

AGENCY OF EDUCATION
Barre, Vermont

TEAM: School Governance Team

ITEM: Will the State Board of Education find that the proposed unified union school district formed by two or three member districts of the **FRANKLIN NORTHEAST SUPERVISORY UNION (FNESU)** 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 **Bakersfield/Berkshire/Montgomery Act 46 Study Committee** (Study Committee)?

RECOMMENDED ACTION:

- 1. That the State Board of Education finds that the proposed formation of a new unified union school district by two or three member districts of the FNESU, provisionally to be named the FRANKLIN NORTHEAST PK-8 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, to the FNESU 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; Act 153 (2010), Secs. 2-4, as amended; Act 156 (2012), Sec. 15, as amended, Act 46 (2015), as amended; Act 49 (2017)

BACKGROUND INFORMATION:

I. General

The FNESU consists of five PK-12 districts: the Enosburgh and Richford School Districts, both of which operate schools for all grades PK-12, and the Bakersfield, Berkshire, and Montgomery School Districts, all of which operate schools through grade 8 and pay tuition for all remaining grades.

After passage of Act 46 in 2015, the five FNESU districts formed a single study committee under 16 V.S.A. § 706. In early 2016, the study committee proposed creation of one unified union school district (UUSD) that would provide for the education of the PK-12 students in all five towns by operating one or more schools for each grade. The study committee identified three of the districts as “necessary” and the remaining two as “advisable.” If approved, the new district would have been fully operational on July 1, 2017 and would have been eligible for tax rate reductions and other transitional assistance under the “Accelerated Merger” program created by Act 46. The

State Board approved the proposal on April 26, 2016. Voting on June 7, 2017, the electorate of the districts did not approve creation of the new district.

After conversations at the board level and with the communities, the school boards of the five districts voted in September 2017 to create two new study committees to consider creation of two new unified union school districts – one that would operate schools for all grades, PK-12, and the other that would operate schools through grade 8 and pay tuition for grades 9-12.

Both new study committees are presenting proposals to the State Board at its October 18, 2017 meeting. If the State Board and voters approve creation of both districts, then the new unified districts would be eligