along with the school boards that represent the citizens of the communities in our SU, believe that there is clear evidence for the State Board to conclude that the "best means" for achieving the goals of Act 46 in our region is by one clear path: to merge the Windsor and West Windsor school districts into a single unified union PreK-12 school district, maintain the current governance structures of Hartland and Weathersfield as autonomous PreK-8 operating districts within the context of Windsor Southeast's existing supervisory union, and overall governance by an SU board.



We believe it is essential to the success of any proposed change in governance in our region that it move forward with the support of the majority of students, parents, and citizens whom we represent in order to insure ongoing support for and engagement in our schools. Over the years, our communities have demonstrated an ongoing and unwavering commitment to providing students across the four school districts a high-quality education within varying governance structures - and at a cost points that they value is evidenced by:

- the high levels of community engagement throughout this process; and
- the high levels of community involvement in our schools, and
- the unwavering financial support our citizenry has shown their schools by consistently passing district budget appropriations across WSESU.

Final Introductory Thoughts:

Over the past 20 months, the work we have done together has opened up new lines of strategic communication and mutual understanding. We believe it is in the best interest of our students to build upon both established and emerging patterns of district-wide cooperation and trust. This has already resulted in a dynamic vision of continuous improvement for all our schools while at the same time maintaining the requisite autonomy to respond to the unique matrix of education need exhibited in each community.

We believe that supervisory union structures can work, and are working here in Windsor Southeast as evidenced by the performance and operational data at the heart of this report. The proposed merger of Windsor and West Windsor is specifically designed to address the demographic and fiscal trends facing the community of West Windsor in order to insure in that community sustainable/cost effective educational programs of the highest quality.

Reflected throughout this report are concrete steps we have taken, and intend to take, to fulfill our collaborative vision of SU governance and achieve the goals of Act 46.

SELF-STUDY PART 1: MEETING THE GOALS OF ACT 46

SECTION 1: DEMOGRAPHIC DATA

Part A: Enrollment Data

Windsor Southeast Elementary Enrollment Trends 2003–2016 (14 years):

	K-8 Enrollment From 03-04 to 16-17 (September 6, 2016)		
	2003-2004	2016-2017	% Change
Weathersfield School	264	205	-22.35%
Hartland Elementary School	377	312	-17.24%
Albert Bridge School (K-6 Only)	71	63	-11.27%
Windsor School	361	322	-10.80%

Windsor Southeast Elementary Enrollment Trends: 2012-2016 (5 years) (Oct 1, 2016):

	Windsor Southeast K-8 Enrollment From FY' 12-13 to FY'16-17		
	2012-2013	2016-2017	% Change
Weathersfield School	231	205	-11.26%
Hartland Elementary School	299	312	4.35%
Albert Bridge School (K-6 Only)	77	63	-18.18%
Windsor School	327	322	-0.62%

Note: Windsor Southeast -Actual Elementary Enrollment figures 2012-2016 (Oct 1, 2016)

Albert Bridge	**Hartland**	**Weathersfield**	**Windsor**
2012: 77	2012: 299	2012: 231	2012: 324
2013: 85	2013: 291	2013: 240	2013: 341
2014: 80	2014: 305	2014: 215	2014: 341
2015: 71	2015: 309	2015: 204	2015: 304
2016: 63	2016: 312	2016: 205	2016: 327

Windsor Southeast District ADM Trends: 2011–2015 (5 years):

	Windsor Southeast ADM From FY'12 to FY'16		
	2011-2012	2015-2016	% Change
Hartland	462.50	465.40	0.6%
Weathersfield	311.96	298.60	-4.0%
West Windsor	137	137.65	0%
Windsor	453.58	435.42	-4.0%
Vermont	89,114.62	86,957.61	-2.4%

Windsor Southeast District Equalized Pupil Trends: 2012-2016 (5 years) (Actual):

	Equalized Pupil Counts 2016 - 2017
Hartland	486.03
Weatherfield	327.40
West Windsor	137.07
Windsor	495.69
Vermont	88,455.67
	Equalized Pupil Counts 2012-2013
Hartland	460.64
Weatherfield	314.86
West Windsor	134.57
Windsor	478.13
Vermont	89,691.52
	% Change
Hartland	5.5%
Weatherfield	4.1%
West Windsor	1.8%
Windsor	3.6%
Vermont	-1.3%

Summary Findings – Enrollment Trends

Like the rest of Vermont, the size of Windsor Southeast's elementary population has declined over the past 14 years. In recent years, however, the negative trend lines in Hartland seem to have reversed themselves, while in Windsor student population seems to have stabilized. Regardless, despite serving smaller populations of elementary students, the educational programs across the schools in WSE remain vibrant and comparable to elementary programs across the state, representing the value that citizens in this region place on offering a quality education to their children. *(See Section 2 – Program Review)*

However, declining enrollments at the Albert Bridge School in West Windsor put enormous pressure on that district's capacity to continue to equitably meet the educational needs of its students without prohibitively high levels of education spending. This reality proved to be an important consideration for the Committee

representatives from West Windsor as they explored alternative governance structures that might ensure the continued existence of their community school, lower local tax rates, and expanded educational opportunity for students.

Part B: Changing Trends in Students Receiving Free and Reduced Lunch in WSE

Albert Bridge School (West Windsor)
2016-17 - 36%
2015-16 - 35%
2014-15 - 35%
2013-14 - 29%
2012-13 - 25%

Hartland Elementary School
2016-17 - 42%
2015-16 - 36%
2014-15 - 37%
2013-14 - 42%
2012-13 - 38%

Weathersfield School
2016-17 - 43%
2015-16 - 38%
2014-15 - 40%
2013-14 - 48%
2012-13 - 46%

Windsor School (K-12)
2016-17 - 40%
2015-16 - 44%
2014-15 - 49%
2013-14 - 48%
2012-13 - 48%

Summary Findings – Student Need/Performance Gap

Trend lines for students receiving Free and Reduced Lunch (FRL) at WSE schools over the last 5 years have a made a dramatic and uneven shift across the SU: Albert Bridge is up 11% and Hartland is up 4%; while Weathersfield is down 3% and Windsor is down 8%. Sociologically and demographically, *something* is happening in our supervisory union. 2012 pretty much marks the beginning of a trend that appears to be continuing.

While it is hard to speculate how things will look three to five years from now, the educational challenge of addressing the particular needs of poorer students is already persists in our SU as evidenced by the performance gap in SBAC scores between FRL students and Non-FRL students – particularly in Hartland and West Windsor. *(See Section 3: Analysis of SBAC Results)*

SECTION 2: PROGRAM REVIEW - EQUITY, QUALITY, AND VARIETY OF EDUCATIONAL OPPORTUNITY

WINDSOR SOUTHEAST – ALLIED ARTS COMPARISON BY SCHOOL

SCHOOL	ART	MUSIC	PHYS.ED.	PLP	FOREIGN LANGUAGE	LIBRARY/ED. MEDIA	DESIGN TECH ED	THEATER
ALBERT BRIDGE SCHOOL (K-6)	K-6 = 40 min/wk	K-6 = 40 min/wk	K-4 = 40 minutes 2 days/wk	None	K-6 = 40 min/wk	K-4 = 30 min/wk	None	None
			5-6 = 60 minutes 2 days/wk					
HARTLAND ELEMENTARY SCHOOL (K-8)	K-5 = 40 min/wk. Plus 40 min/every other wk	K-5 = 40 min/wk	K-5 = 40 minutes 2 days/wk	None	K-5 = 40 min/wk	K-5 = 30 min/wk	None	None
		6-8 = 45 min/wk	6-8 = 45 minutes 2 days/wk		6-8 = 45 min 4 days/wk	None		
	6-8 = 45 minutes 2 days/wk							
WEATHERSFIELD SCHOOL (K-8)	K-8 = 48 min/wk	K-6 = 48 min/wk	K-8 = 48 minutes 2 days/wk	None	K-4 = 48 min/wk	K-6 = 48 min/wk	None	None
		7-8 = 50 min 2 days/wk for 9 weeks			7-8 = 50 min 2 days/wk for 9 weeks	7-8 = 48 minutes 2 days/wk		
WINDSOR SCHOOL (K-8)	K-6 = 45 min/wk	K-4 = 45 min/wk	K-6 = 45 min 2 days/wk	K-6 = None	None	K-6 = 45 min/wk	K-6 = None	K-6 = None
	7-8 = 53 min every day for a semester	5-6 = 45 minutes 2 days/wk 7-8 = 53 min every day for a semester	7-8 = 53 min every day for three quarters/health for last quarter	7-8 = 35 min every day year-long		7-8 = None	7-8 = 53 min every day for a semester	7-8 = 53 min every day for a semester

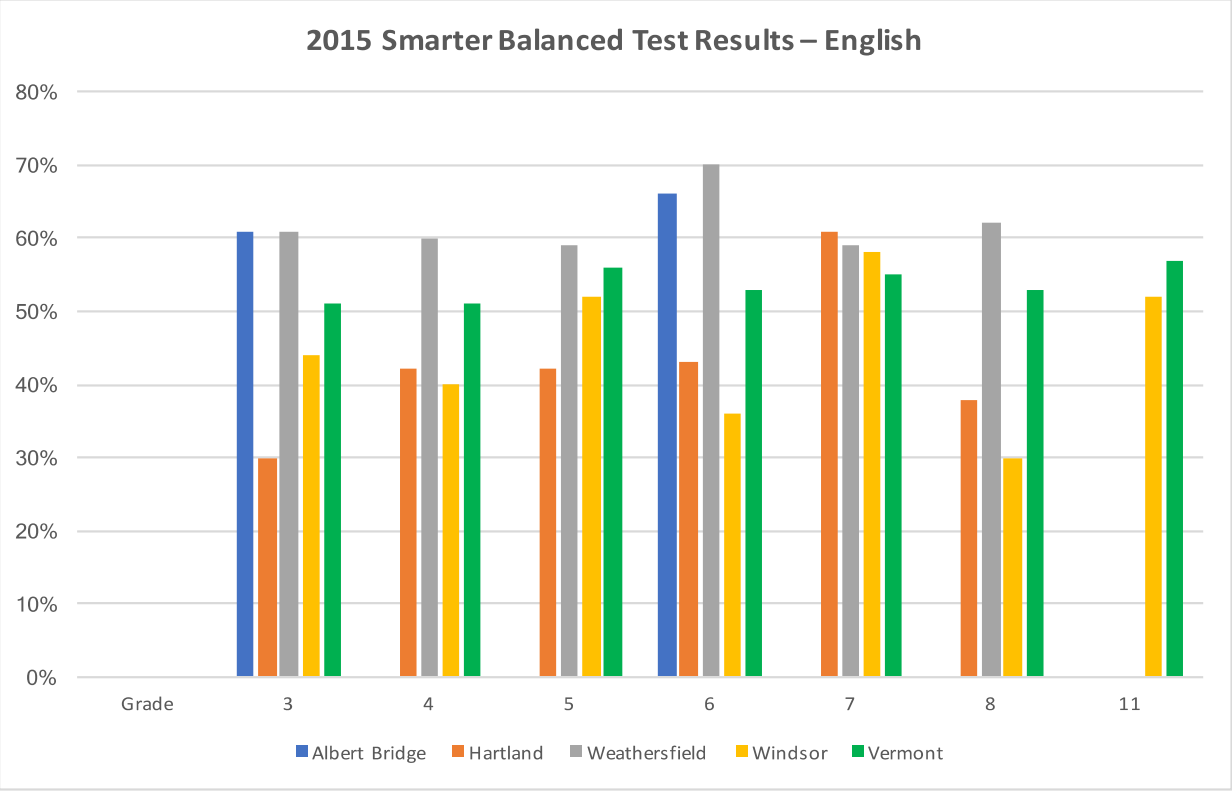
Summary Findings/Observations – Program Equity, Quality, and Variety:

A program review of the elementary curriculum at each of the schools in WSE revealed substantial variety, quality, and equality of opportunity comparable to the best schools in Vermont. Only Windsor offered two additional elementary programs for 7th and 8th graders unavailable in the other schools – Design/Tech Ed and Theater – a fact that is under review for potential program enhancement in the coming years by those schools.

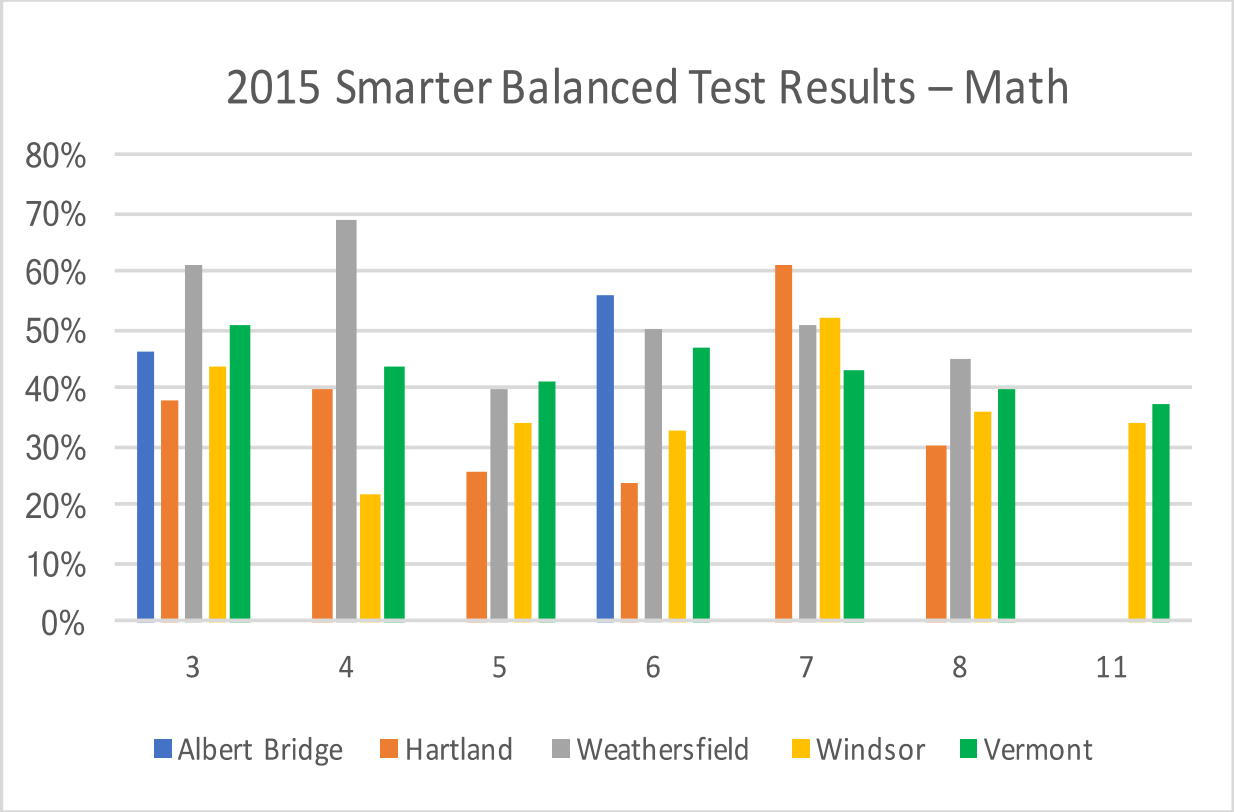
Section 3: Student Performance

Part A: SBAC Data

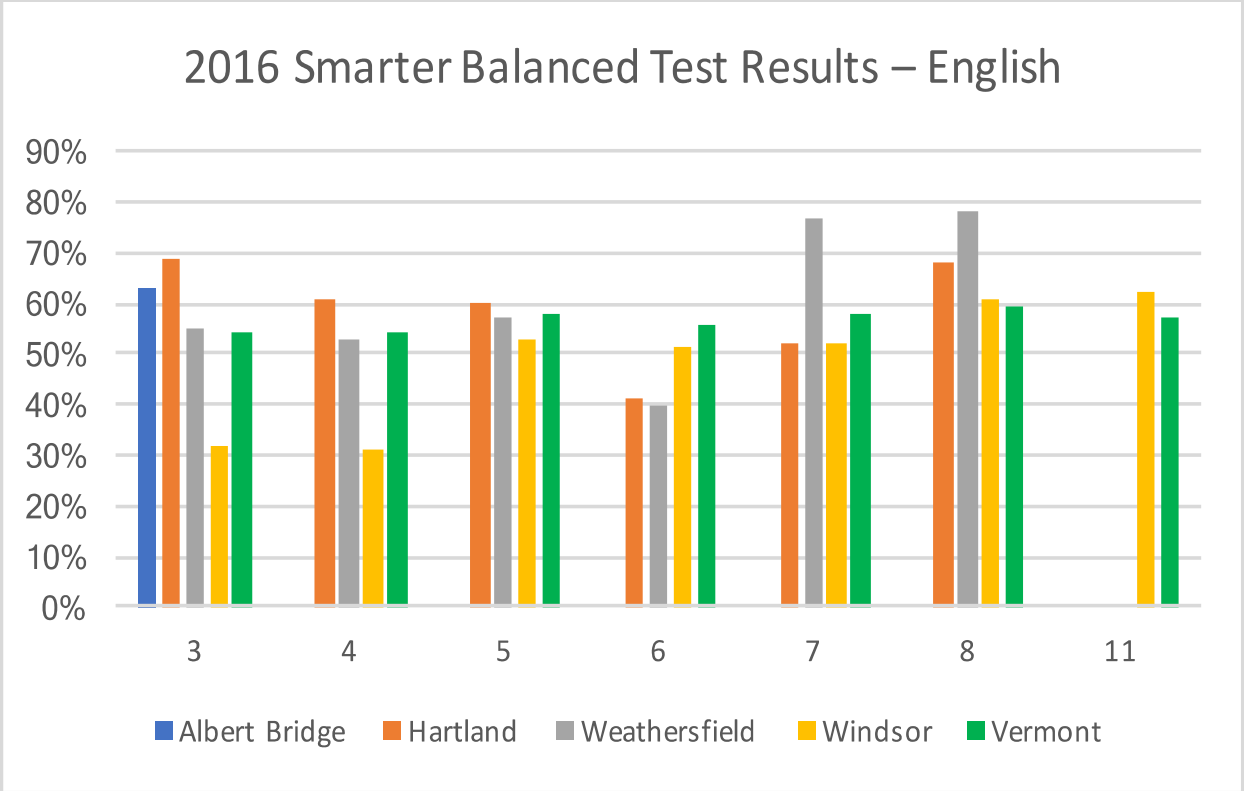
2015 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
		Albert Bridge	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
Grade						
3	All	61%	30%	61%	44%	51%
4	All	Not Enough	42%	60%	40%	51%
5	All	Not Enough	42%	59%	52%	56%
6	All	66%	43%	70%	36%	53%
7	All	N/A	61%	59%	58%	55%
8	All	N/A	38%	62%	30%	53%
11	All	N/A	N/A	N/A	52%	57%



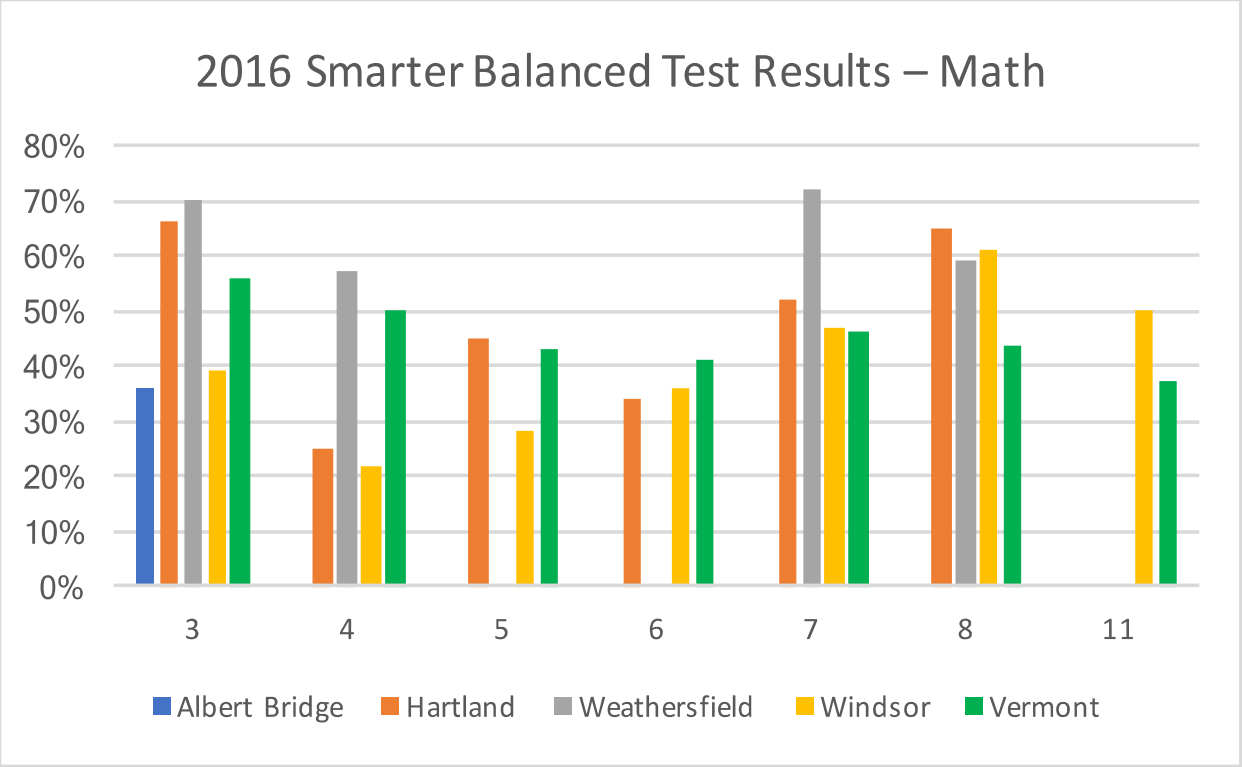
2015 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3	All	46%	38%	61%	44%	51%
4	All	N/A	40%	69%	22%	44%
5	All	N/A	26%	40%	34%	41%
6	All	56%	24%	50%	33%	47%
7	All	N/A	61%	51%	52%	43%
8	All	N/A	30%	45%	36%	40%
11	All	N/A	N/A	N/A	34%	37%



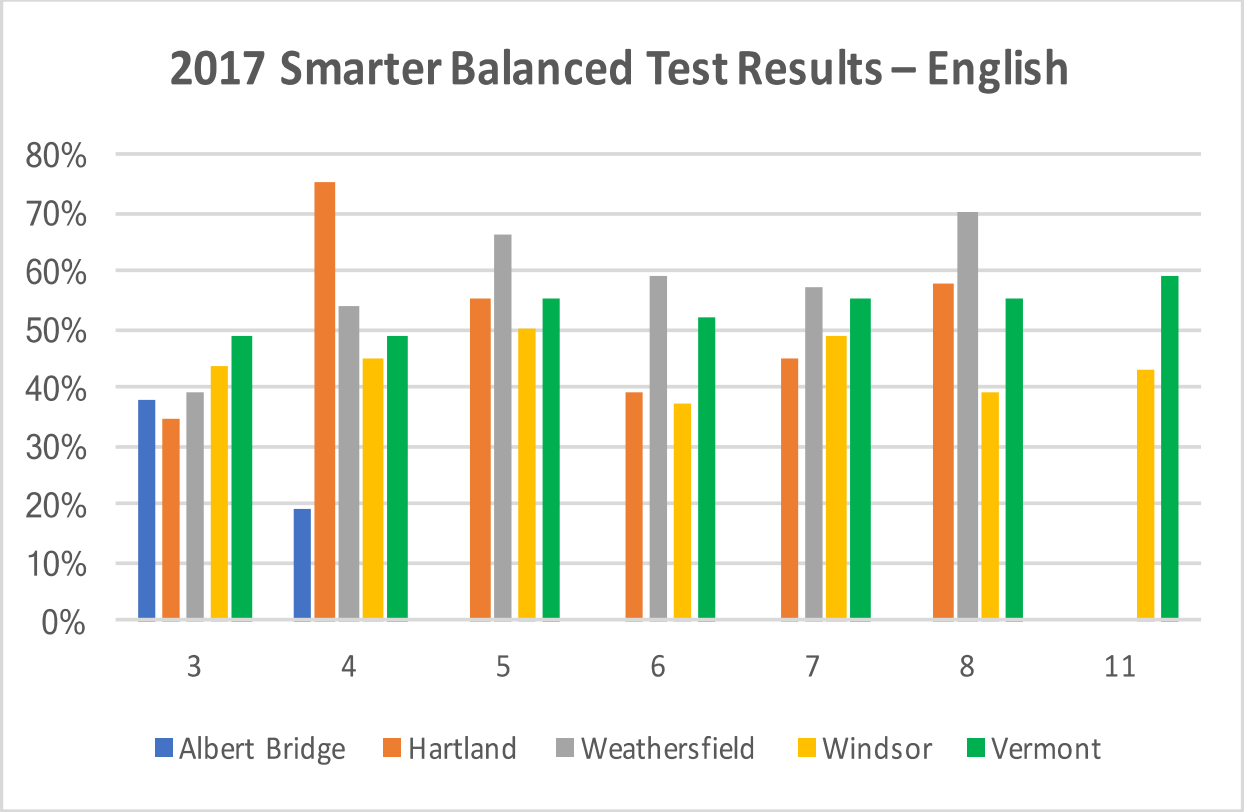
2016 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3	All	63%	69%	55%	32%	54%
4	All	N/A	61%	53%	31%	54%
5	All	N/A	60%	57%	53%	58%
6	All	N/A	41%	40%	51%	56%
7	All	N/A	52%	77%	52%	58%
8	All	N/A	68%	78%	61%	59%
11	All	N/A	N/A	N/A	62%	57%



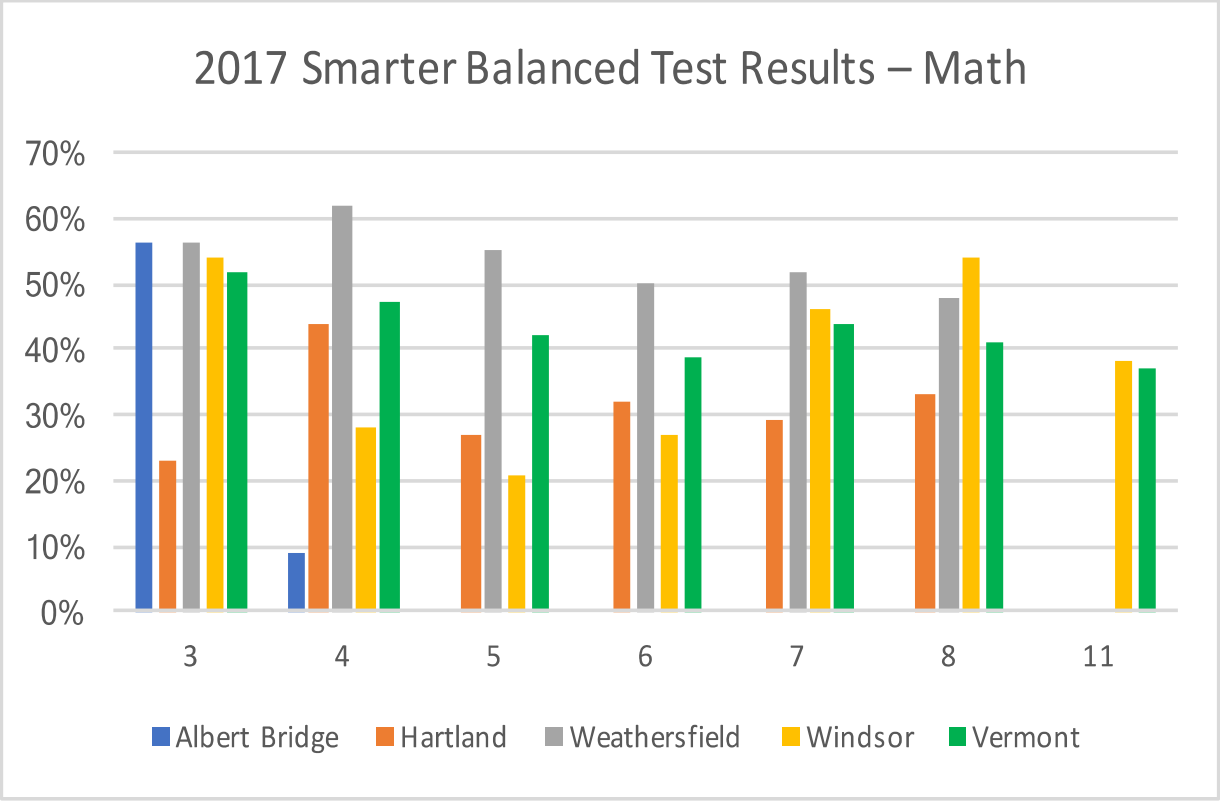
2016 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3	All	36%	66%	70%	39%	56%
4	All	N/A	25%	57%	22%	50%
5	All	N/A	45%	N/A	28%	43%
6	All	N/A	34%	N/A	36%	41%
7	All	N/A	52%	72%	47%	46%
8	All	N/A	65%	59%	61%	44%
11	All	N/A	N/A	N/A	50%	37%



2017 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3	All	38%	35%	39%	44%	49%
4	All	19%	75%	54%	45%	49%
5	All	N/A	55%	66%	50%	55%
6	All	N/A	39%	59%	37%	52%
7	All	N/A	45%	57%	49%	55%
8	All	N/A	58%	70%	39%	55%
11	All	N/A	N/A	N/A	43%	59%



2017 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3	All	56%	23%	56%	54%	52%
4	All	9%	44%	62%	28%	47%
5	All	N/A	27%	55%	21%	42%
6	All	N/A	32%	50%	27%	39%
7	All	N/A	29%	52%	46%	44%
8	All	N/A	33%	48%	54%	41%
11	All	N/A	N/A	N/A	38%	37%



Free and Reduced % By School

ABS – 35%; HES – 37%; Weathersfield – 40%; Windsor K-6 – 55%; 7-12 – 44%; Vermont State Avg – 39%

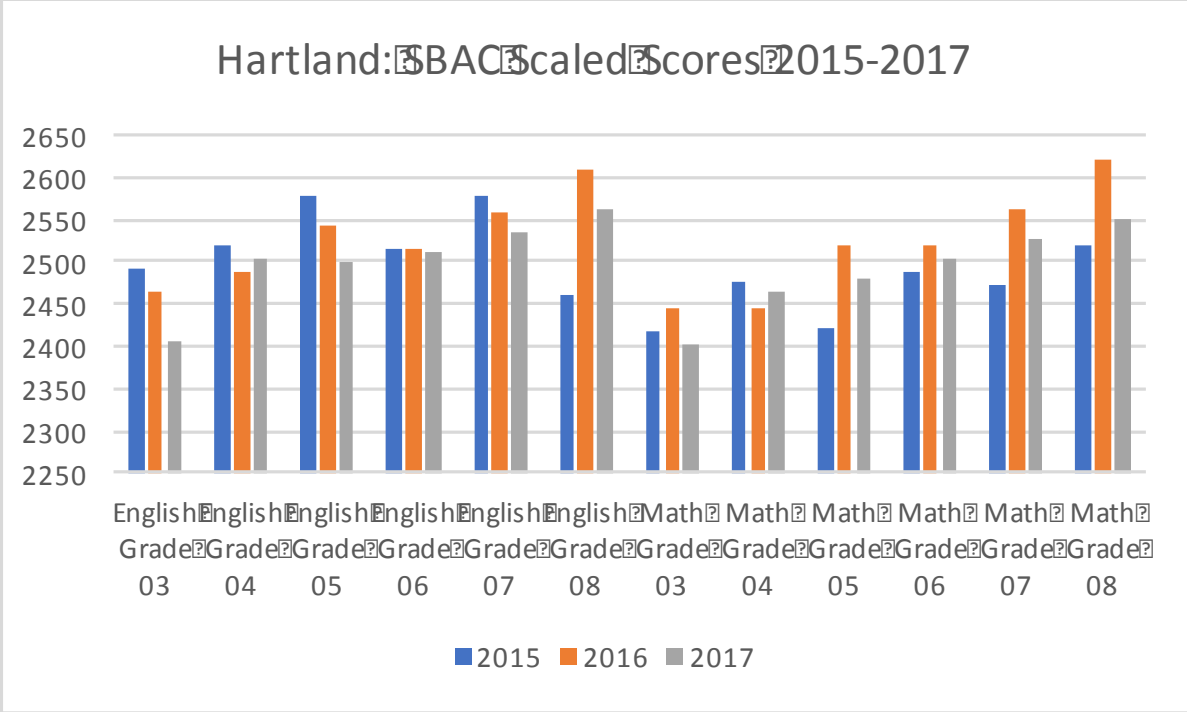
Support Services % By School (IEP, 504, EST)

ABS – Not Enough; HES – 9%; Weathersfield – 21%; Windsor K-6 – 17%; 7-12 – 12%; Vermont State Avg – 24%

Part B: SBAC Scaled Score Comparison: 2015-2107

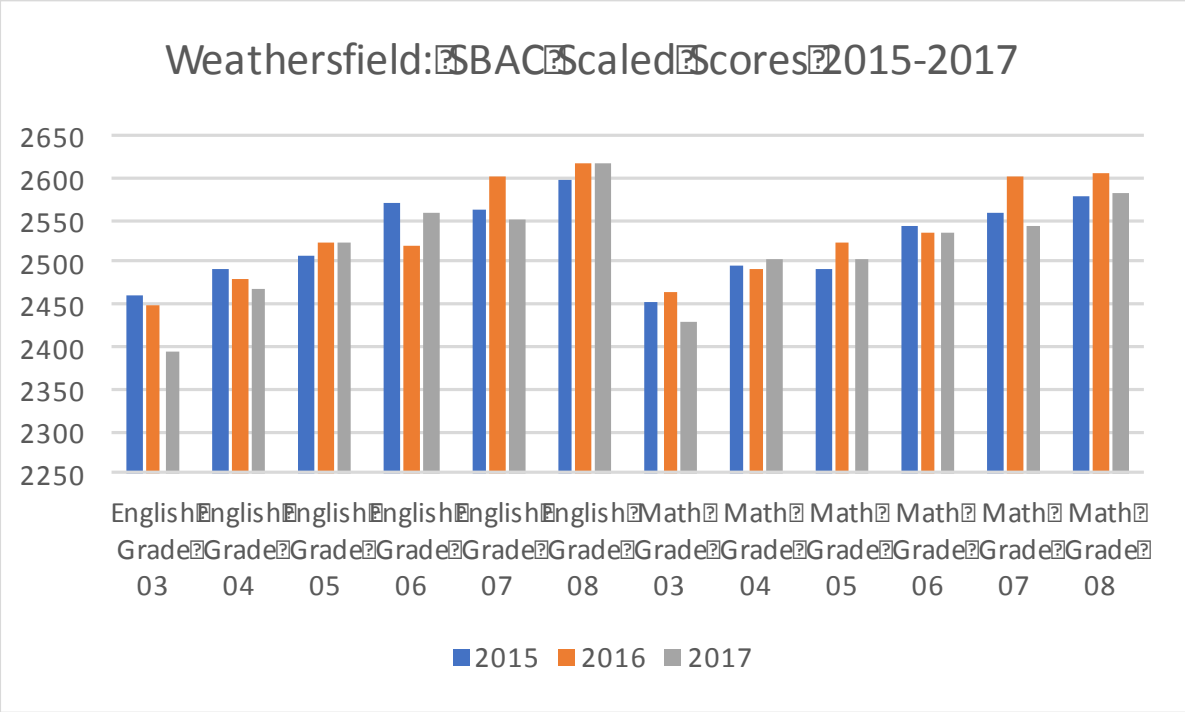
Hartland: SBAC Scaled Scores 2015-2017

	2015	2016	2017
English Grade 03	2493.3	2464.1	2407.2
English Grade 04	2519.1	2487.0	2505.4
English Grade 05	2577.1	2544.8	2498.0
English Grade 06	2513.9	2514.8	2513.4
English Grade 07	2577.5	2559.8	2534.9
English Grade 08	2462.1	2610.1	2563.2
Math Grade 03	2416.1	2443.8	2400.9
Math Grade 04	2477.6	2444.1	2463.8
Math Grade 05	2422.5	2520.8	2478.5
Math Grade 06	2486.7	2519.1	2504.8
Math Grade 07	2472.0	2562.9	2525.8
Math Grade 08	2519.3	2619.4	2551.7



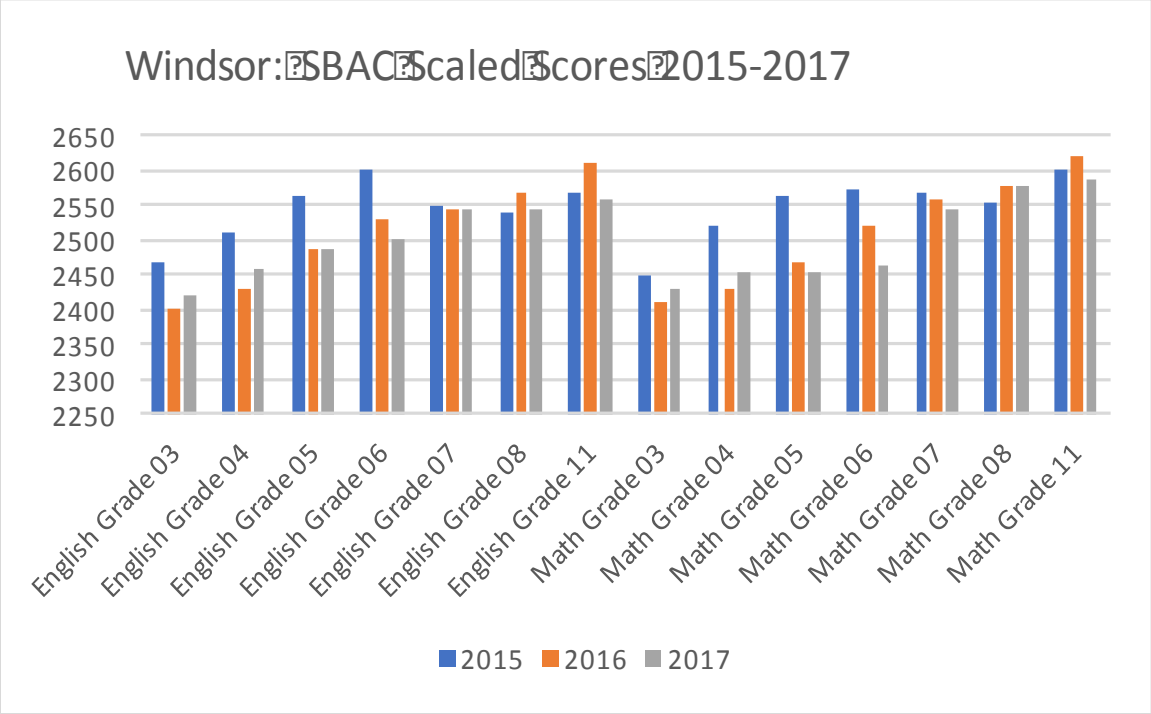
Weathersfield: Scaled Scores: 2015-2017

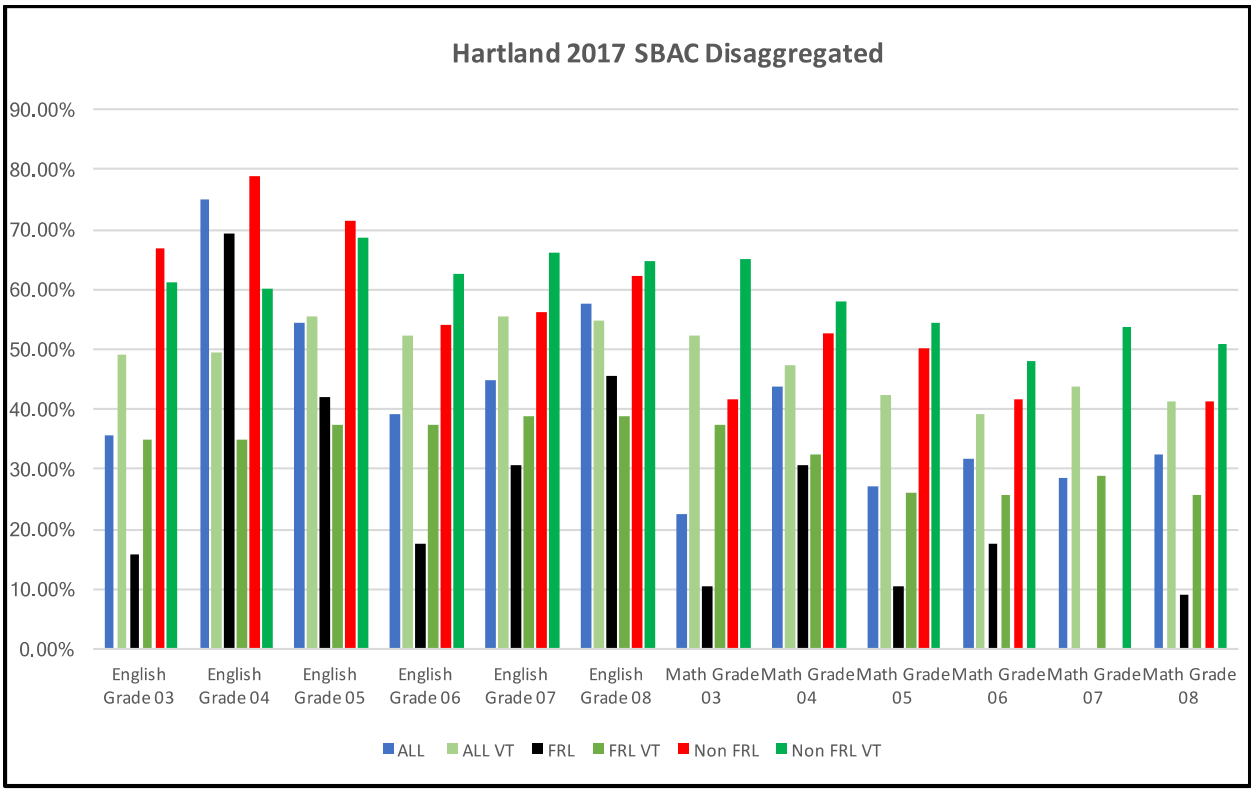
	2015	2016	2017
English Grade 03	2460.4	2448.5	2394.2
English Grade 04	2492.5	2481.9	2469.5
English Grade 05	2506.5	2523.3	2521.9
English Grade 06	2570.1	2517.9	2558.4
English Grade 07	2564.3	2601.0	2549.9
English Grade 08	2596.2	2618.7	2617.9
Math Grade 03	2452.2	2465.3	2430.3
Math Grade 04	2495.6	2493.3	2502.1
Math Grade 05	2493.6	2521.9	2505.4
Math Grade 06	2543.9	2533.5	2533.1
Math Grade 07	2559.3	2602.3	2544.7
Math Grade 08	2578.5	2603.8	2583.0

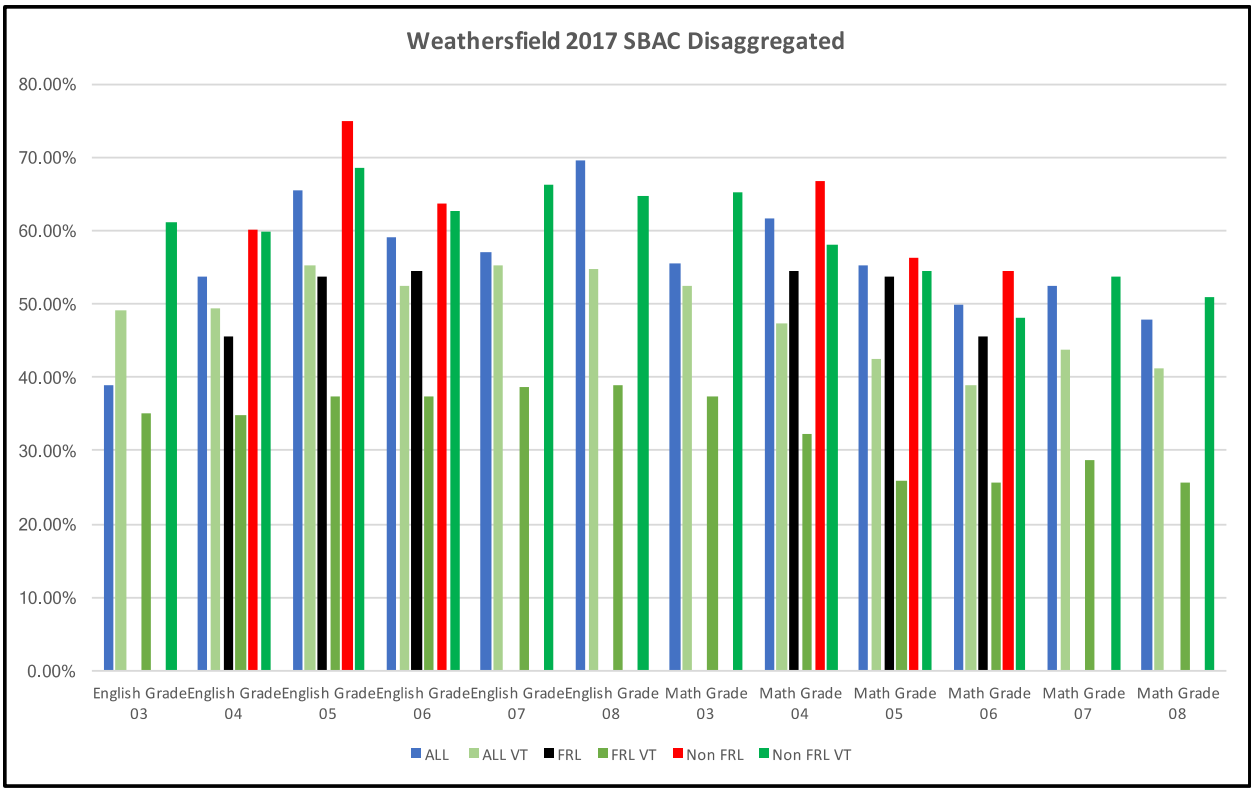


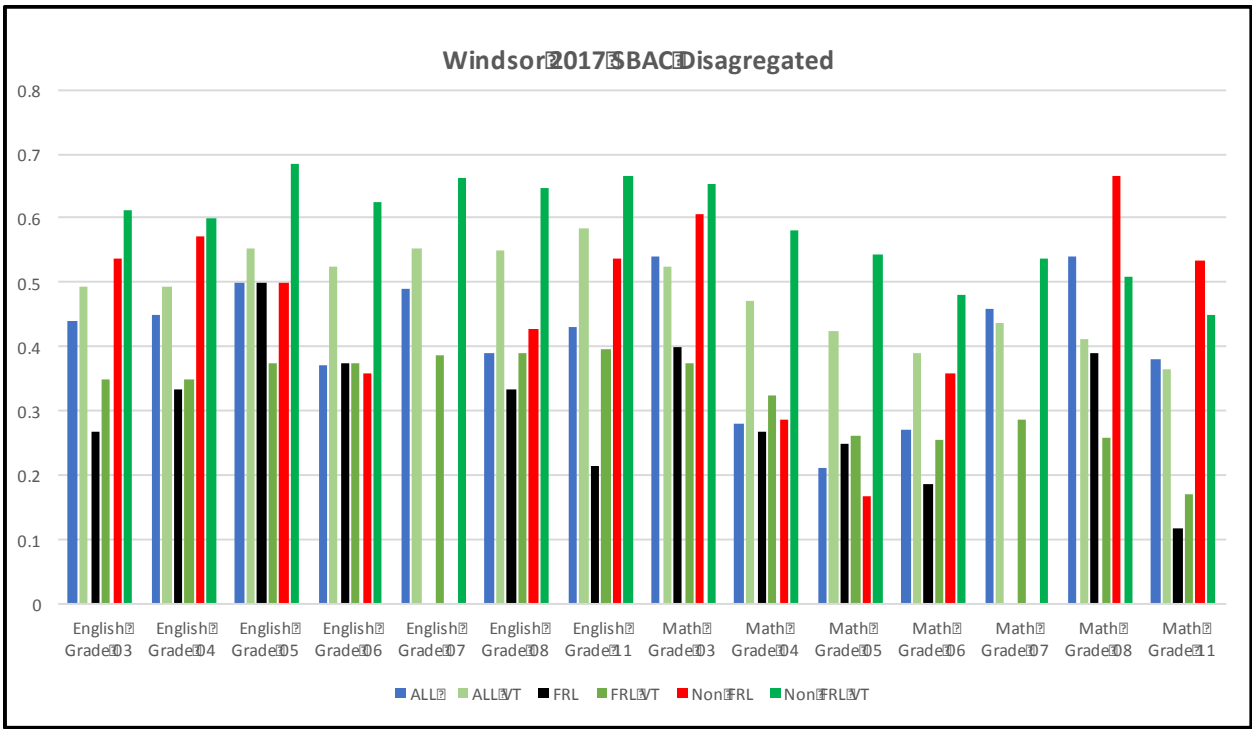
Windsor: SBAC Scaled Scores 2015-2017

	2015	2016	2017
English Grade 03	2468.4	2403.4	2418.1
English Grade 04	2510.4	2428.1	2460.0
English Grade 05	2560.9	2488.3	2485.3
English Grade 06	2601.3	2528.1	2501.0
English Grade 07	2548.7	2541.4	2544.7
English Grade 08	2540.2	2568.9	2542.4
English Grade 11	2566.1	2609.5	2559.8
Math Grade 03	2446.5	2412.2	2431.8
Math Grade 04	2519.3	2430.1	2455.0
Math Grade 05	2560.4	2469.5	2453.0
Math Grade 06	2571.1	2519.6	2464.5
Math Grade 07	2567.5	2557.8	2545.6
Math Grade 08	2553.3	2574.7	2577.0
Math Grade 11	2601.2	2617.9	2584.5




Hartland 2017 SBAC Disaggregated
90.00%
80.00%
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
English Grade 03
English Grade 04
English Grade 05
English Grade 06
English Grade 07
English Grade 08
Math Grade 03
Math Grade 04
Math Grade 05
Math Grade 06
Math Grade 07
Math Grade 08
ALL
ALL VT
FRL
FRL VT
Non FRL
Non FRL VT


Weathersfield 2017 SBAC Disaggregated
80.00%
70.00%
60.00%
50.00%
40.00%
30.00%
20.00%
10.00%
0.00%
English Grade 03
English Grade 04
English Grade 05
English Grade 06
English Grade 07
English Grade 08
Math Grade 03
Math Grade 04
Math Grade 05
Math Grade 06
Math Grade 07
Math Grade 08
ALL
ALL VT
FRL
FRL VT
Non FRL
Non FRL VT


Windsor 2017 SBAC Disagregated
0.8
0.7
0.6
0.5
0.4
0.3
0.2
0.1
0
English Grade 03
English Grade 04
English Grade 05
English Grade 06
English Grade 07
English Grade 08
English Grade 11
Math Grade 03
Math Grade 04
Math Grade 05
Math Grade 06
Math Grade 07
Math Grade 08
Math Grade 11
ALL
ALL W/T
FRL
FRL W/T
Non FRL
Non FRL W/T

Part C: SBAC Grade Eleven Score Comparison – Central Vermont

2016 Grade 11 SBAC Scores: (% of Students Proficient and Above)

ELA	All Students	Free & Reduced	Non-Free & Reduced
Windsor HS	**62%**	**33%**	**76%**
Bellows Falls UHS	55%	50%	60%
Green Mtn UHS	53%	47%	58%
Hartford HS	42%	23%	47%
Springfield HS	41%	29%	46%
Woodstock HS	67%	63%	68%
Vermont	**57%**	**38%**	**65%**

Math	All Students	Free & Reduced	Non-Free & Reduced
Windsor HS	**50%**	**33%**	**57%**
Bellows Falls UHS	45%	33%	56%
Black River HS	14%	Not enough students	
Green Mtn UHS	29%	21%	37%
Hartford HS	23%	3%	28%
Springfield HS	20%	14%	23%
Woodstock HS	44%	29%	49%
Vermont	**37%**	**19%**	**45%**

2017 Grade 11 SBAC Scores: (% of Students Proficient and Above)

ELA	All Students	Free & Reduced	Non-Free & Reduced
Windsor HS	**43%**	**22%**	**54%**
Bellows Falls UHS	67%	57%	71%
Green Mtn UHS	41%	26%	52%
Hartford HS	39%	20%	44%
Sharon Academy	80%	No FRL Students	80%
Springfield HS	49%	49%	49%
Woodstock HS	55%	47%	57%
Vermont	**59%**	**40%**	**67%**

Math	All Students	Free & Reduced	Non-Free & Reduced
Windsor HS	**38%**	**12%**	**53%**
Bellows Falls UHS	36%	20%	43%
Green Mtn UHS	23%	n/a	n/a
Hartford HS	29%	28%	30%
Sharon Academy	36%	No FRL Students	36%
Springfield HS	16%	14%	17%
Woodstock HS	42%	21%	47%
Vermont	**37%**	**17%**	**45%**

Part D: Average SAT Comparisons

AVERAGE SAT TEST SCORES

2016 Average	Free and R	Reading	Math	Writing	Total
Hanover High School	N/A	621	611	613	1845
Hartford High School	24%	509	517	483	1509
Montpelier High School	26%	587	555	559	1587
U-32 (2015)	30%	557	544	525	1626
Windsor High School	40%	520	553	483	1556
Woodstock Union HS	28%	563	556	537	1656
Vermont	44%	522	525	507	1554
US (2013)	N/A	496	514	488	1498

Vermont High School Profiles - 2016

Part E: Matriculation to Post-Secondary Education

College Matriculation – 2016

	Non Free/ R	4 yr College	2 Yr College	Total College
Hanover	N/A	N/A	N/A	N/A
Hartford	76%	58%	9%	67%
Montpelier	74%	72%	0 %	72%
U-32 (2015)	70%	56%	12%	68%
Windsor	60%	40%	12%	52%
Woodstock	72%	70%	8%	78%
Vermont	56%			52% (2013)

Vermont High School Profiles - 2016

Windsor High School – Post High School Plans
Top 20 GPA

2012 – 2016 (5 Years)

Americorp (2)
Burrlington College
Bryant
Bridgewater College
California Polytechnic State University
Castleton State (7)
College of Saint Joseph (2)
Colorado State
Community College of Vermont (4)
Dartmouth
Franklin and Marshall
George Mason
George Washington University (2)
Gordon College
Green Mountain College
Hampshire College
Husson University
Johnson State
Keene State College
Loyola
Lyndon State (2)
Maryville College
Merrimack College
Millersville University
New England School of Hair Design
Norwich University (4)
Paul Smith's College
Quinnipiac College
Rensselaer Polytechnic
River Valley Community College (2)
Roger Williams
Salve Regina
Seton Hall
San Diego University
St. Michael's College
SUNY - Cobleskill
Syracuse
Temple University
US Airforce
U.S. Navy (2)
University of Maine
University of Maryland
University of New England
University of New Hampshire (5)
University of Rochester
University of Southern California
University of Southern Maine
University of Vermont (13)
Vermont Technical College (3)
Weber State University
Wheelock College
Work (7)

Summary Findings/Observations – Student Performance:

Contextual Notes:

- *The size of grade level student cohort at the Albert Bridge School in West Windsor does not lend itself to data suitable for comparing student performance.*

- *During the first three years of SBAC administration, Hartland has endured inconsistent leadership. After three principals, including two interims, the school has finally hired a strong instructional leader who is beginning a school-wide discussion of student performance.*

- *Until 2009, instructional leadership was the responsibility of four separate principal/ superintendents. This "siloed" approach ended with the appointment of one Superintendent and a Director of Curriculum and Instruction, and the introduction of strategic planning process at the SU level to chart objectives, or design a path for continuous instructional improvement.*

The districts that make up the Windsor Southeast Supervisory Union present a complex portrait of student performance that represents the economic diversity of the students they serve. Individually, WSE schools can point to grade levels that either meet or exceed state standards. There are notable instances in 2017 where student performance exceeded that of neighboring districts in their region, as well as Vermont averages:

- ELA scores in Hartland and Weathersfield for grades 4 and 5;
- ELA scores for West Windsor in grade 3; *(Note: few grades at Albert Bridge have a large enough cohort to compare scores reliably);*
- Math scores in Hartland, Weathersfield, and Windsor for grade 3:
- Math results at Windsor High School for grade 11;

But the overall record of student performance in Hartland and Windsor remains uneven from grade to grade. Only Weathersfield consistently meets or exceeds state standards in both ELA and Math at every grade level.

When one disaggregates based on economic status, student results for 2017, both the successes and challenges in WSE become clearer. For example:

- In **Hartland**, Non-FRL students meet or exceed state standards in both English and Math at almost every grade level. The real issue, beyond ensuring a more consistent pattern of success at every grade level, is closing the performance gap for less-affluent students.
- In **Weathersfield**, Non-FRL students meet or exceed state standards in both English and Math; but it is the strong performance of less affluent students in Weathersfield who consistently out-perform students in similar cohorts throughout Vermont that underscores Weathersfield's strong aggregate performance results. In addition, Weathersfield has the smallest performance gap between these two economic cohorts.

- In **Windsor**, Non-FRL in grades 7, 8, and 11 consistently exceed state standards in both English and Math (except grade 11 English results in 2017), while performance results in earlier grades rise steadily for this same economic cohort of students. The challenge is duplicating these results for FRL students. Another bright spot in Windsor is that free and reduced lunch students in grade 11 consistently out-perform their Vermont peers on SAT exams in both reading and math.

Finally, an examination of scaled scores in all schools demonstrates improvement in student performance as individual cohorts of students move through their schooling. However, there exists, except in Weathersfield, an uneven pattern of performance in specific grades, suggesting a need to review instructional practice to ensure district-wide curricular choices are both in alignment with state exams and/or being implemented consistently. Weathersfield provides a strong model where district curricular and instructional choices are working.

Section 4: Spending/Operational Comparisons:

Windsor Southeast - 5 Year Trends in Educational Spending

	2012-2013	2013-2014	2014-2015	2015 - 2016	2016 - 2017	Total % Change	% Change per year
Hartland	$6,760,656	$7,141,104	$7,139,937	$7,491,871	$7,548,958	11.6%	2.3%
Weathersfield	$4,688,707	$5,129,544	$5,280,806	$5,208,601	$5,017,992	7%	1.4%
West Windsor	$1,789,476	$1,967,413	$2,052,660	$2,172,511	$2,527,196	41%	8.2%
Windsor	$6,257,508	$6,488,870	$6,584,558	$6,580,755	$6,619,338	5.7%	1.1%
Vermont	$1,158,735,933				$1,304,289,466	12.6%	2.5%

Windsor Southeast - 5 Year Trends in Education Spending/Equalized Pupil

	2012-2013	2013-2014	2014-2015	2015 - 2016	2016 - 2017	Total % Change	Ave % Change/yr
Hartland	$14,567	$15,256	$15,644	$16,533	$15,531	6.6%	1.3%
Weathersfield	$14,891	$15,507	$15,773	$15,648	$15,326	2.9%	0.6%
West Windsor	$13,026	$14,841	$15,657	$16,369	$18,437	41.5%	8.3%
Windsor	$13,087	$13,938	$14,270	$13,731	$13,353	2%	0.4%
Vermont	$12,788	$13,546	$14,008	$14,421	$14,421	12.7%	2.5%

Student/Teacher Ratios

	2012-2013	2013-2014	2014-2015	2015 - 2016	2016 - 2017
Hartland	10.66	11.92	14.36	12.86	13.57
Weathersfield	11	13.64	12.84	12.59	13.15
West Windsor	12.83	14.17	7.27	8.56	13.00
Windsor School PK-12				12.04	13.49
Windsor E.	12.22	16.65	16.31		
Windsor M/H.	8.14	13.38	12.15		
WSE	10.09	11.84	10.97	10.44	11.10
Vermont	**10.61**	**10.56**	**10.55**	**10.41**	**10.55**

Student/Administrator Ratios

	2012-2013	2013-2014	2014-2015	2015 - 2016	2016 - 2017
Hartland	153	149	158	163	121.43
Weathersfield	77	120	215	209	234
West Windsor	77	85	80	77	78
Windsor School PK-12				180.67	202.33
Windsor E.	200	182	182.67		
Windsor M/H.	156	184.67	196		
WSE	81.21	97.75	98.25	72.13	77.24
Vermont	**102.51**	**104.57**	**104.24**	**97.71**	**100.41**

Windsor Southeast Enrollment/Teacher Staffing Patterns FY'17

	K		Grade 1		Grade 2		Grade 3		Grade 4		Grade 5		Grade 6		Grade 7		Grade 8	
	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers	# Students	# Teachers
A.B(K-6)	6	1	7	1	7	1	18	1	12	1	Multi-Grade Team 9 + 5 = 14			1	N/A		N/A	
Har(K-8)	37	2	33	2	33	2	31	2	34	2	31	2	Multi—grade "Team" 43+ 31 + 40 = 114					4
WF(K-8)	21	2	27	2	22	2	19	1	26	2	Multi-Grade "Team" 29 + 22 + 20 + 23 = 94							5
Wind(K-8)	34	2	40	2	28	2	47	3	30	2	Multi-grade Team 33 + 30 = 63			4	Multi- Grade Team 38 + 42 = 80			4

Note: Current elementary enrollment (FY'17) – Albert Bridge: 64, Hartland: 313; Weathersfield: 209; Windsor: 322
Note: Staffing data does not include paraprofessionals/teacher aids, allied arts teachers, or instructional/guidance specialists working in each school

Windsor Southeast: Student Teacher Ratio's FY'17

	K	Grade 1	Grade 2	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio	Student/Teacher Ratio
Albert Bridge (K-6)	6/ 1	7/ 1	7/1	18/1	12/1	14/1		N/A	N/A
Hartland (K-8)	18.5/1	16.5/1	16.5/1	15.5/1	17/1	15.5/1	28.5/1		
Weathersfield (K-8)	10.5/1	13.5/1	11/1	19/1	13/1	18.8/1			
Windsor (K-8)	17/1	20/1	14/1	15.6/1	15/1	15.8/1		20/1	

Note: Student/Teacher Ratios are not the same as class averages, particularly when looking at multi-age teams

Profile of Teacher Corps – Windsor Southeast
(December 8, 2016)

Professional Study:

	Albert Bridge		Hartland		Weathersfield		Windsor		WSSU	
	Number	**%**	**Number**	**%**	**Number**	**%**	**Number**	**%**	**Number**	**%**
BA	4	36%	4	13%	6	29%	12	23%	2	11%
BA +15	1	9%	3	9%	2	10%	3	6%	2	11%
BA +30	0	-	5	16%	5	24%	4	8%	3	16%
MA	5	45%-	12	38%	7	33%	18	35%	8	42%
MA +15	1	9%	7	22%	1	5%	2	4%	2	11%
MA +30	0	-	0	-	0	-	5	10%	1	5%
MA +45	0	-	1	3%	0	-	7	13%	1	5%
PHD	0	-	0	-	0	-	1	2%	0	-

Years of Service:

	Albert Bridge		Hartland		Weathersfield		Windsor		WSSU	
	Number	**%**	**Number**	**%**	**Number**	**%**	**Number**	**%**	**Number**	**%**
0-5	4	33%	12	38%	7	33%	29	56%	15	79%
6-15	7	58%	11	34%	7	33%	10	20%	3	16%
15+	1	8%	9	28%	7	33%	13	25%	1	5%

Summary Findings/Observations – Operational Efficiency:

In terms of centralized operations, Windsor Southeast is a fairly young supervisory union. In July of 2009, the supervisory union board decided to end the practice of "siloed" leadership by four separate principal/superintendents and strengthen instructional and operational leadership at the SU level by hiring a full-time superintendent and instructional leaders for curriculum and special education, as well as for financial operations and human resources. After two interim superintendents, for five years WSE has enjoyed consistent leadership of its SU.

During that time, the SU has:

1. Centralized the management of all grants and federal funds ensuring the money has been used wisely and effectively;
2. Hired a curriculum coordinator who has worked across schools to establish an SU curriculum in Literacy and Math aligned with state and national standards;
3. Centralized leadership of the support services and core operations including:
   - ✓ Technology infrastructure and hardware/software purchasing:
     a. Servers and core instructional software for entire SU housed at central office;

b. A centralized web-site presence for the SU, including websites for each school; instructional/technology support;
c. Provision of chrome books in all schools;
d. Utilization of one student information system – e.g. Power School;

- ✓ Provision of a single telephone/communication infrastructure.
- ✓ Management of food services;
- ✓ Transportation Services

4. Negotiated an SU wide master agreement for all individual district employees
5. Centralized the leadership and delivery of special education services.
6. Centralized administration of all PK programs;

The committee would point to the operational effectiveness of these administrative initiatives as evidenced by the SU's generally low student-to-administrator ratio and most importantly, an annual growth rate in both educational spending and education spending per equalized pupil over the past five years well below the state average (except as noted earlier for West Windsor).

While student teacher ratios are slightly higher than state averages at the elementary school level, they are consistent across the SU, ensuring equal access to quality programing for all students in WSE that reflect a breadth of program opportunities comparable to the best schools in Vermont.

Section 5: Transparency, Accountability, and Community Engagement

The schools of Windsor Southeast have always experienced a strong connection with their residents. Most notably, citizens have consistently supported WSE schools over the years by approving their district's budgets year in and year out – itself a clear statement concerning the "value" that Windsor Southeast parents and taxpayers hold for their school. Of particular note in this regard was the bond vote of Windsor citizens to renovate their PreK-12 school infrastructure at a financially challenging time for the community – a vote that clearly communicated a commitment to the educational future of the Windsor schools. But, look across the SU, and you will see similar investments in every school across the union.

The residents of Windsor Southeast have always participated actively in the affairs of their community schools. This merger study has been no different. From the beginning of our merger study process, residents expressed the concern that "regionalization" might distance their community from their school's governance structure. In addition, the residents in each of the choice districts in WSE were also concerned about any governance solution that would eliminate school choice in those communities where it was currently available. On the other hand, they wanted a clear exposition of the choices available to them and the educational, operational, and financial impact that alternate governance configurations would have on the capacity of their communities to offer high quality educational programs to all of the children served in their SU. In short, citizens wanted to make an informed decision concerning the future of their schools.

Included in the *Appendix* of this report are the results of community surveys undertaken after a series of public forums outlining those governance options. Those results will be discussed in more depth later in this report.

Summary Findings - *Transparency, Accountability, and Community Engagement*

The universal finding across the communities that make up Windsor Southeast is that our citizenry has always insisted on a transparent and accountable system of educational decision-making. In that regard, the self-study process that resulted in this proposal for an Alternative Structure represents further evidence of meeting this important goal in Act 46.

In addition, it is important to note that this process has already resulted in

1. Enhanced board and community understanding of all our schools and the children they serve.
2. Enhanced patterns of PreK-12 strategic thinking and planning across our supervisory union.
3. New opportunities to learn about each other's programs and instructional practices.
4. An updated/comprehensive plan for continuous instructional and operational improvement to supplement and enhance the SU's current strategic plan grounded in:
    a. A sustained emphasis on analyzing common data points across all schools, programs, and students.
    b. Agreed upon strategic priorities at the board, administrative, and instructional levels.
    c. An emphasis on clear and transparent vertical curriculum alignment.
    d. The communication, beginning with this report, of a more integrated picture of the work being undertaken in our schools, including yearly updates on academic progress formally presented in every community.

SELF-STUDY PART 2: "BEST MEANS"

Introduction:

As noted earlier in the introduction to this report, the Windsor Southeast joint 706 committee identified four potential merger options for meeting the goals of Act 46. To vet these options, the committee identified a shared educational vision, as well as an accompanying set of principles as a context for considering each option. To be clear, the Committee was looking for a governance path forward that would achieve a singular mission and agreed-upon set of core educational and operational principles. ***This statement of vision and principles also represents an articulated set of strategic objectives to undergird our proposal's plan for continuous improvement.***

Vision Statement

The Study Committee envisions a sustainable governance structure specifically designed to address the educational needs and personal aspirations of every student in its care and to graduate skilled, confident, creative, and compassionate citizens ready to take their place in the world.

Educational Goals/Principles

We will continue and strengthen policies and initiatives that:

1. Develop and support educational programs that:

    a. Result in schools that "break the mold," that rank among the best in the state and the nation.
    b. Ensure academic excellence as measured by a range of objective measures including, but not limited, to state assessments, SAT scores, matriculation rates and college acceptances.
    c. Assess students on the basis of proficiency in, and mastery of, established core skills and content to ensure students are ready for the next step in their lives.
    d. Offer multiple pathways for learning that address the needs and aspirations of a diverse student body.
    e. Provide opportunities for students of different ages to learn and work together, e.g. older and younger students sharing their experience working with and learning from one another.
    f. Ensure all students are able to communicate and share their ideas powerfully and effectively.
    g. Offer every student a well-rounded academic experience (The Humanities, Math, and Science; the Arts and Foreign Languages; Life and Technical skills, etc.), as well as a diverse range of after-school activities/offerings.
    h. Offer extended/enhanced learning opportunities that address student needs and interests across all curricular areas.

i. Foster within students a sense of compassion and empathy towards others, particularly those with different cultures, customs/traditions, belief, and abilities.
j. Enable cross-disciplinary learning activities.
k. Continue to break down the walls between school and community and extend student learning out into the world through vibrant partnerships and place-based learning that takes advantage of what is unique about our local communities, our cultural heritage, and our land.
l. Offer vibrant, age-appropriate, service learning programs that foster within every student both civic values and the requisite leadership skills to make a difference in their communities.
m. Teach and nurture within students the habits of mind and heart essential to academic and personal success.

II. Develop and support instructional strategies that:

a. Enable students to progress in their learning in accordance with their specific needs, interests/loves, learning styles, and personal goals.
b. Differentiate according to student needs and provide the appropriate combination of personal and instructional intervention, remediation and/or enhancement.
c. Foster creativity and a love for the arts through curricular and co-curricular programs.
d. Create personal resiliency and a constructive response to adversity and academic challenge.
e. Develop skills in personal inquiry, collaboration and mutual problem-solving.
f. Foster in students a love of learning – now and throughout their lives.
g. Prepare students to be independent learners and critical thinkers willing to share their ideas and skilled in research, problem-solving, and the productive use of technology.
h. Put students at the center of their own learning.
i. Create excitement and encourage students to fully participate in class.
j. Foster students who love school and want to attend.
k. Utilize more experiential/hands-on learning strategies.
l. Prepares students for the creative, productive, responsible use and ethical application of current and emerging technologies including their impact on society.

III. Foster a safe, supportive, nurturing learning environment that:

a. Creates opportunities for students to form strong relationships across grade levels.
b. Ensures and protects every student’s right to learn, free of distraction or personal harassment.
c. Celebrates the diverse contributions of every student, as well as, the differences that make every student unique.

d. Provides students real opportunities to have a voice in the direction of their education.
e. Communicates to students the highest expectations for academic achievement, compassionate behavior, and personal responsibility, and provide the requisite supports for helping them achieve those goals.
f. Is engaging and fun.

IV. Establish a shared, unified educational vision across the district to support:

a. The coordination and sharing of best practices across all of the district's schools.

V. Continue to explore and evaluate new and emerging instructional models for addressing the needs of all children.

Operational Goals/Principles:

We will continue and strengthen policies and initiatives that:

I. Establish a clear, collaborative system of governance across our supervisory union that will support and deliver quality educational programs shaped by rigorous educational standards, high expectations for student achievement, and enhanced, equitable learning opportunities for all students.

II. Create a professional environment that celebrates great teaching and fosters an engaged corps of teachers dedicated to their instructional and personal growth/development.

III. Attract the very best teachers to our district, by offering competitive salary packages and supporting their personal growth and development with engaging and meaningful professional development opportunities and to achieve this goal in a manner that is fiscally responsible and attentive to the values of community members.

IV. Support class sizes that encourage strong instructional relationships between students and teachers

V. Foster a spirit of operational and instructional innovation designed to address the ongoing and emerging needs of students throughout the district, within the context of school cultures that preserve and build upon valued traditions and established best practices.

VI. Create communication and marketing strategies that ensure that our district's educational opportunities and programs are recognized throughout Vermont as nurturing, rigorous, and competitive, making the Mountain Unified School District a place to which families will want to move, live, and raise their children.

VII. Develop long-term school development strategies in response to the needs and aspirations of our students, teachers, and staff that ensure the quality and sustainability in a fiscally responsible manner.

Community Involvement:

We will continue and strengthen policies and initiatives that:

I. Support strategies across the district to foster new levels of parental and community involvement in our schools, including meaningful opportunities to contribute to student learning (community volunteers; school/community partnerships).

II. Provide extensive opportunities for community involvement in all matters that come before the board, including educational vision and goals, district policy, and budget.

III. Support parents in becoming active, meaningful, and responsible partners in their children's education.

GOVERNANCE OPTIONS: ANALYSIS

The district then assessed all of the relevant data to create an educational, fiscal, and operational picture of the current supervisory union and the emerging challenges facing Windsor Southeast; this was foundational exploring the relative costs and benefits of each governance option relative to achieving the goals of Act 46. The committee then initiated community-wide dialogue across the SU concerning the educational costs and benefits of each option.

A summary of each option and the study's findings follows:

Option 1: Mount Ascutney Unified Union School District (Preferred Structure)

Governance Description

Creating a unified union school district from Windsor Southeast Supervisory Union's current districts would result in a single PreK-12 operating district for the children of Hartland, Weathersfield, West Windsor, and Windsor governed by a single school board representing each of these "forming" communities. Under this proposal, Articles of Agreement between all four communities would need to be crafted to govern the new unified union and voters in all communities would need to vote in favor of such a union. A unanimous vote in favor of unification would result in the loss of choice for the students in the three districts that elect to join the new district.

Central to this proposal is the creation of what the Committee tentatively named **Mountain Academy**, a new high school designed to serve every student in the new unified union district. The new high school would serve approximately 450 students. Currently, Windsor High School educates 216 students.

During the first four years of the Academy's operation, high school students already attending other schools in the region would be grandfathered to maintain their attendance at the current schools of their choice. Therefore, the total school population at Mountain Academy would grow incrementally over the years, allowing time for new programs to be fully implemented over that time.

Working with the students and teachers of Windsor High School, a vision of the new school's program of study and core instructional practices was developed consistent with the most state-of-the art educational practices – many of them currently defined by state law in Act 153. The Committee envisions the creation of a **"Multiple Pathway, Proficiency-Based High School,**" offering instructional programs unrivaled in the area.

Note: For a full description of the Unified Union presented to community members, including projected costs and taximplications, see Appendix A.

Among the key costs and benefits of this proposal are the following:

A. Middle High School – New/Enhanced Program of Study:

Core/Foundational Program		Multiple Pathways**	
Grade 9	**Grade 10**	**Grade 11**	**Grade 12**
Literacy, Literature Communication	**Literacy, Literature Communication**	**Creative Expression:** **a. Performing Arts** **b. Visual Arts**	
Geometry I	**Algebra I, II**	**Engineering and Creative Design**	
History, Social Science, Research	**History, Social, Science, Research**	**Environmental Studies**	
Foreign Language, Cross Cultural	**Foreign Language, Cross Cultural**	**Research Sciences**	
Chemistry Biology	**Physics Earth Science**	**Human Development and Social Services**	
Arts/Technology	**Arts/Technology**	**Leadership**	
Physical Education	**Physical Education**	**Global Studies**	
Health	**Health**	**Liberal Studies**	
Computer Science	**Coding**	**Entrepreneurship and Business**	

**** In addition to the pathways outlined above, students working with their academic advisor, could design their own unique pathway to graduation.**

The 9/10 Foundational Program is a two-year, multi-disciplinary, team-taught, instructional program defined by clearly articulated sets of student outcomes in terms of core content, skills, and proficiencies, resulting in a solid foundation for whatever pathway students choose to take. This core would be supported by curricula unified across all PK-8 instructional programs.

11th and 12th Grade Learning Pathways:

The chart of the Academy's multiple learning pathways identifies the thematic units of study that students could elect to pursue. These pathways represent an integration of traditional core and elective courses.

In addition, all 11th/12th grade Graduation Pathways are supported by a wide range of cutting-edge best-practices including:

- Direct Instruction
- Internships
- Community Based Learning Opportunities
- Dual Enrollment Courses
- Project Based Learning
- Internet Courses

- Capstone Projects and Independent Research
- Personal Learning Plans and Portfolios
- Student Exhibitions of Learning
- Focused Remediation and Acceleration (individualized student support programs)

B. Elementary School Program Enhancements:

The proposal also made the following recommendations to enhance instruction and program opportunities across the new unified district's four elementary schools:

- Expanded programs in Instrumental/Choral Music.
- Additional instructional time in Art.
- Additional instructional time in Library and Media Studies.
- Introduce Drama/Dance Programs.
- Integrate Engineering/Robotics Learning opportunities
- Create Science Learning Labs; Science Specialist.
- Enhanced after and before school programing (clubs).
- Equalize Foreign Language opportunities

C. Projected Staffing Needs:

Middle/High School:

Projected high school staffing levels needed to serve 450+ students at Mountain Academy = 45.7 FTE's (Full Time Equivalents)

Note: This does not account for current administrative team of two (2) administrative assistants, two (2) assistant principals, one principal, one School Resource Officer, and one HCRS Title I position

Elementary Schools:

Additional Staff (Elementary, Middle, and High School) = 22.7 FTE's (Full Time Equivalents)

Note: these additional staff include:

- *World Language: 1*
- *Music: .3 (current position is .7)*
- *STEM Coordinator: 1*
- *Art: .2 (current position is .8)*

D. Proposed Facility Enhancements/Renovations

Middle/High School:

Instructional renovations:

- 11 new core classrooms: including 2-3 new specialized science labs, and arts spaces
- 3 additional office spaces to house expanded programs in guidance; a flex coordinator to assist students in planning community and individualized learning programs; and additional support clinicians)
- A restructured upper track to include a dance studio and open weight room.
- Additional Cafeteria Space
- Maker spaces to support individualized program activities and project-based learning

Proposed Facility Enhancements:

- Ice Rink (build in West Windsor at the former Ascutney Ski Area (a structure similar to Springhouse at Jackson Gore)
- indoor/Outdoor Pool for swim team (possibly in coordination with town)

E. Summary of Cost Projections – Mt. Ascutney Unified Union District with New Regional High School

Staffing/Instruction:	**~ $1,500,000 /year**
Capital Costs:	**~ $800,000/year**
Elementary Program Enhancements:	**~ $500,000/year**
New operational cost projections:	**~ $200,000/year**
Total Projected Costs per year:	**~$3million**

Note: The districts that make up the Windsor Southeast Supervisory Union currently spend ~ $3.9 million annually in net tuition costs *(See Appendix A)* for students not attending Windsor High School. After subtracting the projected cost of establishing a new unified district with a regional high school, the remaining ~ $1 million/year ongoing that could be directed towards other educational needs or put towards tax relief across the district.

Net budgetary savings = ~$1million during first four years
Phased in over 4 years = ~$250,000 per year

F. Projected Homestead Tax Rates for Unified District

Equalized Homestead Tax Rates Unified District: 2% annual growth in Spending

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5557	1.5080	1.5593	1.6113	1.6639
Weathersfield	1.5799	1.5544	1.4767	1.5080	1.5593	1.6113	1.6639
West Windsor	1.9006	1.6916	1.6070	1.5267	1.5593	1.6113	1.6639
Windsor	1.3765	1.2936	1.3583	1.4262	1.4975	1.5724	1.6639
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356
Windsor	1.3765	1.2936	1.3195	1.3459	1.3728	1.4002	1.4282

Summary approximate tax impact over 5 years on a $150,000 home (incentives only):

a. Hartland: tax savings of $1,191 (~$238 savings/year)
b. Weathersfield: tax savings of $648 (~$130 savings/year)
c. West Windsor: tax savings of $1,913 (~$383 savings/year)
d. Windsor: tax increase of $978 (~$196 increase/year)

Summary Findings Option 1 – Unified School District

Of all of the governance options explored by the committee, creating a new regional high school as part of a unified union school district serving all of the communities that currently make up the WSESU was the most ambitious and far reaching. In order to provide its citizens with a clear basis upon which to consider this option realistically, the committee worked with faculty and students at Windsor High School to create an articulated/practical vision of what a Regional High School (Mount Ascutney Academy) could offer. The proposed curriculum, staffing patterns, and facilities built on the latest research on best high school practice, current law (Act 77), and the expressed needs and aspirations of real students who worked on the proposal with their teachers and administrators.

In addition, the committee carefully modeled the financial requirements of operating a new high school for 450 students, including the cost of required renovations to Windsor High School to accommodate the proposed program of study and the increased student body. Finally, the proposal outlined the tax implications and projected operational savings of a unified district – resources that could have been used to further enhance instruction or reduce taxes.

Key Obstacles to Merger:

A. School Choice

The proposal was vetted by citizens in multiple community meetings and surveys held throughout the Supervisory Union. (See Appendix F). While there was strong interest in unification by the citizens of Windsor and West Windsor, the communities of Hartland and Weathersfield were overwhelmingly against any proposal that would require them to give up school choice for their high school students.

B. School Identity/Community Engagement

To a lesser extent, communities in WSE outside of Windsor also expressed opposition to the very concept of a unified governance structure that might alter the very structure, identity, and traditions of their schools - and possibly undermine current levels of parent and citizen engagement in those schools - diluting the power of local citizens to direct and shape the evolution of the educational programs currently serving their children.

As a result, the opposition to this option by many citizens across WSE, the committee concluded that recommending the creation of a unified union district failed to meet one of the core charges of the study process – "to propose a governance structure that citizens could support."

Final Contextual Notes on Proposal for a Creating a Single Unified Union District in WSE:

1. Previous Regional Education Studies:

This is not the first time the communities that make up the WSE have examined and rejected the idea of a unified union regional high school. The last proposal was crafted in 1992 along with proposed Articles of Agreement. However, after a series of public forums in the fall of 1992, the proposal was dropped. Then as now, maintaining school choice was a crucial consideration in that decision.

2. Regional Impact on Neighboring Districts:

As the committee reviewed all of the options available to WSE under Act 46, we also became interested in looking at the Upper Valley as a region and investigated the enrollment patterns in Upper Valley high schools. Act 46 states that the optimal size for a high school, in terms of quality, sustainability and equity, is 600-900 students. We learned that even if all Upper Valley towns were to wholeheartedly embrace the preferred merger models under Act 46, only one high school would meet the goals of the law: Hanover High School, which is already over 600 students and is located in New Hampshire (It is considered a public Vermont high school because of Norwich's membership in an interstate school district.). *See Figure 1.*

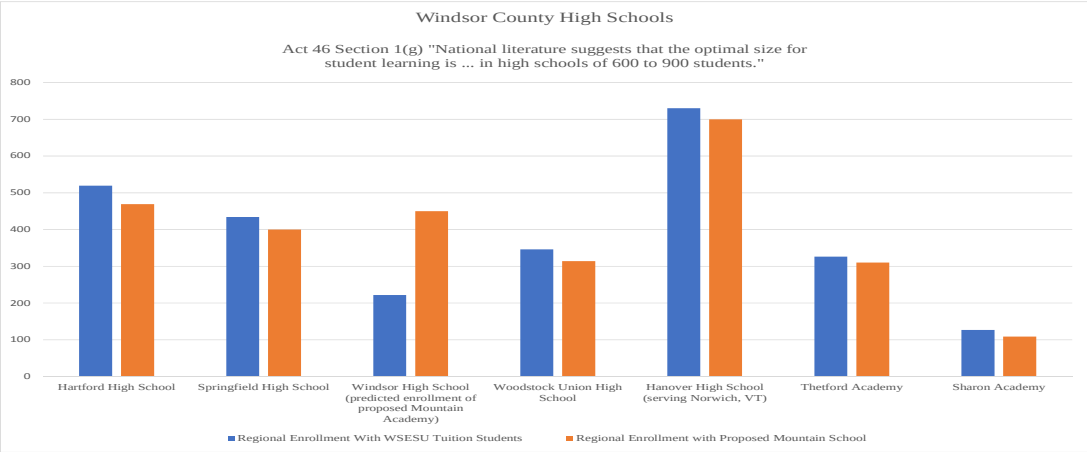


Figure 1.

When the Committee looked the **enrollment impact of full unification in WSESU**, the data showed that it would bring "Mountain Academy" (Windsor Middle/High School) closer to, but still fairly far away from, the goal of 600-900 students and would take other high schools in the area farther away from the goal. In particular, the collective impact of Hartford, Weathersfield, and West Windsor giving up high school choice and forming a unified regional high school in WSE, would result in 232 *(FY'18*) fewer WSE students attending area high schools, undercutting the enrollments, budgets, and as a consequence, the educational opportunities currently offered students by these schools in our region – Woodstock Union (37), Hartford (54), Springfield (27), Thetford Academy (18), Hanover (52), as well as, Sharon Academy (10). ***(See Appendix G)***

At various points in the Act 46 process, the committee tried to discuss a more regional, "big picture" approach with other districts -- for example a large union high school district with multiple high schools, a consortium of high schools that could serve as magnet open to all students in the Upper Valley, or the consolidation of high schools to 3 or 4 and a system of choice across the Upper Valley. The main obstacle to considering these ideas was the exemption by Act 46 of almost all of our potential regional partners from the State-wide Plan due to their size and status as a single school district. There was no way to convene a discussion about it. Other obstacles included concerns from smaller districts in our region about losing representation in a large regional district, as well as general concerns by many educators and citizens about the unwieldiness of large governance entities covering so large a geographical area.

Option 2: 2X2 Regional Education School District
Side-by-Side supervisory Union (Preferred Structure)

Governance Description

Creating a new **2x2 Regional Education District** or (R.E.D) would result in a supervisory union structure in Windsor Southeast made up of two unified union school districts. In a side-by-side, one new district must result from the union of two or more like districts, and must be a PreK-12 operating district. The other side must result from the union of two or more like tuition operating districts with the same operating configuration.

The side-by side configuration that was considered would arise from the unification of West Windsor and Windsor forming the PreK-12 unified union; the other side would result from the unification of Hartland and Weathersfield as PreK-8 operating districts continuing to offer high school choice. To legally achieve this structure, however, the citizens of West Windsor would have to agree to give up choice for their students (7-12) and create a single operating district (PreK-12) with Windsor.

Analysis 1: Hartland/Weathersfield Merger

Financial Note:

The unification of the Hartland and Weathersfield School districts was not projected to result in any substantive operational savings other than those savings that might arise through maximizing purchasing and other operational efficiencies in the management of a unified district.

A. Cost Benefit Analysis – Hartland/Weathersfield Merger:

Opportunities

- Districts have similar per pupil spending levels, staffing ratios, test scores, etc. ensuring minimal impact on tax rates and spending priorities.
- Representation on board would be essentially equal.
- Unification would probably would not involve laying off teachers or significantly increasing taxes.
- Both communities have similar educational values and priorities, ensuring cooperation and mutual problem-solving in a unified board.
- Could work together to create shared enrichment and gifted/talented programs at the middle school level.
- Could share staff or use online teaching to improve middle school programs.

- Could result in greater instructional and program collaboration based on sharing best practices.
- District-wide strategic planning across both schools based on reviewing student performance to improve outcomes.
- Board could hire principals who might share similar visions and approaches.
- Continue to foster individual school autonomy and innovation while sharing of best practices.

Challenges

- Distance between schools and the fact that towns are non-contiguous makes sharing staff or resources, programming, reconfiguring schools, introducing school choice, closing a school, etc. difficult.
- Hartland has slightly higher average tuition costs.
- Little overlap in the high schools that students attend, making follow-up studies on graduate performance more difficult to produce.
- Financially, a merger wouldn't free up much money for improvements at either school.
- Program "equity" between the two schools would need to be discussed and defined.

B. Projected Homestead Tax Rates for Hartland/Weathersfied Unified District:

Hartland/Weathersfied Merger: Incentivized Merger; 2% annual growth in Spending.

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5562	1.6089	1.6623	1.7163	1.7710
Weathersfield	1.5799	1.5544	1.5562	1.6089	1.6623	1.7163	1.7710
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (incentives only):

a. Hartland: tax savings of $567 (~$113 decrease/year)
b. Weathersfield: tax increase of $95 (~$19 increase/year)

Summary Findings: Hartland Weathersfield Merger

The central question of this merger study has focused from the outset on how any proposed change in governance would educationally benefit children. Specifically, how would a new, unified governance structure – in this case between Hartland and Weathersfield – provide better, more equitable learning opportunities for children, better support schools to achieve or exceed the State's Educational Quality Standards, and achieve these goals more efficiently.

Key Obstacles to Merger 1: Unclear Educational/Operational Benefits

After careful consideration, **the committee was unable to identify clear educational or operational benefits for proposing a merger between Hartland and Weathersfield.** Both districts provide their students with comparable educational opportunities at similar per pupil spending levels driven by similar staffing ratios. Both schools are individually sustainable based on current demographic trends and operational costs. While student performance on state assessments in Hartland is uneven across grade levels, student performance in Weathersfield consistently meet and exceed state standards. The reasons for this disparity outlined earlier in this report include differences in the stability of school leadership in the implementation of the SU's curriculum and changes in student demographics, especially the increased population of students in Hartland who are on free and reduced lunch. The committee sees no evidence to support the conclusion that merging governance structures would somehow lead to improved student performance in either school – and could achieve the opposite result if parents withdrew support for their schools due to feeling disenfranchised. The fact is that the operational supports for improving student performance already exist at the supervisory union level and are applied maximally in each school in the district.

In short, Hartland and Weathersfield do not need to merge to collaborate effectively and learn from each other. Both districts belong to a supervisory union with a track record of continuous improvement, with strategic goals and programs committed to improving student performance for every student.

While there is the possibility of enhancing instructional opportunity through shared staffing, either through cooperative agreements or through the creation of additional district-wide instructional positions in special areas, all of this can be accomplished without changing existing district governance.

In addition, barring the wholesale restructuring of each district's elementary school program, there is no evidence yielding operational savings beyond those already being pursued at the SU level in terms of bulk purchasing, shared contracts/support services, etc. (*See report findings on operational efficiency).*

Key Obstacles to Merger 2: Projected Tax Impact of Unification

In addition, whether incentivized or not, the tax impact of a merger of a Hartland and Weathersfield merger , without operational savings would put unequal and unfair tax pressure on the citizens of Weathersfield.

Key Obstacles to Merger 3: Debt

Currently, Weathersfield would bring substantive debt to any merger. West Windsor's debt, while large, would remain with the town under special provisions outlined in Act 144.

District	Amount Outstanding 03/29/17	Annual Principal Payment	Pay off Date	Estimate 07/01/18 Balance
Weathersfield	**3,140,000**	**285,000**	**12/01/27**	**2,855,000**

Key Obstacles to Merger 4: Controlling Costs Through Tuition Designation:

One option for controlling tuition costs has always been designating which high school students could choose to attend. However, current law only allows a district to designate up to three schools. The geographic distance between schools, however, complicate any possibility of choosing to settle on just three schools, making this option more difficult to implement should a unified, two-town board wish to explore such a policy in the future. ***(See Appendix G)***

Key Obstacles to Merger 5: Geography, Transportation, Educational Programming, and Culture

Hartland and Weathersfield are non-contiguous towns, with town centers linked by Interstate 91 and other parts of the towns linked by a series of paved and dirt roads that travel through Windsor and West Windsor. In addition, the population of each town is fairly evening spread across the geographic breadth of both communities.

The distance via interstate 91 between Hartland and Weathersfield elementary schools is 11.5 miles, which takes 15 minutes by car or 20 minutes by direct bus. However, the distance between Hartland's northeastern border with Hartford to Weathersfield's southwestern border with Cavendish is 30 miles – a 46+ minute drive by car; longer by bus, particularly if one considers the challenge of creating bus routes that would transport students from their home to school. Currently, some students who live 10 minutes from school already face 45-minute bus rides to school.

Therefore, any attempt to achieve greater operational efficiency by restructuring or consolidating grade levels or core instructional programs would lead to prohibitively long bus rides for many students, as well as, incur the additional cost of transporting students long distances undercutting the very savings one was trying to achieve.

There may be some opportunities for sharing programs between schools on a limited basis, for example, special enrichment/shared activities during the school day. However, these programs would need to be limited in scope due to the loss of instructional time transporting students mid-day.

Central to the geography of WSE is the presence of Mount Ascutney, which was and remains a major factor in the development of the history and identity of each of the communities that make up the WSE. Geography is not simply a transportation but a cultural/historical issue. Non-contiguous towns, Weathersfield and Hartland have culturally evolved in relative isolation with little social contact between the towns..

We believe that creating a shared sense of citizen ownership and mutual cultural engagement in a unified district is essential to high functioning schools. We are committed to continue the work we have already started to foster opportunities that would create a deeper sense of regional identity and allow that sense of mutual ownership to evolve naturally. We believe that this goal is better achieved through purposeful leadership here in Windsor Southeast, not forced by state mandate.

Analysis 2: Windsor/West Windsor Merger

Introductory Financial Note:

Currently 47 West Windsor middle/high school students do not study at Windsor. Accounting for inflation, at roughly $20,000 per student/year, a merger between Windsor and West Windsor school districts could result in an overall (post-grandfathering) savings in tuition of ~$940,000 accumulated over six years. These monies could be used for program development in the new district.

A. Cost Benefit Analysis – West Windsor/Windsor Merger:

West Windsor

Opportunities

- Access to theater and tech programs
- Alignment of pk-12 assessment and feedback
- Input in budget and high school
- Maintain sense of community and citizen engagement
- Use extra money to keep student-teacher population down and add programming
- Don't have to expand/add facilities
- Proximity between schools
- Historical relationship between towns

Challenges

- Loss of school choice; loss of expanded high school programming in some tuition high schools due to loss of school choice.
- School population won't increase at Albert Bridge or at Windsor High, which will not make WHS more sustainable
- Longer commute for some

- Fear of ultimate school closure
- Fear of decline in property values due to loss of school choice
- Acceptance by public

Windsor

Challenges

- Potential tax rate increase
- Perceived loss of control may not sit well with community members

Opportunities

- Increased funding due to operational savings allows for programming enhancements that benefit all students
- Ascutney Outdoors Reservation – potential for outdoor/experiencial programs

West Windsor/Windsor Combined

Educational Opportunities

- SU-wide numbers - true cohort
- K-12 curriculum
- Follow progress of Albert Bridge students and be able to evaluate
- Collaboration between teachers reaching down into ABS
- Consistent grading
- Sports team cohesion
- Share specialized programming

Staffing/Operational Opportunities

- Redistricting, or intra-district choice as a means of dealing with uneven enrollments
- Absorb teachers on hold for class size (shift teachers around as needed)
- Could share staff for special programs
- Smooth out dips in population

Staffing/Operational Challenges

- Move teachers and/or students to optimize class sizes or share

B. West Windsor/Windsor Representation Options

Options:

- proportional
- at-large: board chosen by all towns
- hybrid: equal representation, but all members chosen by all voters in all towns
- weighted

Proportional Representation in a 2x2 between Windsor and West Windsor:

West Windsor 24% 3 or 2
Windsor 76% 9 or 6

Committee Recommendation:

Use a hybrid model to insure equal number of representatives from each community. The goal is to mitigate the concern of West Windsor losing its voice on a unified board.

C. Projected Homestead Tax Rates for Windsor/West Windsor Unified District:

Financial Note:

The financial projections that follow for the merger of West Windsor and Windsor as part of a 2x2 merger proposal involving the unification of Hartland and Weathersfield, represent a preferred structure under the law. As such, both mergers receive tax incentives. In addition, as a preferred merger structure under the law, West Windsor would maintain i's small schools grant.

The merger of West Windsor and Windsor as part of the final proposal developed by the Committee and adopted by each district board for an Alternative Structure for WSE is not a preferred merger and as a result does not receive tax incentives. Those financial projections are included later in this report.

Windsor West Windsor Merger: Incentivized Merger; 2% annual growth in Spending

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
West Windsor	1.9006	1.6916	1.6070	1.5267	1.4504	1.4782	1.5281
Windsor	1.3765	1.2936	1.3318	1.3800	1.4288	1.4782	1.5281
No Change							
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356
Windsor	1.3765	1.2936	1.3195	1.3459	1.3728	1.4002	1.4282

Summary approximate tax impact over 5 years on a $150,000 home (incentives only):

a. West Windsor: tax savings of $2,479 (~$496 savings/year)
b. Windsor: tax increase of $420 (~$84 increase/year)

Summary Findings – West Windsor/Windsor Merger

The committee found real educational, operational, and financial opportunities that would powerfully benefit the students in both communities in a merger between the Windsor and West Windsor school districts *(See Above).*

Among those benefits are:

- ✓ The projected redirection over 6 years of West Windsor tuition dollars, ~$940,000 currently going to other districts that can be used at home in support program and instructional improvements/innovations directly benefitting the children of Windsor and West Windsor.

- ✓ The opportunity for West Windsor 7th and 8th grade students to benefit from Windsor's current Design/Tech Education and Theater programs.

- ✓ Increased educational opportunity at Windsor Middle/High School due a larger cohort of students.

- ✓ New operational opportunities in a merged district to mitigate West Windsor's increasingly unsustainable rate of annual tax increases in support of its elementary school programs through shared staffing, etc.

- ✓ Given the geographic proximity of the Windsor and West Windsor elementary schools, a commitment by both communities to maintain a school in West Windsor.

- ✓ Equal representation and decision-making authority for both communities on a new unified school board.

- ✓ Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction.

Given these clear and substantive benefits, the Committee considers this merger, along with the strategic and operational recommendations for the management of our supervisory union, to be the cornerstone of our Committee's proposal for an Alternative Structure in Windsor Southeast

OPTION 3: 3X1 REGIONAL SCHOOL DISTRICT

WINDSOR AND HARTLAND/WEATHERSFIELD/WEST WINDSOR (PREFERRED MODEL)

Governance Description

A 3x1 Regional Educational District (R.E.D) as currently proposed by the legislature could result from the union of one PreK-12 operating district (Windsor) and three unified, similarly configured tuition operating districts:

- Option 1: Hartland, Weathersfield, and West Windsor form a Prek-8 operating district with high school choice where West Windsor votes to give up choice for its 7th and 8th graders.
- Option 2: Hartland, Weathersfield, and West Windsor form a Prek-6 unified tuition district (PreK-6) where Hartland and Weathersfield extend school choice to their 7th and 8th graders and become Prek-6 elementary schools.

Option 1 vs. Option 2 **- Opportunities and Challenges:**

Operational Savings:

Under **Option 1** of a 3x1 merger, West Windsor's participation in a merger with Hartland and Weathersfield would result in an overall savings after grandfathering current 7th and 8th grade students (2 years) of) ~$400,000 to $500,000. There are currently 20-25 students (current grades 5/6 students @ $20,000 per year) tuitioning at area Middle/High Schools. This money could be redirected over time for program development across the new district or for tax relief.

Option 1: Potential Tuition Savings due to Unification = ~$400,000 - $500,000

Option 2 provides no such operational savings and could require additional spending to cover increased tuition costs.

School Capacity:

Option 1:

Since the Albert Bridge School does not have the capacity to educate its current population of 7th and 8th grade students as a result of implementing Option 1, these students would need to attend either Hartland Elementary, Weathersfield Elementary, or both. Both schools have the capacity to educate West Windsor's 7th and 8th graders without significant (if any) additions to their instructional staff. This could be accomplished through two distinct policy options for the new unified district:

a. Assign Albert Bridge 7th and 8th graders to the elementary school geographically closest to the residence; or
b. Give all 7th and 8th grade students in the new district the option to choose which of the two elementary schools they would like to attend. A fully implemented policy would

need to be crafted to ensure a balance of students between the two schools and evaluate the cost of additional transportation to bus students to the school of their choice.

An important consideration under Option #1 is that 7th and 8th grade students from West Windsor would be required to attend three different schools during their elementary and high school years. It was noted, that while some families chose this option, most students attend a 7-12 school after completing their elementary education at Albert Bridge.

One potential mitigating opportunity that the Committee considered was the idea that 6th, 7th, and 8th graders from Albert Bridge attend newly designed middle school programs in both Hartland and Weathersfield, allowing students to really settle into their middle school experience. A related factor in considering this proposal is the future of PK programs in the State. Giving 6th graders a full middle school experience, might provide the necessary room to house a future full time PK program at Albert Bridge.

Option #2:

Under Option #2, both Hartland and Weathersfield would be required to end their 7th and 8th grade instructional programs and tuition their students neighboring schools.

The facilities in both schools were designed to handle many more students than their current school population. In the case of Hartland for example, tuitioning 7th and 8th graders would mean reducing their current student population by roughly 80 students, laying off teachers, and absorbing additional tuition expenses into the current school budget. The scenario is roughly the same for Weathersfield.

Findings on Option 1 vs. Option 2:

The conclusion of the Committee was that implementing option 2 made little educational or fiscal sense. While Option 1 would result in the loss of 7th and 8th grade choice, representatives from West Windsor indicated that community members might consider such an option, particularly if it meant maintaining high school choice.

Overall 3x1 Merger Opportunities:

Regardless of which tuitioning option is adopted by the new district, a merger between the school districts of Hartland, Weathersfield, and West Windsor would create new opportunities to:

- Come to an agreement on teacher prep time thereby evening out the current instructional time devoted to allied arts programs.
- Work towards a core set of instructional opportunities and approaches based on the current range of instructional innovation currently going on in each school.

- Build on a solid record of performance outcomes reflected in each school and to analyze why certain grade levels and instructional programs might be leading to better results through additional teacher conferencing and collaboration across schools.
- Explore new possibilities for free and reduced lunches based. Averaged together, it might bump the new district over the threshold, allowing for more services.
- To address existing differences in staffing ratios by sharing some staff or in the case of Option 1, use the saved tuition dollars to equalize instructional ratios. In addition, unification also created opportunities to address this issue through some adjustments in school attendance boundaries or creating voluntary opportunities for parents to choose to send their children to another school in the district when there are enrollment fluctuations, thereby evening out these inevitable variations in class size.

Obstacles to Merger - 3x1 Merger:

A. Closing West Windsor Elementary School

After examining the enrollment trends at all three schools, the representatives on the Committee from Hartland and Weathersfield concluded that both schools – individually and collectively – had the capacity to serve the current elementary population in West Windsor. Closing Albert Bridge and allowing West Windsor elementary students to attend the school to which they were geographically closest seemed to be the best way to ensure equal educational opportunity for all students at a cost that taxpayers would value. This was a difficult position to take but one that made educational and operational sense according to the numbers. It proved understandable to everyone that this was not something that the citizens of West Windsor were willing to commit to for a whole host of reasons. As result, this proved to be the major barrier to pursuing a three-way merger.

B. Controlling Costs through Tuition Designation

One option for controlling tuition costs has always been designating which high school students could choose to attend. However, current law only allows a district to designate up to three schools. The geographic distance between the schools complicate any possibility of just three schools, making this unified option more difficult to implement should a unified town board wish to explore such a policy in the future. ***(See Appendix ?)***

C. Board Representation in a unified 3X1 Elementary District:

The Committee examined four legally acceptable ways to allocate community representation on a unified school board;

- Proportional
- Weighted
- At-large
- Hybrid

If representation was **proportional**, the new board configuration could look as follows depending on the size of the board:

2010 Decennial Population by Community:

Hartland	3393	46%	6	6	5	4	3
Weathersfield	2825	39%	5	5	4	3	2
West Windsor	1099	15%	3	2	2	1	1
Total	**7317**	**Board Size:**	**14**	**13**	**11**	**8**	**6**

If board representation was **weighted**, the board could have an even number of members elected locally by each community, but voting power would be set proportionally to reflect the percentages noted above.

In an **at-large model**, the size of the board could be set and representatives would run for those seats across the entire unified district and be elected by the co-mingled vote of all three communities.

In a **hybrid model,** each community would have a predetermined slate of candidates representing each community, but election to those seats across the entire unified district would be elected by co-mingled vote of all three communities. The number of representatives representing each community could be equal.

The Committee could find no common ground for anything but the default option for proportional representation which was unacceptable to the community of West Windsor, particularly given the stated conclusion by the representatives from Hartland Weathersfield that closing Albert Bridge was probably the best means for achieving better educational outcomes for all students at a cost point that taxpayers would value.

D. Projected Tax Rates for a 3x1 Merger:

Hartland/Weathersfield/West Windsor Merger: Incentivized Merger; 2% annual growth in Spending.

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5697	1.6227	1.6764	1.7307	1.7857
Weathersfield	1.5799	1.5544	1.5697	1.6227	1.6764	1.7307	1.7857
West Windsor	1.9006	1.6916	1.6070	1.6227	1.6764	1.7307	1.7857
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (incentives only):

a. Hartland: Tax savings of $461 (~$92 decrease/year)
b. Weathersfield: Tax increase of $201 (~$40 increase/year)
c. West Windsor: Tax savings of $1,231 (~$246 decrease/year)

As the projections reveal, the tax impact of a 3x1 merger benefit taxpayers unequally providing some with tax savings and others with tax increases absent the closing of Albert Bridge and the application of operational savings towards reducing taxes.

E. Debt:

Currently, Weathersfield would bring substantial debt to a three-way merger.

Note: West Windsor's debt would remain with the town under special provisions outlined in Act 144.

District	Amount Outstanding 03/29/17	Annual Principal Payment	Pay off Date	Estimate 07/01/18 Balance
Weathersfield	3,140,000	285,000	12/01/27	2,855,000
West Windsor	595,000	80,000	11/15/25	515,000

Summary Finding: 3x1 Merger Hartland/Weathersfield/West Windsor

The Committee believes that there is no compelling evidence to suggest that a merger between Hartland, Weathersfield, and West Windsor would lead to any tangible improvements in educational opportunity, student performance, or operational efficiency without the closing of the Albert Bridge School. This fact, along with the unequal impact of a three-way merger on projected tax rates, represent very real obstacles to merging three school districts with a history of solid academic and instructional achievement. Nor is it an outcome that reflects the will of the citizens that we represent.

The Committee arrives at this conclusion mindfully and with an open recognition that, should circumstances change in the future, additional alternatives would be considered in order to ensure that students in our three communities continue to receive the best education possible.

ALTERNATIVE STRUCTURE PROPOSAL – BEST MEANS

A. BEST MEANS ARGUMENT #1 - MAINTAIN WINDSOR SOUTHEAST'S EXISTING SUPERVISORY UNION STRUCTURE

Introduction:

In addition to addressing the goals of Act 46, Alternative Plans must address the following requirements:

A supervisory union composed of multiple member districts, each with its separate school board, can meet the State's [education] goals, *particularly* if:

1. The member districts **consider themselves to be collectively responsible** for the education of all PreK-12 students residing in the supervisory union;
2. The SU operates in a manner that maximizes efficiencies through economies of scale and the flexible management, transfer, and **sharing of nonfinancial-resources** among member districts;
3. The S. has the **smallest number of member school districts** practicable, and
4. The combined average daily membership of all member districts is not less than 1,100.
5. A Preferred Structure is **not possible/practicable or not the best model**; The alternative proposal is the best means.

Current Practice:

In considering the requirements for Alternative Plans, Windsor Southeast points to a strong history of mutual cooperation and planning that has routinely taken place through the district's supervisory union board structure. While each district board serves a different continuum of students PreK-12, Windsor Southeast has worked to unify its educational programs, particularly at the elementary level to insure a smooth transition to high school for students throughout the SU. To that end, the district has policies and procedures in place across the supervisory union that have created and continue to deliver ongoing support for:

a. Strong unified governance at the Supervisory Union level – three members of each local district board sit on the Supervisory Union board, ensuring clear communication and policy-making authority;
b. Working toward a common curriculum, PreK-8 and access to all relevant curricular material;
c. Collective in-service training to support the delivery of the district's core curriculum and ensure uniform implementation of instructional best-practices;
d. District-wide social/emotional program and delivery models (including collaborative problem solving through PBIS and MTSS)

e. Special Education including moving to a "billing" approach based on equalized pupil counts rather than actual use, sheltering small districts in the SU from major cost fluctuations due to abrupt changes in special education populations.
f. A combined food service contract including district-wide farm-to-school food programs;
g. Shared tech support and data access provided by central office;
h. A shared server providing internet access and a supervisory union web presence and design;
i. A unified collective bargaining agreement that covers all issues except issues related to work during the school day (teacher prep and planning time still not equitable and in the process of being negotiated);
j. A district-wide program of mentoring and teacher orientation;
k. A unified teacher evaluation system;
l. Universal Pre-School;
m. District-wide environmental/nature educational programs/opportunities.
n. Shared business, maintenance, purchasing, and transportation services.
o. District-wide Wellness Team (students and teachers)

Finally, all the districts that make the Windsor Southeast Supervisory Union have worked together to create a **Strategic Plan (2014-2019)** *(See Appendix F)* for the entire supervisory union supported by individual district/building plans to complement and support district-wide initiatives. These plans are at once comprehensive and transparent, and deal with all the myriad challenges facing the current SU – evolving student needs, curriculum development, teacher support, instructional development, facility and capital needs, special education, operational effectiveness, etc.

The core educational and operation strategies/goals identified in 2014 included:

- Strategy 1 – Vision for Leading the Focus on Climate, Teaching and Learning
- Strategy 2 – Ensuring Equity and Adequacy of Fiscal and Human Resources
- Strategy 3 – Engaging Families and the Community
- Strategy 4 – Ensuring Accountability for Results

Alternative Structure – Continuous Improvement Plan

Building upon the WSE Strategic Plan, our continuous improvement plan to meet additional goals specific to Act 46 begins with a set of recommendations for strengthening and expanding strategic leadership at the supervisory union level.

Meeting the Goals of Act 46 - Creating a Stronger Union:

After a thorough study of the governance practices that shape the operation, leadership, and educational effectiveness of the Windsor Southeast Supervisory Union, the Committee proposes that the Union undertake a number of additional structural reforms to better address not only the goals of Act 46 but the educational and strategic needs of the current supervisory union.

Strategic Goal: Within the bounds of existing law, maximize the role that the current supervisory union board strategically plays in setting, implementing, and assessing district policy and educational operations.

This would be achieved by

A. Exploring a Supervisory Union Board Structure where all members of local district boards are also members of the SU board. This would eliminate redundancy in representation and allow district matters to be fully vetted and decided up without multiple meetings and policy discussions.

Or

B. Having all local board members attend SU meetings keeping local representation as it is. Votes on SU business would proceed according to current representational structure.

Local boards would retain their fiduciary responsibility over matters of budget, financing, hiring, and so on, but the governance goal would be to strengthen the capacity of district boards to act in concert to achieve the educational, strategic, and operational goals of the whole SU. For example, while each district would need to approve its own budget, consistent with the needs and resources of that district, a budget process could also begin at the "top" - at the SU level, where each district could be more consistently aware of the educational needs of the other districts and the profile of resources each intends to apply towards agreed upon district goals. If nothing else, the current 706 study process has demonstrated the importance of all districts having access to and fully reviewing the instructional opportunities across our schools as well as the performance data of every student/school in the district. That full perspective is essential to establishing and implementing innovative strategies district-wide to address our students collective and particular needs.

Placing greater emphasis on the Supervisory Union Board for unified policy and strategic planning would enable the Superintendent and his/her administrative team to devote more time and energy to collaborative governance versus wasting valuable leadership orchestrating multiple local initiatives that require redundant planning and decision-making processes. In truth,

all this would take is a mutual commitment by each local board to think and act "globally" not just "locally" through an enhanced Supervisory Union board leadership structure – a strategic predisposition that the Committee believes already exists in Windsor Southeast.

In terms of educational planning, this would mean:

I. All local educational initiatives would be presented and vetted at an SU level balancing each local school's freedom to innovate and explore new instructional/student support programs with transparency and a district-wide capacity to assess the effectiveness of each initiative and allow for strategic choices of innovations based on demonstrated promise before rolling them out across the entire SU.

II. A common approach to assessing student performance and addressing the particular needs of students and schools. Working collaboratively would also create district-wide transparency over issues of student performance, instructional opportunity, and teacher support, enabling local citizens to better assess the budgetary recommendations of local boards. It would also encourage parents, citizens, and taxpayers to view their local school from a regional perspective.

III. In addition, since not every school in the SU. has the same profile of needs and/or challenges, vetting budgets through a district-wide process would create more awareness over differences in staffing and program needs throughout the district, and bring to the surface, when and where necessary, inequitable differences in program opportunities being afforded students in Windsor Southeast.

IV. It would also create a new transparent forum for local boards to vet and justify their budgetary priorities against the strategic goals approved for the entire union.

In terms of strengthening student performance and ensuring equality of educational opportunity, this would mean:

I. Annual reviews of student performance, PreK-12, enabled by a single process for reporting the academic performance of high school students, planned and initiated through the superintendent's office in order to:

   a. Provide transparent data on student growth and achievement after grade 8.
   b. Develop strategies and programs for better preparing Windsor Southeast students to matriculate into high school.
   c. Provide parents with a more transparent and fair assessment of the overall quality of the education students receive at a particular high school.

II. Annual reviews of program offerings and program effectiveness across all the schools in the district as a prelude to the budgeting process to assess the equity of access to quality instruction both in school and after school.

III. Opening up access to after school programs across the schools, particularly when there are not enough students to host a particular activity – e.g. shared drama programs, athletic teams, musical groups. This would also entail working together to establish equitable transportation solutions that would enable students to access these shared opportunities.

IV. Coordinating some district-wide celebrations of student performance; creating showcase opportunities for the district's best musicians, singers, and athletes to come together to share their talents and work/compete with one another.

In terms of building and district leadership, this would mean:

I. Creating a district-wide hiring process where the entire administrative team from Superintendent to building principal, were recruited, vetted, and hired by a collaborative process involving key stake-holders across the SU, particularly the superintendent. Local building contracts would still apply but the process would aim to find not simply a leader for a specific school, but ensure a hire who can be an integral member of a district-wide collaborative leadership team.

Operationally, this would mean

I. Creating a unified budgeting process that could better maximize efficiencies and coordinate the sharing of non-financial resources like teacher leadership, teacher planning teams, performance data assessment, curriculum planning and development, school-community partnerships, grant procurement, facilities, musical instrument programs, and so on. It would allow for more centralized bulk purchasing that could be "billed back" to individual districts within the budget lines set by their local budgets.

In terms of school identity and local involvement, this would mean:

I. The creation of additional, fully-warned Supervisory Union meeting to address the strategic, educational, and operational needs of the entire SU where stakeholders across the district would have input on the development of educational policy and programming.

While at the same time maintaining,

II. Local board meetings where principals and teachers can report to their local boards and parents, students, and citizens can engage in strategic discussions about the progress and needs of their students – ensuring that a local perspective informs district-wide decision-making.

B. BEST MEANS ARGUMENT #2 – A VOLUNTARY MERGER BETWEEN WINDSOR AND WEST WINDSOR

Summary Findings – West Windsor/Windsor Merge:

The committee found real educational, operational, and financial opportunities that would powerfully benefit the students in both communities in a merger between the Windsor and West Windsor school districts *(See Above).*

Among those benefits are:

- ✓ The projected redirection over 6 years of West Windsor tuition dollars, ~$940,000 currently going to other districts that can be used at home in support program and instructional improvements/innovations directly benefitting the children of Windsor and West Windsor.

- ✓ The opportunity for West Windsor 7th and 8th grade students to benefit from Windsor's current Design/Tech Education and Theater programs.

- ✓ Increased educational opportunity at Windsor Middle/High School due a larger cohort of students.

- ✓ New operational opportunities in a merged district to mitigate West Windsor's increasingly unsustainable rate of annual tax increases in support of its elementary school programs.

- ✓ Given the geographic proximity of the Windsor and West Windsor elementary schools, a commitment by both communities to maintain a school in West Windsor.

- ✓ Equal representation and decision-making authority for both communities on a new unified school board.

- ✓ Projected/unified tax rates that reduce the tax burden on West Windsor citizens without substantive increases for Windsor residents, particularly if the new board is able to find and apply additional operational savings due to merging core operations (outside of identified tuition savings) towards tax reduction.

Given these clear and substantive benefits, the Committee considers this merger, along with the strategic and operational recommendations for the management of our supervisory union, to be the cornerstone of our Committee's proposal for an Alternative Structure in Windsor Southeast

Financial Projections: of Homestead Tax Rate

Windsor and West/Windsor - <u>Non-Incentivized Merger</u> as part of an Alternative Structure:

Introduction:

Due to the fact that this merger would not be supported by tax incentives, the projected financial impact of such a merger is outlined below using the same model used for projecting the tax impact of merging districts, but without incentives.

***A**s noted throughout this report, a merger between Windsor and West Windsor, is projected to result ~$940,000 over six years of tuition dollars that would be redirected for program development in the new unified district.*

The model assumes the loss of West Windsor's small schools grant as this merger is not a preferred or incentivized merger under the law. This assumption, however, awaits a final determination by the State Board.

Equalized Homestead Tax Rates: Required Merger, No Incentives, 2% Annual Growth in Spending

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
West Windsor	1.9006	1.6916	1.3456	1.4229	1.4874	1.5532	1.6204
Windsor	1.3765	1.2936	1.3456	1.4229	1.4874	1.5532	1.6204
No Change							
West Windsor	1.9006	1.6916	1.7424	1.8587	1.9144	1.9719	2.0310
Windsor	1.3765	1.2936	1.3324	1.3724	1.4136	1.4560	1.4996

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (no incentives):

a. West Windsor: tax savings of $3,055 (~$611 decrease /year)
b. Windsor: tax increase of $510 (~$102 increase/year)

SUMMARY ARGUMENTS/CONTINUOUS IMPROVEMENT PLAN

The central assertion behind the committee's alternative proposal for WSE is that the way forward to improved governance and educational leadership in our region is the middle path between full unification and the status quo. Achieving the goals of Act 46 in WSE means creating a highly effective SU structure defined by high levels of strategic planning and operational coordination at the Supervisory Union level, supported by committed and focused community leadership by district boards working closely with their local communities for the common benefit of all children. Our study committee and boards are wholeheartedly supportive of merging where it clearly benefits students and communities (as in the case of West Windsor and Windsor), but mindfully oppose merging district governance structures when the educational rationale for such a step is unsubstantiated or arbitrary.

We would argue that a **supervisory union structure** can, when effectively implemented in the right context (particularly between districts with a shared strategic vision and history of operational cooperation), provide our students and communities with educational programs aimed at achieving educational excellence in a fiscally responsible manner. Our SU structure in WSE has already enabled our districts to develop a comprehensive vision of our shared future while allowing each of us to work individually, but in concert to realize our future. Such an approach encourages and supports one district to develop innovative programs and work out policies that can be scaled to the whole supervisory union for the benefit of all.

With this strategic relationship at the heart of our supervisory union governance structure, WSE commits itself, among the recommendations already made throughout this self-study, to maintain and or strengthen:

- The union's annual evaluation of performance data, program offerings, program effectiveness, and core instructional strategies with the goal of setting and/or revising SU goals and implementation plans.
- The coordination and implementation of uniform best practices in personal learning plans, proficiency based learning strategies, proficiency based report cards, and flexible pathways (Act 77).
- The coordination of professional development activities across the SU in support of local and WSE initiatives.
- District leadership through a more uniform/inclusive hiring process at all levels
- Building SU leadership through a clearly defined process of setting short and long-term goals of for educational/instructional improvement, as well as reporting mechanisms and SU-wide sharing of district initiatives and progress.
- A unified budget process by coordinating line items and billed backs to individual schools on shared services and contracts
- Community engagement through a fully warned calendar of SU meeting to address the strategic, education, and operational needs of the SU, as well as the creation of new opportunities for communities to come together to celebrate student achievement and build a greater sense of regional identity.

SU Governance Structure for Proposed Alternative Governance Structure:

Along with this proposal is a formal request by the current WSE Supervisory Union Board to change the current model of district representation on the new SU board, should the State Board approve WSE's Proposal for an Alternative Governance Structure and the proposed merger between Windsor and West Windsor be approved by the State Board and the citizens of both communities.

The SU board proposes that in a new Supervisory Union structure made up of three district boards (e.g. Hartland, Weathersfield, and West Windsor/Windsor), that the current equality of representation by community be continued in the new SU structure; specifically that is:

Hartland – 3 District Representatives
Weathersfield – 3 District Representatives
West Windsor/Windsor – 6 District Representatives

Attached is this report ***(Appendix H)*** is a formal letter from the current WSE SU Board making this request of the State Board for an alternative representational structure as per Title 16, Chapter 007; section 261.

ARTICLES OF AGREEMENT – WEST WINDSOR/WINDSOR UNIFIED UNION SCHOOL DISTRICT

The Windsor Southeast Act 46 Study Committee recommends the following Articles of Agreement by each necessary school district for the creation of a Pre-Kindergarten through grade 12 unified union school district to be provisionally named the Windsor/West Windsor Unified Union School District. ***(See Article 19.)***

Article 1. Necessary Forming School Districts

The School Districts of Windsor and West Windsor are named necessary for the establishment of the provisionally named Windsor/West Windsor Unified Union School District. The above referenced school districts, if they vote to approve the proposal, are hereinafter referred to as the "forming districts".

Article 2. Effect of Vote/Creation of New District

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

Article 3. Grades to Operate

The Windsor/West Windsor Unified Union School District shall operate grades Pre-Kindergarten through grade 12.

West Windsor students enrolled and attending an approved public or independent middle school (7-8), high school ((9-12), or middle school/high school (grades 7-12) during the 2018-2019 school year as tuitioned students at the expense of the West Windsor School District shall be "grandfathered" under the provisions of this article. In addition, 6th graders who graduate from West Windsor during the 2018-2019 school year shall also be grandfathered under this agreement. Grandfathered students, under the definitions of this article, shall be permitted the option to continue to attend the school of their choice in accordance with Vermont statutes as tuitioned students from the Windsor/West Windsor Unified Union School District until they graduate from an approved public or independent high school.

Article 4. Proposed New School Construction

No new schools or renovations are proposed at this time.

Article 5. Plan for First Year of Operation

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

The board will comply with the 16 VSA Chapter 53, subchapter 3, regarding recognition of the representatives of employees of the respective forming districts as the representatives of the employees of the union school district and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees. In the absence of new collective bargaining agreements on July 1, 2019, the Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, subchapter 3. The Board shall honor all individual employment contracts that are in place in the forming districts on June 30, 2019 until their respective termination dates.

Article 6. Special Funds and Indebtedness of Member Districts

A. Capital Debt

The Windsor/West Windsor Unified Union School District shall assume all capital debt as may exist on June 30, 2019, including both principal and interest, of the forming school districts that joined the new union district.

Debt service on capital debt of the West Windsor Town School to be assumed by the Windsor/West Windsor Unified Union School District shall continue to be paid by the Town of West Windsor in the manner provided in the March 4, 2003 vote of the West Windsor Town School District.

B. Operating Fund Surpluses, Deficits and Reserve Funds

The Windsor/West Windsor Unified Union School District shall assume any and all operating deficits, surpluses, and fund balances of the forming districts that may exist on the close of business on June 30, 2019. In addition, reserve funds identified for specific purposes will be transferred to the Windsor/West Windsor Unified Union School District and will be utilized by the new unified district in accordance with their original established purposes unless otherwise determined through appropriate legal procedures.

C. Restricted Funds:

The forming school districts will transfer to the Windsor/West Windsor Unified Union School District any preexisting specific endowments, scholarships, or other restricted accounts, including student activity and related accounts, held by school districts that may exist on June 30, 2019. Scholarship accounts or similar accounts, held by the forming

districts prior to June 30, 2019, that have specified conditions of use will be used in accordance with said provisions.

Article 7. Real and Personal Property

A. Transfer of Property to the Unified District:

No later than June 30, 2019, the forming districts will convey to the Windsor/West Windsor Unified Union School District for the sum of one dollar, and subject to the encumbrances of record, all their school-related real and personal property, including all land, buildings, and content.

B. Subsequent Sale of Real Property to Towns:

In the event that, and at such subsequent time as, the Windsor/West Windsor Unified Union School District Board of Directors determines, in its discretion, that continued possession of the real property, including land and buildings, conveyed to it by one or more of the forming districts will not be used in direct delivery of student educational programs, the Windsor/West Windsor Unified Union School District shall offer for sale such real property to the town in which such real property is located, for the sum of one dollar, subject to all encumbrances of record, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants required by Vermont law, in addition to costs of capital improvements subsequent to July 1, 2019. The town shall have up to one year to exercise its option to purchase said property for one dollar. For purposes of this Article, the school related real property conveyed by the Windsor Town School District to the Windsor/West Windsor Unified Union School District is an indivisible parcel of land and building(s) used for prek-12 purposes. As such, this paragraph B regarding Subsequent Sale of Real Property shall not be effective unless the entire indivisible parcel of Windsor land or buildings will not be used in direct delivery of student educational programs.

The conveyance of any of the above school properties back to the town in which the property is located, except in the case of any undeveloped land originally conveyed to the new unified district by a forming district, shall be conditioned upon the town owning and using the real property for community and public purposes for minimum of five years, In the event the town elects to sell the real property prior to five years of ownership, the town shall compensate the Unified District for all capital improvements and renovations completed after the formation of the Unified District prior to the sale to the town. In the event a town elects not to acquire ownership of such real property, the Unified District shall, pursuant to Vermont statutes, sell the property upon such terms and conditions as established by the Windsor/West Windsor Unified Union School District Board of School Directors.

Article 8. Board of School Directors Representation

A forming town district's representation on the Union School District Board of School Directors will be determined as an at-large "hybrid model". Membership on the Windsor/West Windsor Union School District Board is apportioned to each town. Apportionment does not have to be proportional to the town's population. Voters in member towns vote on the same slate of candidates. The ballot is categorized to represent each town's apportioned seats on the Union School District Board of School Directors and the candidates running for those positions.

At no time will a town/village corresponding to a pre-existing member school district have less than one board member with a single vote of one on the board of school directors.

The initial membership on the six (6) member Union School District Board of School Directors will be as follows:

Windsor:	3 members
West Windsor:	3 Members

Article 9: Initial Directors Terms of Office

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

	Term Ending March 2019	**Term Ending March 2020**	**Term ending March 2021**
West Windsor	**1**	**1**	**1**
Windsor	**1**	**1**	**1**

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

Pursuant to the provisions of 16 V.S.A. §706j(b), directors initially elected to the new district shall be sworn in and assume the duties of their office. The term of office for any school directors elected at the March 6, 2018 election shall be one, two, or three years respectively, less any time between March 6, 2018 and the Organizational Meeting of the Unified District (16 V.S.A. §706j), when the initial school directors will begin their term of office.

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

Article 10. Submission to Voters

The proposal forming the Windsor/West Windsor Unified Union School District will be duly warned and presented to the voters of each town school district on March 6, 2018

The vote shall take place in each of the school districts by Australian ballot. The merger must be approved separately by each community.

Article 11. Commencement of Operations

Upon an affirmative vote of the electorates of the forming districts and upon compliance with 16 VSA – 706g, the Windsor/West Windsor Unified Union School District shall have and exercise all the authority which is necessary in for it to prepare for full educational operations beginning on July 1, 2019. The Windsor/West Windsor Unified Union School District shall, between the date of its organizational meeting under 16 VSA – 706j and June 30, 2019, undertake planning and related duties necessary to begin operations of the new unified union school district on July 1, 2019, including preparing for and negotiating contractual agreements, preparing and presenting the budget for fiscal year 2020, preparing for the Windsor/West Windsor Unified Union School District annual meeting, and transacting any other lawful business that comes before the Board, provided however, that the exercise of such authority by the Windsor/West Windsor Unified Union School District shall not be construed to limit or alter the authority and/or responsibilities of the school districts that will form the new unified union school district and that will remain in existence during the transition period for the purpose of completing any business not given to the Windsor/West Windsor Unified Union School District.

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

Article 12. Australian Ballot Voting

The Windsor/West Windsor Unified Union School District shall elect its officers, vote the annual school district budget, and decide public questions by Australian ballot. In Australian ballot voting, the ballots shall be commingled.

Article 13. Provision for Closure of a School

The New Unified Union District Board may not close any school conveyed to the unified union school district by a Forming District within the first four (4) years of operation of the New Unified Union District without the consent of the electorate of that town.

After four (4) years of operation, the New Unified Union District may close a school conveyed to the New Unified Union District by a Forming District upon an affirmative vote of 2/3 of the full board of the New Unified Union Board of Directors.

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

Among the triggers for initiating a discussion, the new unified board should pay particular attention to educational quality and the viability/sustainability of the district's existing schools. As in any other major operational decision by a school board – the approval of a bond, the construction of a new school - the closure of a school shall be effective only if approved by a majority of the electorate of the new unified district voting at a special vote warned for this purpose.

Article 14. Intra-District Elementary School Choice

Before July 1, 2020, the Board of School Directors shall develop policies for offering intra-district choice (PreK-6) to the families or guardians of students matriculating in grades for which the Unified District operates multiple buildings as soon as practicable.

Policies respecting choice shall consider issues including, but not limited to, transportation, socio-economic equity, proximity to the selected building, unity of siblings, and the capacities of receiving schools and sending schools.

Article 15. Community Input Policies

The new unified board shall ensure ongoing opportunities for local input on policy and budget development. Structures to support and encourage public participation within the Windsor/West Windsor Unified Union School District will be established by the Board on or before July 1, 2019.

Article 16. Curriculum Development/Place Based Learning/Mountain Curriculum

The new unified board shall in conjunction with the supervisory union board, support curriculum and instructional planning to build on existing initiatives to:

a. Coordinate instructional programs at the elementary level, to maximize student access across the new unified district to the diverse range of instructional programs currently being offered at the Windsor and Albert Bridge elementary schools;
b. Develop and integrate innovative instructional programs that foster comprehensive, placed-based, experiential learning opportunities (PreK-12) designed to make maximum use of the resources – cultural, entrepreneurial, and environmental (e.g., Mount Ascutney and the Connecticut River Valley) – of the surrounding communities.

Article 17. Tuition Savings and Program Development

Given the expressed desire of voters to strengthen the new unified district's instructional programs (PreK-12) through their vote to unify their two school districts, the Windsor/West Windsor unified union Board of School Directors is charged to re-invest, for the purposes of program and instructional enhancement, future operational savings due to the reduction of budgeted tuition expenses as grand-fathered West Windsor tuition students graduate from high school over the next six years.

Article 18. Renaming the New District

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

APPENDICES

APPENDIX A: WSE UNIFIED UNION – SUPPORTING DOCUMENTS

Proposed Mission and Curriculum {Mountain Academy}

"The mission of the Mountain Academy is to be a learning community that meets the intellectual, social, and emotional needs of each student. Our school provides a ***challenging curriculum*** *and opportunities that promote creativity, provide* **personalized learning** *experiences, raise students'* **global awareness**, *and ensure each student reaches his or her potential. Our program cultivates collaboration among staff, students, parents, and the community. Finally, the Mountain Academy is committed to supporting* **community-based experiential learning** *opportunities that utilize the cultural heritage of all our communities and the* **richness of the natural environment**."

Content Area	9th Grade	10th Grade
English	English 9; Writing, Literary Studies	American Literature
Social Studies	Civitas; Governance, World Civilizations and Historical Analysis/Argument	US History 1877-Present
Math	Algebra 1 (or) Geometry	Geometry (or) Algebra II
Science*	Biology	Earth/Environmental Studies
Arts	Band, Chorus (Year Long)	Band, Chorus (Year Long)
	Introduction to Theater I Dance	Theater II, Dance
	Fundamentals of Art and Design I	Fundamentals of Art and Design II
Physical Education / other	Physical Education (and) Health	Physical Education (and) Health
Language/Communication	Level 1 (or) Level 2 French, Spanish (or) Other	Level 1, Level 2 (or) Level 3 French, Spanish (or) Other
Computer Science	Computer Engineering	Computer Engineering

Core courses offered in grades 9 and 10 are required course that meet the requirements of the Vermont Education Quality Standards, and provide necessary fundamental/prerequisite skills for upper level learning pathways

MOUNTAIN ACADEMY LEARNING PATHWAYS

Learning Pathways	*11th Grade Courses*	*12th Grade Courses*	**Sample Courses:** Theater Design; Acting; Stage Craft; Dance; Chorography; Creative Writing; Music Theory; Instrumental Study; Directing; History of Theater, Dance, Music; Recording/Engineering; Sound Design.
Creative Expression A. Performing Arts	**Description:** The Creative Expression: Performing Arts Pathway option is intended for students who want to focus on careers where non-visual aspects of expression are emphasized. Students in this pathway would be prepared for further study in performing arts and in the careers related to production and community engagement in the arts.		
	Career Links: Actor/Actress, Theater Technician, Dancer, musician, arts teacher, music or dance therapy, audio engineer, DJ, producer, theater manager, music marketing, corporate ensemble engagement specialist, museum docents, non-profit arts management, public relations, representation (agents), creative projects consultant, project manager, musical director, pit orchestra musician, accompanist, conductor, orchestra management, choir director, church organist, private studio.		
Creative Expression B. Visual Arts	**Descriptions:** The Creative Expression: Visual Arts Pathway option is intended for students interested in careers focused on the visual aspects of creating. Students in this pathway would be prepared for further study visual and media arts fields, and in the careers related to production and community engagement in the arts.		**Sample Courses:** Drawing, Painting, Photography, Metal-Smithing; Pottery; Sculpture; Electronic Media
	Career Links: Illustrator, Photographer, Sculpter, Consumer Crafts, product design, media artist, visual artist, museum docent, non-profit arts management, public relations, creative projects consultant, gallery management, marketing and advertising, project manager, tattoo artist, makeup/effects artist, fashion stylist, culinary arts, organizational specialist, interior designer, website designer, game designer.		

Learning Pathways	*11th Grade Courses*	*12th Grade Courses*	**Sample Courses:**
Engineering & Creative Design	**Descriptions:** The Engineering and Creative Design Pathway option is intended for students interested in careers focused on engineering, design, and manufacturing. Students in this pathway would be prepared for further study in an applied math or science program, and in the careers related to engineering.		Graphic Design, Media arts, Architecture, Robotics, 3D design, Algebra II, Trigonometry, MIT High School Project, Internships (American Precision, Hartland Tools, Hypotherm), HACTC, Independent English, Research and Technical Writing, Infinity Project
	Career Links: Mechanical Engineer, Civil Engineer, Software Engineer, Design Engineer, Aerospace Engineer, Computer Engineer, Urban Planner, Architect, Product Designer, Manufacturing, Construction Manager, Project Manager		
Environmental Studies	**Description:** The Environmental Studies Pathway option is intended for students interested in careers focused in helping the environment, either through a scientific, educational or law and policy approach. Students in this pathway would be prepared for further study in a science or political science field, and in the careers related to those respective courses of study.		**Sample Courses:** Environmental Literacy, Physical Science, Stanford Earth Young Investigators Program-Online,, Independent, and/or school based environmental, sustainability project, Independent exploration of local resources, Internships, Work Study
	Career Links: Environmental Scientist, Earth Sciences, Outdoor Advocacy, Energy Technology/Exploration, Environmental Policy Analyst, Wildlife Manager, Zoologist, Oceanographer, Meteorologist, Environmental Lawyer, Natural Resources Manager, Fish & Game Warden, Sustainability Specialist, Geographic Information Systems Technician, Community or Urban Planner, Conservation Scientist,		

Learning Pathways	*11th Grade Courses*	*12th Grade Courses*	**Sample Courses:** Research Writing, Anatomy & Physiology, Chemistry, Psychology, Internship at Medical Center, Nursing Home, Rehabilitation Center, English and Science Independent Studies, Trigonometry, Calculus, Statistics, Online College Course, CCV, CSC, Rise Internship Practicum Boston University, UVM Health & Medical Summer Academy
Research Sciences	**Description:** The Research Sciences Pathway option is intended for students interested in careers focused around scientific research, medical professions, or other careers associated with an advanced degree in a science field. Students in this pathway would be prepared for further study in chemistry, biology, physics or other related courses of study that this pathway would provide a solid foundation for.		
	Career Links: Nurse, Doctor, Dentist, Veterinarian, Emergency Services, Speech Pathologist, Medical Writer, Occupational Therapist, Occupational Health and Safety Specialist, Radiation Therapist, Physical Therapist, Biomedical Engineer, Astrophysicist, Medical/Health Services Manager, Health Information Manager, Healthcare Administrator, Public Health Administrator, Pharmacist, Diagnostic Medical Sonographer, Dietician, Nutritionist, Physician Assistant, Respiratory Therapist, MRI Technologist, Genetic Counselor, Chiropractor, Addiction & Rehabilitation Counselor		
Human Development & Social Services	**Description:** The Human Development and Social Services Pathway option is intended for students interested in careers focused on working with people in fields such as counseling, human resources and teaching. Students in this pathway would be prepared for further study in programs such as psychology, social work, management, and education.		**Sample Courses:** Psychology, Sociology, Human Development, Statistics, Social Services Internships, Teaching placements, English elective related to Culture/Genders/ Race Issues, Contemporary Problems, Ind. Study
	Career Links: Occupational Therapist, Psychologist, Social Work, Guidance Counselor, Marriage & Family Counselor, Mental Health Counselor, Rehabilitation Counselor, Educator, Child Care Worker, Human Resources Manager, Public Health Administrator, Crisis Center Worker, Human Services Case Manager, Child Services Case Manager, Substance Abuse Counselor, Speech Therapist		

Learning Pathways	*11th Grade Courses*	*12th Grade Courses*	**Sample Courses:** Ethics; Organizational Theory; Biography**;** World History; Systems Theory; Psychology; Race and Cultural Studies; Sociology; Emerging Issues in Science and Technology; Internships; Ind. Study.
Leadership	**Description:** The Leadership Pathway is intended for students interested in focusing on careers connected to management within the political, governmental, and nonprofit sectors. Students in this pathway would be prepared for further study in political science, history, business management, or liberal arts programs.		
	Career Links: Military, Government Administration, Political Science, Administrator, Policy Analyst, Lawyer, Intelligence Officer, Project Manager, Human Resource Professional, Political Advisor, Management Consultant, Public Relations Specialist, Community Development Officer, Non-profit Management, Communications Officer		
Global Studies	**Description:** The Global Studies Pathway option is intended for students interested in careers focused on international trade and / or foreign relations. Students in this pathway would be prepared for further study in programs such as political science, international relations, economics, business, and foreign languages.		**Sample Courses:** World History; Ethics, Economics, Political Science; World Literature; History of Art.
	Career Links: International Business, Foreign Service, Translator/Interpreter, Peace Corps, Global Concerns, Foreign Correspondent, International Development Analyst/Officer, ESL Instructor, International Student Advisor, Embassy/Consular Officer, Intelligence Officer, International Policy Analyst, Lawyer, Economist, United Nations Officer, Humanitarian Relief Worker, International Hotel Administrator, Travel Writer or Photographer		

Learning Pathways	*11th Grade Courses*	*12th Grade Courses*	**Sample Courses:** Psychology, Contemporary Problems; Big History; Journalism, Creative Writing, World Language, Visual and Performing Arts, Science Electives, Internships, Job Shadows, Work Study, Mentoring Programs
Liberal Studies	**Description:** The Liberal Studies Pathway is intended for students interested in obtaining a comprehensive education enabling them to pursue a wide range of career opportunities in which writing and critical thinking are paramount. Students would be prepared for further study in programs such as communications, education, political science, human services, social sciences, and other humanities fields.		
	Career Links: Writer/Editor, Journalist, Communications Specialist, Research Analyst, Project Manager, Marketing Manager, Educator, Policy Analyst, Customer Services Specialist, Grant Writer, Museum Administration, Museum Curator, Psychologist, Social Worker, Public Administrator, Politician, Lawyer, Historian, Archivist, Librarian, Genealogist, Human Resources		
Entrepreneurial & Business	**Description:** The Entrepreneurial and Business Pathway option is intended for students interested in careers focused on business and business management. Students in this pathway would be prepared for further study in business management, business accounting, finance, and advertising, as well as in the basics of starting and running their own small business.		**Sample Courses:** Economics, Marketing, Information and Communication Technologies, Media and Web Design, Personal Finance, Harvard Secondary School Program, Tucks/Dartmouth Programs
	Career Links: Management, Entrepreneurship, Community Development, Finance, Banking, Investment Analyst, Economist, Human Resources, Advertising Executive, Sales Manager, Real Estate Agent, Public Relations Management, Insurance Administrator, Accountant, Budget Analyst, Corporate Auditor		

Final Notes:

Each individual learning pathway will have embedded alternative pathways for demonstrating proficiency of anchor standards under Act 77- Personalized Learning and Flexible Pathways:

- 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)

Anchor Standards: Proficiency Based Graduation Requirement, Common Core State Standards, Next Generation Science Standards

*All Learning Pathways will end with the Senior Year Capstone Project

MOUNTAIN ACADEMY STAFFING PROJECTIONS

WINDSOR SCHOOL DISTRICT
FY18 Wages & Benefits for Act 46 Estimate

01/10/17

	Grade	Hlth	Dntl	2018 Step	DausFTE	FY18 Wages Budget	210 Hlth	215 Dntl	220 FICA	230 Life	235 Disab	240 Rtmt	250 Wrks	260 Unemplc	Total
DISTRICT WIDE															
2130 Health Services															
Nurse	BA/BS	2	2	13	0.50	26,715	8,200	592	2,044	68	59	0	182	85	37,943
						26,715	8,200	592	2,044	68	59	0	182	85	37,943
Health Sevices Total						26,715	8,200	592	2,044	68	59	0	182	85	37,943
DISTRICT WIDE TOTAL						26,715	8,200	592	2,044	68	59	0	182	85	37,943
ELEMENTARY															
1100 Regular Education															
1100 Teachers															
World Language	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Music	MA	0	0	9	0.30	15,915	0	0	1,217	12	11	0	67	266	17,488
STEM Coordinator	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Art	MA	0	0	9	0.20	10,610	0	0	812	68	23	0	72	85	11,669
Teacher Total						132,625	32,798	1,184	10,146	215	267	0	860	520	178,616
Regular Ed Total						132,625	32,798	1,184	10,146	215	267	0	860	520	178,616
Total Elementary						132,625	32,798	1,184	10,146	215	267	0	860	520	178,616
WINDSOR HIGH SCHOOL															
1100 Regular Education															
1100 Teachers															
Flexible Pathway (To-Be-Hired)	MA	2	2	9	1.00	53,050	16,399	592	4,058	41	117	0	222	266	74,745
English Language Arts	MA	2	2	9	1.00	53,050	16,399	592	4,058	41	117	0	222	266	74,745
English Language Arts	MA	2	2	9	1.00	53,050	16,399	592	4,058	41	117	0	222	266	74,745
Mathematics	MA	2	2	9	1.00	53,050	12,053	687	4,058	68	117	0	361	85	70,478
Mathematics	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Mathematics	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Science	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Science	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Science	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Social Studies	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Social Studies	MA	2	2	9	0.50	26,525	8,200	592	2,029	68	58	0	180	85	37,737
Music	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Visual Arts	MA	2	2	9	0.50	26,525	8,200	592	2,029	68	58	0	180	85	37,737
Dance	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Media Literacy	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Special Educator (WSESU)	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Special Educator (WSESU)	MA	2	2	9	1.00	53,050	16,399	592	4,058	68	117	0	361	85	74,729
Teacher Total						848,800	258,039	10,162	64,933	1,067	1,867	0	5,354	1,985	1,192,207

1/10/2017

FY18 Wndsr Wage & Benefit for modeling

1

WINDSOR SCHOOL DISTRICT
FY18 Wages & Benefits for Act 46 Estimate

01/10/17

	Grade	Hlth	Dntl	2018 Step	DausFTE	FY18 Wages Budget	210 Hlth	215 Dntl	220 FICA	230 Life	235 Disab	240 Rtmt	250 Wrks	260 Unemplc	Total
2120 Guidance															
Guidance Director	MA+45	2	2	9	1.00	57,831	16,399	592	4,424	68	127	0	393	85	79,919
HCRS Clinician						40,000	0	0	0	0	0	0	0	0	40,000
						97,831	16,399	592	4,424	68	127	0	393	85	119,919
WINDSOR HIGH SCHOOL TOTAL						946,631	274,438	10,754	69,357	1,134	1,995	0	5,747	2,070	1,312,126
GENERAL FUND TOTAL						1,105,971	315,436	12,531	81,547	1,416	2,321	0	6,789	2,675	1,528,684

FACILITY COST PROJECTIONS

Description	Dimensions	Square ftg.	Cost / foot	Cost
Third Floor		21,000	250	5,250,000
Maker Space	50 x 25	1,250		312,500
Cafeteria	50 x 56	2,800		700,000
		25,050		6,262,500

J. Taft dimension & square footage estimates

250 per sq ft is made up of 20% soft costs (engineering, architecture, furniture & fixtures, mechanical) and 80% hard costs (site work, brick & morter, etc.)

Engelberth Contruction / Estimator: Jim Rose
346-2320 / (802) 355-8907

Ice House Okemo Mtn.

Eleven years ago 1.4 million includes all site work and sewer no refridgeration not enclosed building. Refridgeration system 1 million extra. Alternative refridgeration system 150,000 Estimate with refridgeration 3 million

Indoor Pool Okemo Mtn.

Eight lane indoor pool with enclosed bldg and mechanicals 3.5 - 4.0 million no locker rooms.

Okemo Mtn / Mountain Operations: Ted Reeves (802) 228-1600

Windsor High School Additions	6,262,500
Ice House Rink	3,400,000
Indoor Pool	4,000,000
	13,662,500
20% additional	2,732,500
Bond Amount	16,395,000

UNIFIED DISTRICT – PROJECTED OPERATIONAL RESOURCES

Current Tuition Enrollment: Update
(as of 9/16/16)

	Hartland	Weathersfield	West Windsor	Totals
Total Students	**150**	**105**	**44**	**299**
Tuition at WHS	**19**	**50**	**14**	**83**
Tuition Elsewhere	**131**	**55**	**30**	**216**

Total Windsor Southeast Students Tuitioned Outside the SU = 216 students

Current Windsor High School Enrollment FY'17 = 233
(as of 9/16/16)

Cornish	**18**
Hartland	**19**
Weathersfield	**50**
West Windsor	**14**
Windsor	**132**
Total	**233**

Total Windsor HS Students = 216 students

Projected Enrollment of a Unified High School = 449 students

Total HS Tuition Costs – FY'17 Budgets [represents between 28% - 37% of local budgets]

Hartland	**$ 2,625,469.00**
Weathersfield	**$1,735,479.00**
West Windsor	**$735,661.00**
Total	**$5,096,609.00**

Current Windsor High School Budget

FY'17 High School Budget	**2,699,889**
Current Tuition Revenues from H,W,WW	**1,176,162**

Summary:

Potential Revenues Available for Restructuring = 3,920,447

APPENDIX B. FINANCIAL/TAX PROJECTIONS – WINDSOR SOUTHEAST: SIX ALTERNATIVE MERGER SCENARIOS

Introductory Observations:

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

In the case of Windsor Southeast, the key financial figures for FY'18, prior to any merger are:

	Ed Spending minus local revenues	Equalized Pupils	Cost Per Equalized Pupil
Hartland	$7,730,721.00000	468.5200	$16,500.30095
Weathersfied	$4,954,024.00000	316.3000	$15,662.42175
West Windsor	$2,398,546.00000	140.7200	$17,044.81239
Windsor	$6,234,843.00000	478.3400	$13,034.33332

Model Projections:

This financial model projects trends in future homestead tax rates through FY23 for the districts of Hartland, Weathersfield, Windsor, and West Windsor participating in this study. The model projects:

- The trend lines in Educational Spending and Local Tax rates for different scenarios of merged districts beginning in FY19, and
- The trend lines in Educational Spending and Local Tax rates for those same districts should they remain as they are (No Change Scenario), and,

- The differences in tax rates between a merged scenario and a No Change Scenario and computes the total increases/decreases in tax liabilities through FY23 for a taxpayer with a home valued at $150,000.

Important Caveats on Model Use:

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

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

Assumptions:

- The model assumes that any new unified district would come into existence in FY19.

- The Model uses existing financial data from FY17 and FY18 from each individual district involved in this study for determining the baseline for educational spending, equalized pupils, equalized spending per equalized pupil, etc. for the new merged district.

- It applies a 2% average rate of growth in education spending and a 0% rate of change in equalized pupil counts through FY 23.

- The model builds in the tax incentives associated with a Phase II merger over the first four years for those scenarios that qualify under current state law as incentive mergers. It also takes into account the 5% rate limit on increases or decreases on the homestead property tax rate during that same time frame for incentivized mergers.

- The incentivized model leaves in place the hold-harmless provision on equalized pupil calculations (e.g. equalized pupil counts do not drop more than 3.5% per year) for every eligible district in the new merged district as well as the continuation of small schools grants to eligible districts. Non-incentivized mergers presume the loss of West Windsor's small school grant.

- For the No Change scenario, hold-harmless and small school grants are phased out in accordance with the terms of Act 46. (Hold-Harmless FY21 and Small Schools Grants FY20)

- The model's default setting projects the taxes on a $150,000 house. That setting can be changed to project the potential tax impact on properties assessed at different values.

- **The financial model used by the Committee assumes that no operational savings due to unification will be applied for the purposes of tax relief. Therefore, the model projects just the impact of a new unified Homestead Tax Rate against the "no change" rates for each district and the impact of tax incentives for those options that are eligible to receive those incentives**

Rates of Change:

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

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

To determine a **starting place** for assessing projected rates of change in Educational Spending and Equalized Pupils, all models and scenarios assume a **2% rate of growth in education spending and a 0% change in the number of equalized pupils over the life of the model (FY23).**

Final Notes - Commercial Tax Rates and Income Sensitive Tax Payers:

Note 1: *The Non-homestead rates (commercial and second-home owners) do <u>not</u> benefit from Act 46 incentives in this model either.*

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

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

Summary Observations:

A. In both an incentivized 4-way unified merger, the tax pressure falls on Windsor which has the lowest cost per equalized pupil any unified board will need to consider ways to modify spending to reduce the impact on that community's local taxes. A unified board would likely wish to consider ways to modify spending to reduce the impact on Windsor's local taxes. However, such a merger potentially involves the redirection of a net savings of ~$1 million in tuition savings due to the voluntary elimination of school choice across WSR ($250,000 per year over 4 years). Those resources could be used for tax relief and/or additional program development. Those potential savings, however, are not factored into the model used for projecting the tax impact of a unified merger with a growth rate of 2% over the life of the model (5 Years)

B. In an incentivized 2x2 Merger between West Windsor and Windsor the tax pressure falls on Windsor which has the lowest cost per equalized pupil. Any unified board will need to consider ways to modify spending to reduce the impact on that community's local taxes. However, such a merger involves the redirection of ~$940,000 in existing tuition dollars currently paid by West Windsor over approximately six years that could support program enhancements for all students in the new unified district.

C. In an incentivized 2x2 merger between Hartland and Weathersfield, the district with the lowest cost per pupil is Weathersfield, so the tax pressure falls on Weathersfield and any unified board will need to consider ways to modify spending to reduce the impact on that community's local taxes.

D. In the case of a 3x1 merger between Hartland, Weathersfield, and West Windsor, Weathersfield enters the merger with the lowest cost per equalized pupil and therefore would see additional tax pressure. However, West Windsor's participation would result in an overall savings after grandfathering current 7th and 8th grade students (2 years) of) ~$400,000 to $500,000. There are currently 20-25 students (current grades 5/6 students @ $20,000 per year tuitioning at area middle/high schools. This money could be redirected over time for program development across the new district or for tax relief. This potential operational savings due to tuitions is currently not reflected in the study's tax projection models.

E. In the case of an Alternative Structure where none of the member districts merge, the model projects future tax rates for each district based on a 2% rate of increase in educational spending over the next five years and a 0% increase in equalized pupils.

F. In the case of a required merger between Hartland and Weathersfield, the tax pressure continues to fall on Weathersfield, and the impact on Weathersfield tax payers is a bit higher without the mitigating intervention of tax incentives.

G. In the case of an Alternative Structure with a voluntary merger between Windsor and West Windsor, the tax pressure continues to fall on Windsor, and the impact on Windsor tax payers is a bit higher without the mitigating intervention of tax incentives. In addition, non-incentivized mergers do not come with a cap on increases or decreases in the homestead tax rate – a factor that benefits West Windsor whose taxpayers will receive the full benefit of a new unified rate in a merger with Windsor. However, such a merger involves the redirection of ~$940,000 West Windsor tuition dollars over approximately six years in support of program enhancements for all students in the new district.

I. Projected Homestead Tax Rates for a New Unified Union District

Equalized Homestead Tax Rates Unified District: 2% annual growth in Spending

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5557	1.5080	1.5593	1.6113	1.6639
Weathersfield	1.5799	1.5544	1.4767	1.5080	1.5593	1.6113	1.6639
West Windsor	1.9006	1.6916	1.6070	1.5267	1.5593	1.6113	1.6639
Windsor	1.3765	1.2936	1.3583	1.4262	1.4975	1.5724	1.6639
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356
Windsor	1.3765	1.2936	1.3195	1.3459	1.3728	1.4002	1.4282

Summary approximate tax impact over 5 years on a $150,000 home (incentives only):

e. Hartland: tax savings of $1,191 (~$238 savings/year)
f. Weathersfield: tax savings of $648 (~$130 savings/year)
g. West Windsor: tax savings of $1,913 (~$383 savings/year)
h. Windsor: tax increase of $978 (~$196 increase/year)

II. Projected Homestead Tax Rates for Windsor/West Windsor Unified District: (Incentivized 2x2)

Financial Note on Windsor/West Windsor Merger:

In addition to the impact of the tax incentives in a merger between Windsor and West Windsor, the new unified district would benefit from an overall savings after grandfathering current tuition students of ~$940,000. There are currently 47 students @ $20,000 per year not tuitioning at Windsor Middle/High School. This money could be redirected for program development or tax relief. This operational savings due to tuitions is currently not reflected in the study's tax projection models.

Windsor West Windsor Merger: <u>Incentivized</u> Merger; 2% annual growth in Spending

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
West Windsor	1.9006	1.6916	1.6070	1.5267	1.4504	1.4782	1.5281
Windsor	1.3765	1.2936	1.3318	1.3800	1.4288	1.4782	1.5281
No Change							
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356
Windsor	1.3765	1.2936	1.3195	1.3459	1.3728	1.4002	1.4282

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (incentives only):

c. West Windsor: tax savings of $2,479 (~$496 savings/year)
d. Windsor: tax increase of $420 (~$84 increase/year)

III. Projected Homestead Tax Rates for Hartland/Weathersfied Unified District: (Incentivized 2x2)

Hartland/Weathersfied Merger: Incentivized Merger; 2% annual growth in Spending.

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5562	1.6089	1.6623	1.7163	1.7710
Weathersfield	1.5799	1.5544	1.5562	1.6089	1.6623	1.7163	1.7710
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (incentives only):

c. Hartland: tax savings of $567 (~$113 decrease/year)
d. Weathersfield: tax increase of $95 (~$19 increase/year)

IV. Projected Homestead Tax Rates for Hartland/Weathersfield/West Windsor Unified District: (Incentivized 3x1)

Financial note on Hartland/Weathersfield/West Winds Merger:

West Windsor's participation in a merger with Hartland and Weathersfield would result in an overall savings after grandfathering current 7th and 8th grade students (2 years) of) ~$400,000 to $500,000. There are currently 20-25 students (current grades 5/6 students @ $20,000 per year tuitioning at area Middle/High Schools. This money could be redirected over time for program development across the new district or for tax relief. This potential operational savings due to tuitions is currently not reflected in the study's tax projection models.

Hartland/Weathersfield/West Windsor Merger: Incentivized Merger; 2% annual growth in Spending.

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.5697	1.6227	1.6764	1.7307	1.7857
Weathersfield	1.5799	1.5544	1.5697	1.6227	1.6764	1.7307	1.7857
West Windsor	1.9006	1.6916	1.6070	1.6227	1.6764	1.7307	1.7857
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162
West Windsor	1.9006	1.6916	1.7255	1.8240	1.8605	1.8977	1.9356

Summary approximate tax impact <u>over 5 years</u> on a $150,000 home (incentives only):

d. Hartland: Tax savings of $461 (~$92 decrease/year)
e. Weathersfield: Tax increase of $201 (~$40 increase/year)
f. West Windsor: Tax savings of $1,231 (~$246 decrease/year)

V. Hartland/Weathersfied Required Merger – No State Incentives/Alternative Structure

Equalized Homestead Tax Rates: Required Merger, No Incentives, 2% Annual Growth in Spending

Equalized Homestead Tax Rates: Required Merger

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
Hartland	1.6011	1.6376	1.6362	1.6689	1.7023	1.7363	1.7710
Weathersfield	1.5799	1.5544	1.6362	1.6689	1.7023	1.7363	1.7710
No Change							
Hartland	1.6011	1.6376	1.6703	1.7037	1.7378	1.7726	1.8080
Weathersfield	1.5799	1.5544	1.5855	1.6172	1.6496	1.6826	1.7162

Summary approximate tax impact over 5 years on a $150,000 home (Required Merger/No incentives):

a. Hartland: tax savings of $267 (~$53 decrease/year)
b. Weathersfield: tax increase of $395 (~$79 increase/year)

VI. Windsor West/Windsor Voluntary Merger: Non-Incentivized Merger/Alternative Structure:

Introduction:

Due to the fact that this merger would not be supported by tax incentives, the projected financial impact of such a merger is outlined below using the same model used for projecting the tax impact of merging districts, but without incentives:

However, as noted earlier in this report, a merger between Windsor and West Windsor, would benefit from an overall savings after grandfathering current tuition students of ~$940,000. There are currently 47 students @ $20,000 per year not tuitioning at Windsor Middle/High School. This money would be redirected for program development and not reflected in projected tax rates.

The model also assumes the loss of West Windsor's small schools grant as this merger is not a preferred or incentivized merger under the law. This assumption, however, awaits a final determination by the State Board.

Equalized Homestead Tax Rates: Required Merger, No Incentives, 2% Annual Growth in Spending

Equalized Homestead Tax Rates

	FY17	FY18	FY19	FY20	FY21	FY22	FY23
Unified District, effective FY19; Model 1							
West Windsor	1.9006	1.6916	1.3456	1.4229	1.4874	1.5532	1.6204
Windsor	1.3765	1.2936	1.3456	1.4229	1.4874	1.5532	1.6204
No Change							
West Windsor	1.9006	1.6916	1.7424	1.8587	1.9144	1.9719	2.0310
Windsor	1.3765	1.2936	1.3324	1.3724	1.4136	1.4560	1.4996

Summary approximate tax impact over 5 years on a $150,000 home (no incentives):

c. West Windsor: tax savings of $3,055 (~$611 decrease /year)
d. Windsor: tax increase of $510 (~$102 increase/year)

APPENDIX C. STATEMENT OF VALUES

Windsor Southeast Supervisory Union Statement of Values

District	Description	Address	City	State	Zip	Stories	Sq. Ft.	Yr. Built	Const. Type	Sprinklers	Smoke / Fire	# of Employees
WSESU	Office	105 Main Street Suite 200	Windsor	VT	05089	1	1,400	2001		yes	yes	73.46
West Windsor	Albert Bridge School	108 Hartland Brownsville Rd	West Windsor	VT	05037	1	18,028	1955	1	no	yes	12.50
Hartland	Hartland Elementary School	97 Martinsville Road	Hartland	VT	05048	1	53,000	1985	2	no	yes	46.06
Hartland	Hartland Elementary School	98 Martinsville Road	Hartland	VT	05049	1	53,500	1963	1	no	no	0.00
Hartland	Hartland Elementary School	99 Martinsville Road	Hartland	VT	05049	1	incl	re	1	no	no	0.00
Weathersfield	Weathersfield School	135 Schoolhouse Road	Weathersfield	VT	05030	2	56,458	1980	4	no	yes	35.62
Out Bldg. 1	Weathersfield School	136 Schoolhouse Road	Weathersfield	VT	05030	1	incl	1989	1	no	no	0.00
Windsor	Windsor High School / State Street School	19 Ascutney St. / 127 State St.	Windsor	VT	05089	3	122,854	1900	2	yes	yes	63.42
Field Bldg 1	Windsor High School / State Street School	20 Ascutney St. / 127 State St.	Windsor	VT	05089	1	incl	1935	4	no	no	0.00
Field Bldg 2	Windsor High School / State Street School	21 Ascutney St. / 127 State St.	Windsor	VT	05089	1	incl	1985	1	no	no	0.00
Field Bldg 3	Windsor High School / State Street School	22 Ascutney St. / 127 State St.	Windsor	VT	05089	1	incl	1980	1	no	no	0.00

Windsor Southeast Supervisory Union Statement of Values

Description	Address	City	Bldg Values	Business & Personel	Insurable Site Improv	Computer Equip	Books & Valuable Papers	Mobile Equip	Auto	BI / EE*	Grand Total	*BI/EE Business interuption insurance
Office	105 Main Street Suite 200	Windsor Southeast SU	0	26,523		35,000	0	0	0	1,000,000	1,061,523	
Albert Bridge	108 Hartland Brownsville Rd	West Windsor	2,925,700	163,568	32,700	84,000	0	1,500	0	0	3,207,468	
Hartland Elem	97 Martinsville Road	Hartland	6,912,900	673,142	89,600	300,000	0	3,800	0	0	7,979,442	
Hartland Elem	98 Martinsville Road	Hartland	25,000	15,914		0	0	0	0	0	40,914	
Hartland Elem	99 Martinsville Road	Hartland	38,000	37,132		0	0	0	0	0	75,132	8,095,488
Wthrsfld School	135 Schoolhouse Road	Weathersfield	9,372,200	419,000	31,400	205,000	0	1,000	0	0	10,028,600	
Out Bldg. 1	136 Schoolhouse Road	Weathersfield	2,500	1,591		0	0	0	0	0	4,091	10,032,691
Windsor High School / State Street School	19 Ascutney St. / 127 State St.	Windsor	20,923,000	1,355,362	353,738	890,000	0	100,000	0	0	23,622,100	
Field Bldg 1	20 Ascutney St. / 127 State St.	Windsor	5,000	42,436		0	0	0	0	0	47,436	
Field Bldg 2	21 Ascutney St. / 127 State St.	Windsor	5,000	5,305		0	0	0	0	0	10,305	
Field Bldg 3	22 Ascutney St. / 127 State St.	Windsor	5,000	13,261		0	0	0	0	0	18,261	23,698,102
			40,214,300	2,753,234		1,514,000	0	106,300	0	1,000,000	46,095,272	

Statement of Long-Term Debt

District	Amount Outstanding 03/29/17	Annual Principal Payment	Pay off Date	Estimate 07/01/18 Balance
Weathersfield	3,140,000	285,000	12/01/27	2,855,000
West Windsor	595,000	80,000	11/15/25	515,000

APPENDIX D: PROJECTED TUITION RESOURCES FOR PROGRAM AND INSTRUCTIONAL ENHANCEMENT - WEST WINDSOR /WINDOR MERGER

WEST WINDSOR/WINDSOR MERGER PROJECTED RESOURCES

Albert Bridge Tuition Enrollment:

	2016 Total	2016 at Windsor
7th Grade	12	4
8th Grade	17	7
9th Grade	15	4
10th Grade	9	2
11th Grade	4	3
12th Grade	12	2
Total	**(69)**	**(22)**

Total Tuition not at Windsor: 47

Tuition Cost: 47 x $20,000 =	**$940,000 Projected Operational Savings in Tuition Based on Current not Future Enrollments**

Analysis of Windsor Middle/High School Capacity

7/8 Team	38 + 42 = 80 4 teachers

APPENDIX E: Additional Analysis - Smarter Balanced Testing Results

2015 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	61%	30%	61%	44%	51%
	Not Free & R	Not Enough	Not Enough	Not Enough	50%	64%
	Free and R	Not Enough	Not Enough	Not Enough	38%	45%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	12%
4						
	All	Not Enough	42%	60%	40%	51%
	Not Free & R	Not Enough	57%	72%	33%	62%
	Free and R	Not Enough	18%	50%	43%	35%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	11%
5						
	All	Not Enough	42%	59%	52%	56%
	Not Free & R	Not Enough	Not Enough	63%	55%	69%
	Free and R	Not Enough	Not Enough	54%	50%	39%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	11%
6						
	All	66%	43%	70%	36%	53%
	Not Free & R	Not Enough	50%	Not Enough	50%	65%
	Free and R	Not Enough	27%	Not Enough	23%	35%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	7%
7						
	All	N/A	61%	59%	58%	55%
	Not Free & R	N/A	Not Enough	60%	66%	66%
	Free and R	N/A	Not Enough	58%	52%	36%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	8%
8						
	All	N/A	38%	62%	30%	53%
	Not Free & R	N/A	56%	Not Enough	40%	63%
	Free and R	N/A	25%	Not Enough	20%	36%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	8%
11					**WHS**	
	All	N/A	N/A	N/A	52%	57%
	Not Free & R	N/A	N/A	N/A	66%	65%
	Free and R	N/A	N/A	N/A	28%	39%
	Special Ed	N/A	N/A	N/A	Not Enough	10%

2015 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	46%	38%	61%	44%	51%
	Not Free & R	N/A	N/A	N/A	50%	64%
	Free and R	N/A	N/A	N/A	38%	35%
	Special Ed	N/A	N/A	N/A	N/A	15%
4						
	All	N/A	40%	69%	22%	44%
	Not Free & R	N/A	38%	90%	16%	56%
	Free and R	N/A	43%	50%	26%	29%
	Special Ed	N/A	N/A	N/A	N/A	10%
5						
	All	N/A	26%	40%	34%	41%
	Not Free & R	N/A	N/A	36%	44%	52%
	Free and R	N/A	N/A	45%	23%	25%
	Special Ed	N/A	N/A	N/A	N/A	6%
6						
	All	56%	24%	50%	33%	47%
	Not Free & R	N/A	26%	N/A	62%	48%
	Free and R	N/A	18%	N/A	5%	21%
	Special Ed	N/A	N/A	N/A	N/A	3%
7						
	All	N/A	61%	51%	52%	43%
	Not Free & R	N/A	N/A	46%	46%	53%
	Free and R	N/A	N/A	58%	57%	26%
	Special Ed	N/A	N/A	N/A	N/A	3%
8						
	All	N/A	30%	45%	36%	40%
	Not Free & R	N/A	37%	N/A	53%	49%
	Free and R	N/A	25%	N/A	20%	24%
	Special Ed	N/A	N/A	N/A	N/A	3%
11					**WHS**	
	All	N/A	N/A	N/A	34%	37%
	Not Free & R	N/A	N/A	N/A	37%	44%
	Free and R	N/A	N/A	N/A	28%	20%
	Special Ed	N/A	N/A	N/A	N/A	2%

2016 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	63%	69%	55%	32%	54%
	Not Free & R	N/A	75%	75%	46%	65%
	Free and R	N/A	61%	27%	20%	39%
	Special Ed	N/A	N/A	N/A	N/A	14%
4		N/A				
	All	N/A	61%	53%	31%	54%
	Not Free & R	N/A	81%	52%	44%	66%
	Free and R	N/A	40%	54%	17%	37%
	Special Ed	N/A	N/A	N/A	N/A	13%
5		N/A				
	All	N/A	60%	57%	53%	58%
	Not Free & R	N/A	70%	N/A	50%	68%
	Free and R	N/A	43%	N/A	55%	42%
	Special Ed	N/A	N/A	N/A	N/A	14%
6		N/A				
	All	N/A	41%	40%	51%	56%
	Not Free & R	N/A	55%	N/A	57%	67%
	Free and R	N/A	18%	N/A	41%	39%
	Special Ed	N/A	N/A	N/A	N/A	11%
7		N/A				
	All	N/A	52%	77%	52%	58%
	Not Free & R	N/A	61%	81%	80%	69%
	Free and R	N/A	27%	72%	21%	39%
	Special Ed	N/A	N/A	N/A	N/A	9%
8		N/A				
	All	N/A	68%	78%	61%	59%
	Not Free & R	N/A	75%	81%	70%	68%
	Free and R	N/A	54%	72%	52%	41%
	Special Ed	N/A	N/A	N/A	N/A	11%
11					**WHS**	
	All	N/A	N/A	N/A	62%	57%
	Not Free & R	N/A	N/A	N/A	76%	65%
	Free and R	N/A	N/A	N/A	33%	38%
	Special Ed	N/A	N/A	N/A	N/A	10%

2016 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	36%	66%	70%	39%	56%
	Not Free & R	N/A	75%	93%	46%	67%
	Free and R	N/A	53%	36%	33%	41%
	Special Ed	N/A	N/A	N/A	N/A	18%
4						
	All	N/A	25%	57%	22%	50%
	Not Free & R	N/A	31%	58%	16%	62%
	Free and R	N/A	20%	54%	29%	32%
	Special Ed	N/A	N/A	N/A	N/A	14%
5						
	All	N/A	45%	N/A	28%	43%
	Not Free & R	N/A	54%	N/A	35%	53%
	Free and R	N/A	31%	N/A	22%	28%
	Special Ed	N/A	N/A	N/A	N/A	10%
6						
	All	N/A	34%	N/A	36%	41%
	Not Free & R	N/A	44%	N/A	38%	51%
	Free and R	N/A	18%	N/A	33%	25%
	Special Ed	N/A	N/A	N/A	N/A	5%
7						
	All	N/A	52%	72%	47%	46%
	Not Free & R	N/A	64%	81%	76%	56%
	Free and R	N/A	18%	63%	15%	28%
	Special Ed	N/A	N/A	N/A	N/A	6%
8						
	All	N/A	65%	59%	61%	44%
	Not Free & R	N/A	75%	56%	76%	54%
	Free and R	N/A	45%	63%	47%	26%
	Special Ed	N/A	N/A	N/A	N/A	4%
11					**WHS**	
	All	N/A	N/A	N/A	50%	37%
	Not Free & R	N/A	N/A	N/A	57%	45%
	Free and R	N/A	N/A	N/A	33%	19%
	Special Ed	N/A	N/A	N/A	N/A	1%

2017 Smarter Balanced Test Results – Windsor Southeast						
English - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	37%	35%	38%	44%	49%
	Not Free & R	Not Enough	66%	Not Enough	53%	61%
	Free and R	Not Enough	15%	Not Enough	26%	34%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	12%
4						
	All	18%	75%	53%	44%	49%
	Not Free & R	Not Enough	78%	60%	57%	59%
	Free and R	Not Enough	69%	45%	33%	34%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	9%
5						
	All	Not Enough	54%	65%	50%	55%
	Not Free & R	Not Enough	71%	75%	50%	68%
	Free and R	Not Enough	42%	53%	50%	37%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	13%
6						
	All	Not Enough	39%	59%	36%	52%
	Not Free & R	Not Enough	54%	63%	35%	62%
	Free and R	Not Enough	17%	54%	37%	37%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	10%
7						
	All	N/A	44%	57%	48%	48%
	Not Free & R	N/A	56%	Not Enough	Not Enough	66%
	Free and R	N/A	30%	Not Enough	Not Enough	38%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	9%
8						
	All	N/A	57%	69%	38%	54%
	Not Free & R	N/A	62%	Not Enough	42%	64%
	Free and R	N/A	45%	Not Enough	33%	38%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	9%
11					**WHS**	
	All	N/A	N/A	N/A	42%	58%
	Not Free & R	N/A	N/A	N/A	53%	66%
	Free and R	N/A	N/A	N/A	21%	39%
	Special Ed	N/A	N/A	N/A	Not Enough	11%

2017 Smarter Balanced Test Results – Windsor Southeast						
Math - % Proficient and Above						
Grade		**Albert Bridge**	**Hartland**	**Weathersfield**	**Windsor**	**Vermont**
3						
	All	56%	22%	55%	53%	52%
	Not Free & R	Not Enough	41%	Not Enough	60%	65%
	Free and R	Not Enough	10%	Not Enough	40%	37%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	14%
4						
	All	9%	43%	61%	27%	47%
	Not Free & R	Not Enough	52%	66%	28%	58%
	Free and R	Not Enough	30%	54%	26%	32%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	12%
5						
	All	Not Enough	27%	55%	20%	42%
	Not Free & R	Not Enough	50%	56%	16%	54%
	Free and R	Not Enough	10%	53%	25%	26%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	8%
6						
	All	Not Enough	31%	50%	26%	38%
	Not Free & R	Not Enough	41%	54%	35%	48%
	Free and R	Not Enough	17%	45%	18%	25%
	Special Ed	Not Enough	Not Enough	Not Enough	Not Enough	6%
7						
	All	N/A	28%	52%	45%	43%
	Not Free & R	N/A	Not Enough	Not Enough	Not Enough	53%
	Free and R	N/A	Not Enough	Not Enough	Not Enough	28%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	5%
8						
	All	N/A	32%	47%	53%	41%
	Not Free & R	N/A	41%	Not Enough	66%	50%
	Free and R	N/A	9%	Not Enough	38%	25%
	Special Ed	N/A	Not Enough	Not Enough	Not Enough	4%
11					**WHS**	
	All	N/A	N/A	N/A	38%	36%
	Not Free & R	N/A	N/A	N/A	53%	44%
	Free and R	N/A	N/A	N/A	11%	17%
	Special Ed	N/A	N/A	N/A	Not Enough	1%

Free and Reduced % By School 2017

ABS – 35%; HES – 37%; Weathersfield – 40%; Windsor K-6 – 55%; 7-12 – 44%; Vermont State Avg – 39%

Support Services % By School (IEP, 504, EST)

ABS – Not Enough; HES – 9%; Weathersfield – 21%; Windsor K-6 – 17%; 7-12 – 12%; Vermont State Avg – 24%

Vermont Top Ten/Twenty Schools Testing Results 2016

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

Note:

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

APPENDIX F: WINDSOR SOUTHEAST STRATEGIC PLAN

Windsor Southeast Supervisory Union

STRATEGIC PLAN

2016 – 2019

Revised
April 2017

Developed by:

Windsor School Board
Hartland School Board
Weathersfield School Board
West Windsor School Board

Table of Contents

STRATEGIC PLANNING COMMITTEE

Hartland
Bettina Read, Chair
Nicole Buck
Dan Emanuele
Eric Kleber
Scott Richardson
Principal – Christine Bourne

West Windsor
Elizabeth Burrows, Chair
Nancy Pedrick
Bill Yates
Principal – Jen Aldrich

Weathersfield
Sean Whalen, Chair
Jacquelin Antonovich
Laura McNaughton
Robin Tindall
Heidi Remick
JeanMarie Oakman -Principal

Windsor
Amy McMullen, Chair
Kris Garnjost
Carl Malikowski
Beth Carter
Sherrie Greeley
Tiffany Cassano – Principal

SU Employees
David Baker, Superintendent
Ed Connors, Chief Financial Officer
Larry Dougher, Chief Information Officer
Angie Ledeau, Curriculum Director
Karen Woolsey, Director of Student Support Services
Jan Crow, Director of Early Childhood Education

Vision for Quality

The Windsor Southeast Supervisory Union exists to inspire each every learner to become a curious, confident, and engaged citizen who embraces opportunities and challenges. We will prepare all students across the member districts to become responsible, caring, and contributing members of a complex global society; through a partnership between and among the communities of Hartland, Windsor, West Windsor, and Weathersfield.

.

Our Mission

The mission of the Windsor Southeast Supervisory Union is to establish a system of public schooling that supports the healthy development of each individual child. The system will support the best curriculum, instruction and assessment practices that ensure that each child reaches their full academic and social potential. The member school districts**,** together, will develop programs that encourage creativity, experiential learning, individual responsibility, and a general commitment to the greater community good. Understanding that each district's resources are limited, the supervisory union will establish strong collaboration between and among the individual schools; recognizing that we are much stronger together than we are apart. As a result, students, staff and community will be aware of the rich culture and heritage of each of the member communities. Our schools will focus on personalized learning, challenging expectations, and the development of core academic and social values that ensure our children's future success. Our schools will embrace a collaborative work ethic that respects authentic team work and values input from each member of the school community. We envision a learning community that recognizes the uniqueness of every child and the value of living in vibrant rural settings.

WE BELIEVE THAT:

- A growth model is important so that students are not measured at an arbitrary point in time;
- Everyone can be a responsible, caring, and contributing member of our communities;
- Everyone needs to be an engaged learner that actively participate in the learning process;
- Learning should be fun;
- Risk taking needs be encouraged, and creativity embraced;
- Experiential learning and real life application is important to a well-developed curriculum;

- Our schools need to be caring places that help students connect disciplines, prepare for uncertainty, and develop a passion for learning;
- Our schools are an important part of a system that makes our own communities better;
- Good schools are founded on strong leadership, excellent teaching, and unshakeable community support.

Goals

Based on our core beliefs, the Windsor Southeast Supervisory Union will:

- Be a model supervisory union that embraces collaboration between and among member school districts;
- Establish a set of curriculum, instruction, and assessment standards that challenge students and staff to greater excellence and encourage project-based learning;
- Develop policies and procedures that encourage vibrant learning communities and respect the individual qualities of each student;
- Ensure our budgets support our beliefs, goals, and work plan strategies;
- Acknowledge that our programs and practices will be stronger if our individual districts continue to work together;
- Demand high performance from board members, administrators, teachers and students;
- Expect our schools to be vibrant contributors to our communities;
- Hold all members of our school communities to a high level of accountability.

Work Plan Strategies

We have developed a specific three-year action plan around the following four strategies:

- Vision for Leading the Focus on Climate, Teaching, and Learning
- Ensuring Equity and Adequacy of Fiscal and Human Resources
- Engaging Families and Community
- Ensuring Accountability for Results

Goal 1: Vision for Leading the Focus on Climate, Teaching, and Learning

Strategies	Person(s) Responsible	Timeline	Implementation Status (1- Not Implemented:5-Fully Implemented)	Evidence
Develop (research) a system of co-teaching with regular educators and special educators to encourage merging those two accountability systems	Director of Student Support Services/Admin Team	Fall 2017		Observation and teacher feedback
Establish a curriculum that is tied to the common core and state/national standards and reflects best practices in instructional planning under the direction of the Curriculum Director who will ensure the provision of high quality staff development to all staff	Curriculum Director in consultation with the principals and Superintendent	(ELA and Math)**Done** (Science and Social Studies) Fall 20017 Fall 2018 (All other Areas)	Vermont Early Learning Standards (VELS) were adopted for Birth-Grade 3	Curriculum Documents posted on web-site

Implementation of project proficiency based curriculum units PK-12 that reflect integrated content and reflect team-based approaches to instruction.	Curriculum Director in consultation with the principals and Superintendent	Fall 2018		Unit maps based on cross curricular standards and performance indicators
Develop and implement concise MTSS protocols and provide comprehensive professional development for both academic and behavioral norms. (Re-visit Develop as an SU?)	Curriculum Director in consultation with the principals and Superintendent	Spring 2018		Publish MTSS manual
Ensuring positive school cultures by developing Positive Behavior Interventions and Supports across all grade levels with emphasis on Responsive Classroom, PBIS, CPS protocols to support MTSS implementation.	Director of Student Support Services, Director of Curriculum and administrative team	Ongoing		Teacher , student, and parent feedback
Identify **cross curricular** priority standards for each grade level PK-12	Curriculum Director; principals and teacher leaders	Fall 2018		Identified Cross-Curricular Power standards

Hire additions Sped staff to handle Intensive behavior and academic needs.	Director of Student Support Services in consultation with the principals and Superintendent	Ongoing		Number of staff and ratios

Goal 2: Ensuring Equity and Adequacy of Fiscal and Human Resources

Strategies	Person(s) Responsible	Timeline	Implementation Status (1- Not Implemented:5-Fully Implemented)	Evidence
Develop budgets that reflect the goals of our strategic plan	School Boards in conjunction with the Superintendent and principal	Ongoing		Detailed budgets

Provide for adequate staff development in Multi-Tiered System of Supports (MTSS), and Proficiency Based Learning	School Boards, Superintendent, Curriculum Director and principals	Ongoing		Increase in proficiency based classes. EQS position review. Positive teacher response survey
Establish new opportunities for organizing more cost efficient staff development	School Board, Administrative Council, Curriculum Director, Principal, Teachers	Fall 2018		Have teachers providing staff development (Trainer of trainer model)

Goal 3: Engaging Families and the Community

Strategies	Person(s) Responsible	Timeline	Implementation Status (1- Not Implemented:5-Fully Implemented)	Evidence
Develop and promote a series of community forums on a range of topics; • Curriculum • Assessment • Act 46 • Universal PK • Budgets	Superintendent in cooperation with the school boards and principals.	Ongoing		Early Literature Series Open House Videos on SU Website Displays School Report Night Opening Picnic Using signs Panther Cub Night Budget Meetings Act 46 Meeting Act 46 Forums
Develop a comprehensive volunteer base that would include expanded community projects and potentially contract a Supervisory Union Parent Coordinator on a part-time basis.	Building level people – teacher leaders and staff	Spring 2017		Seniors as Readers Grandparent Program Four Winds Green up Speakers at Schools Community Celebrations Volunteers in Action Hartland Community Connect MAPP Windsor Community Partners Mentoring

Utilize a wide range of social and tradition communications to share information, opportunity, events and celebrations to inform, engage community members	Boards and Superintendent	Spring 2017		No central email repository for residents PowerSchool/School Messenger Advertising – Signs Facebook, Twitter, E-mail E-mail Groups Dashboard, Google Plus, Linked in, Town Manager Weekly, Front Porch Forum, Hartland Listserv WSESU and School websites

Goal 4: Ensuring Accountability for Results

Strategies	Person(s) Responsible	Timeline	Implementation Status (1- Not Implemented:5-Fully Implemented)	Evidence
Develop a local assessment plan consistent with AOE quality standard 2123.2	Curriculum Director with teacher leaders	Spring 2018		Local assessment plan
Develop a system of grade reporting that is more consistent with a standards-based approach across all grade levels and schools	Curriculum (Director) in consultation with admin team and superintendent	Fall 2017		Full implementation of the web portal for reporting
Develop a system for creating Personal Learning Plans (PLP's) for each student in the Supervisory Union	Administrative Team	Spring 2018		Template for PLP's

APPENDIX G: MIDDLE/HIGH SCHOOL TUITION ENROLLMENT PATTERNS – WSE FY2018

Hartland Tuition Students

School	Grade 9	Grade 10	Grade 11	Grade 12	9-12 Total
Hartford	27	9	7	11	54
Windsor	4	5	3	2	14
Woodstock		3	1	5	9
Thetford	4	3	7	1	15
Hanover	8	17	5	4	34
KUA	1		3	3	7
Proctor Academy			1		0
Sharon Academy	3		2	5	10
Stratton Mtn.			1		1
Totals	47	37	30	31	145

Weathersfield Tuition Students

School	Grade 9	Grade 10	Grade 11	Grade 12	9-12 Totals
Bellows Falls		1	1		2
Green Mountain		1			1
Springfield	9	4	7	7	27
Windsor	11	12	14	6	43
Woodstock		3	1	4	8
Lebanon		1			1
Hanover	1		2	1	4
Sunapee		1			1
Brewster Academy			1		1
Compass	1	2		1	4
Vermont Academy			1		1
Marvel Wood	1				1
Totals	23	25	27	19	94

West Windsor Tuition Students

School	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	7-12 Totals
Thetford		1	1	1			3
Windsor	3	2	5	2	2	3	17
Woodstock	1	3	6	6	3	1	20
Caridgan Mtn		1					1
Richmond/Hanover	3	2	1	3	3		12
Waldorf School	1	1					2
KUA				2	1		3
Hanover High			1	3	3		7
Compass		1	1				2
Totals	8	11	15	17	12	4	67

APPENDIX H: WAIVER REQUEST LETTER ON WSE SU REPRESENTATION

WINDSOR SOUTHEAST SUPERVISORY UNION
Hartland • Weathersfield • West Windsor • Windsor School Districts

105 Main Street, Suite 200 • Windsor, Vermont 05089
(802) 674-2144 • fax (802) 674-6357

December 1, 2017

State Board of Education
219 North Main ST. Suite 402
Barre, VT 05641

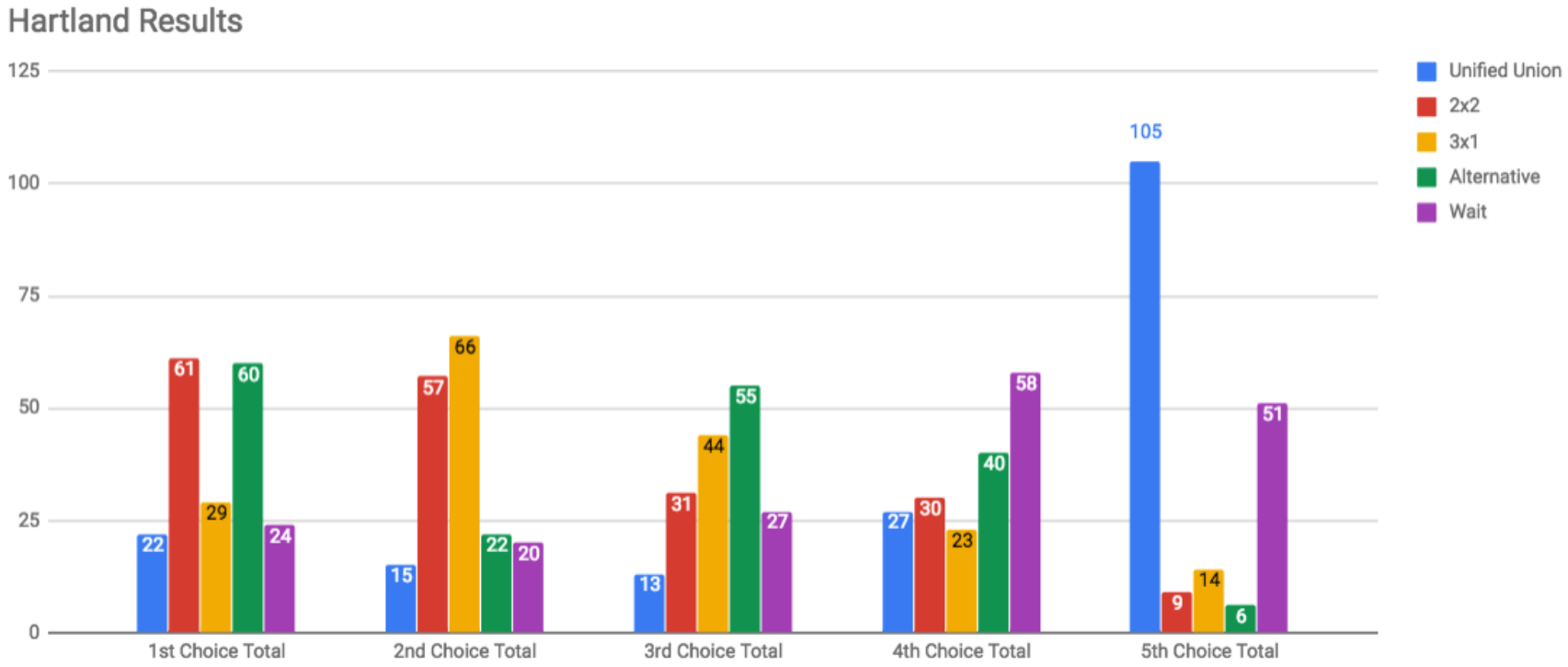
TO WHOM IT MAY CONCERN:

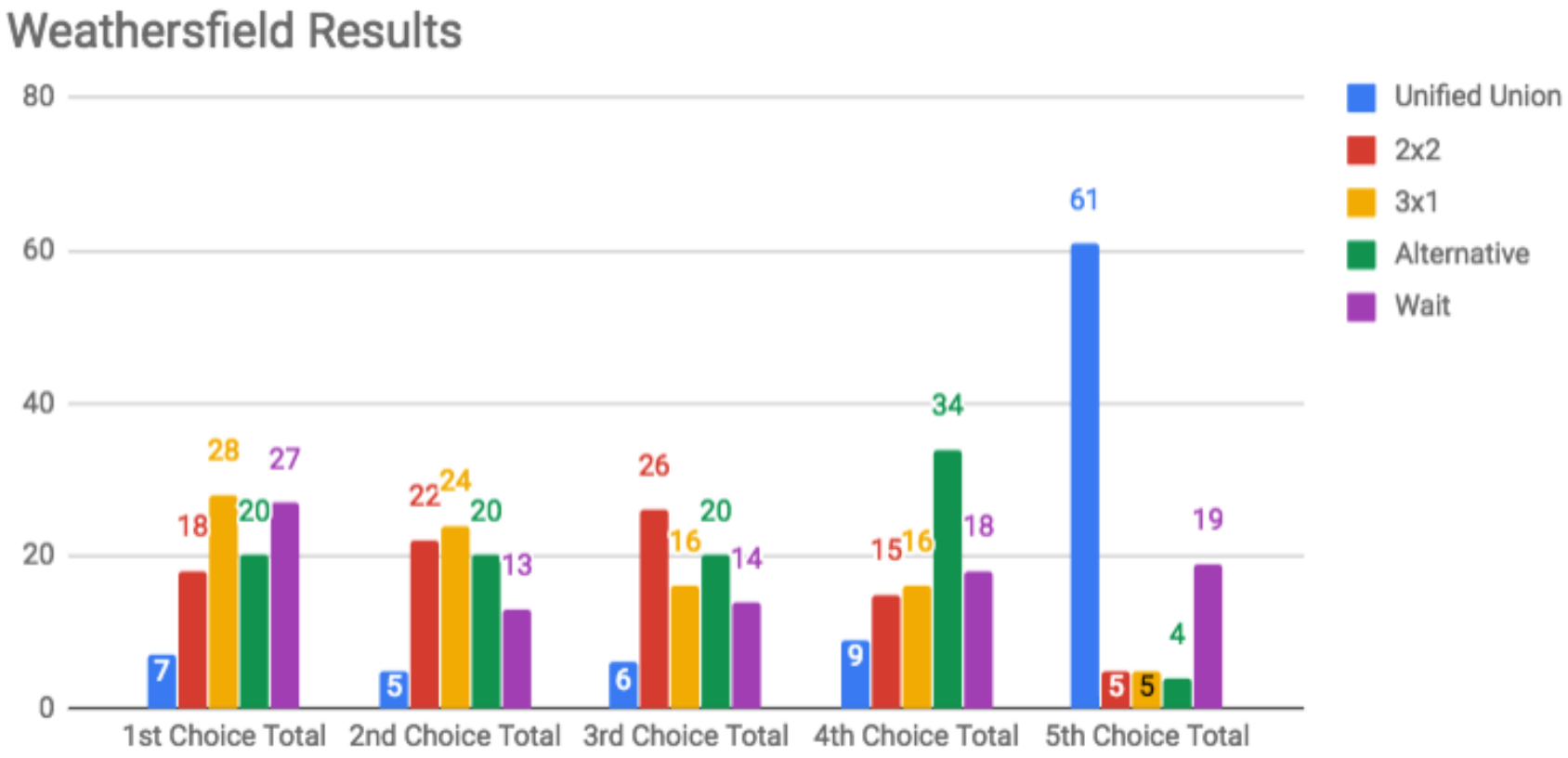
At their meeting on October 4, 2017 the Windsor Southeast Supervisory Union Board authorized me to request a waiver to the Union Board structure, Title 16, Chapter 7, Section 266, should the enclosed 706B Alternative Structure be approved. Specifically, the request would allow for three representatives from each town (Windsor, West Windsor, Wethersfield, and Hartland) respectively, rather than three representatives from each school district.

Respectfully,

David W. Baker
Superintendent

APPENDIX I – FORUM SURVEY RESULTS

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Unified Union
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3x1
Alternative
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18
28
20
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24
20
13
6
26
16
20
14
9
15
16
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18
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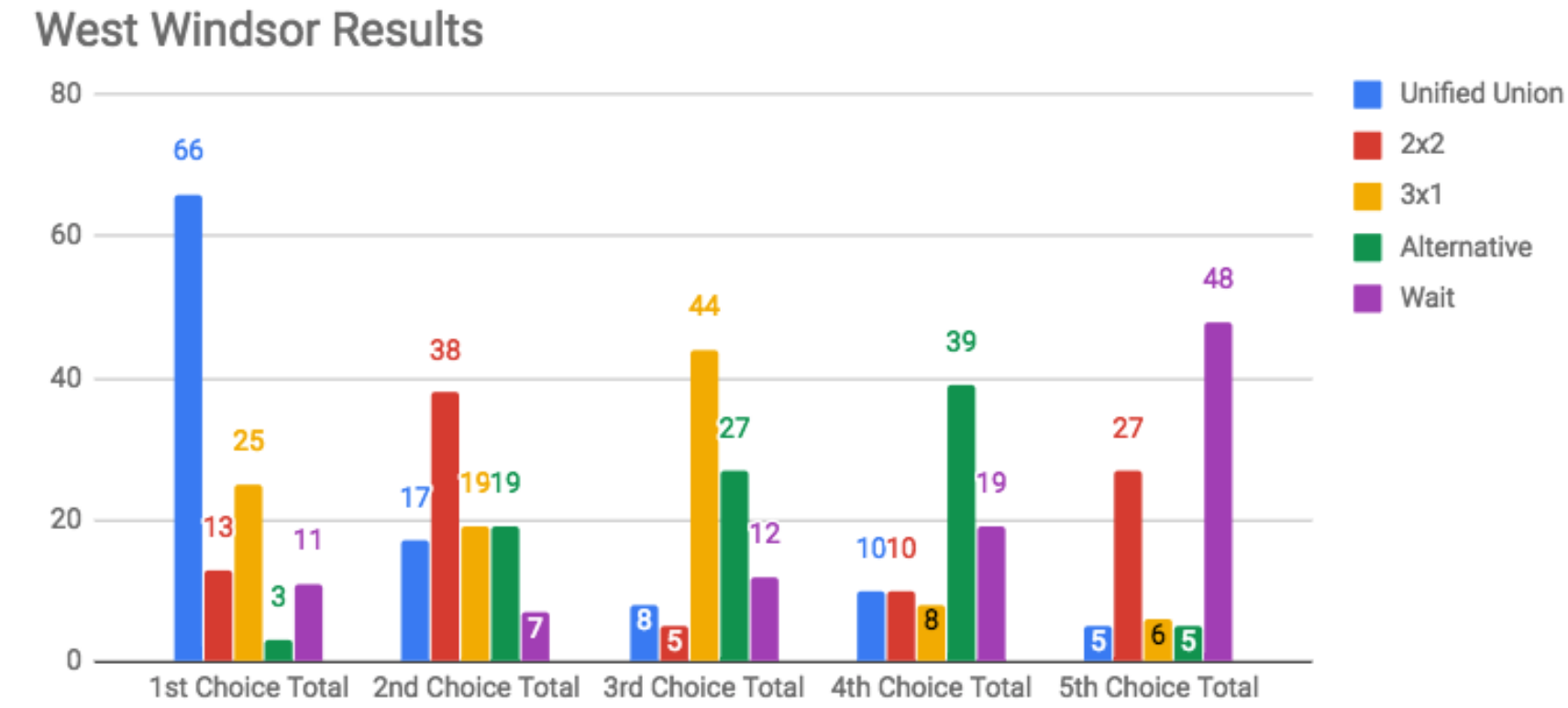
1st Choice Total
2nd Choice Total
3rd Choice Total
4th Choice Total
5th Choice Total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66
13
25
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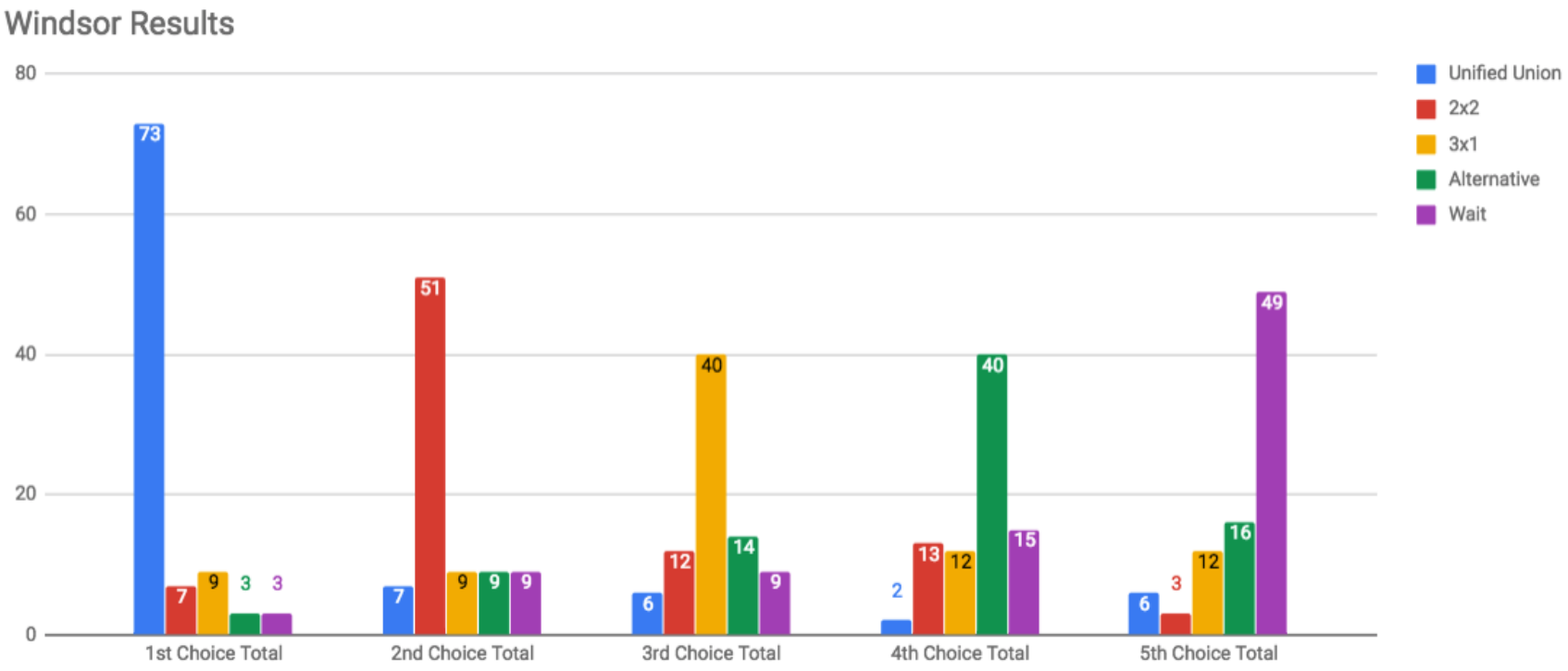
11
17
38
19
19
7
8
5
44
27
12
10
10
8
39
19
5
27
6
5
48
1st Choice Total
2nd Choice Total
3rd Choice Total
4th Choice Total
5th Choice Total
Unified Union
2x2
3x1
Alternative
Wait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20
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73
7
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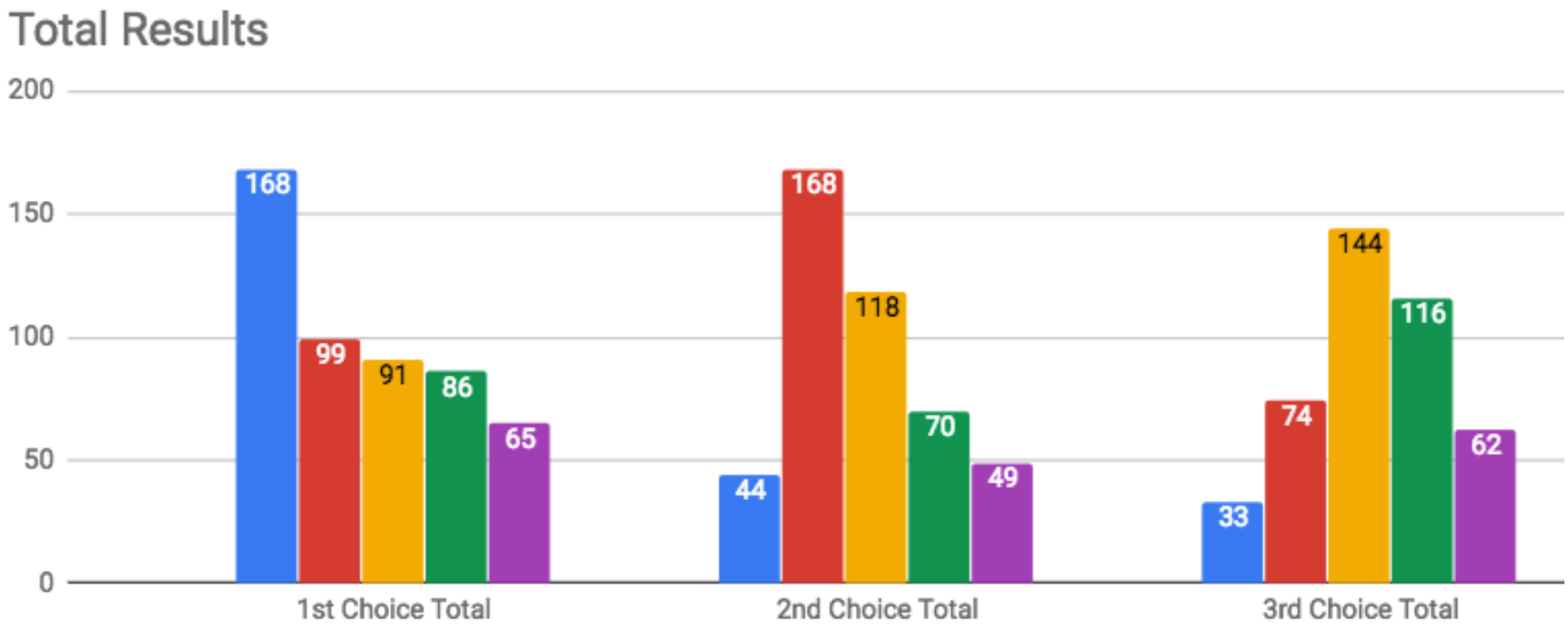
3
7
51
9
9
9
6
12
40
14
9
2
13
12
40
15
6
3
12
16
49
1st Choice Total
2nd Choice Total
3rd Choice Total
4th Choice Total
5th Choice Total
Unified Union
2x2
3x1
Alternative
Wait


Total Results
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100
50
0
168
99
91
86
65
44
168
118
70
49
33
74
144
116
62
1st Choice Total
2nd Choice Total
3rd Choice Total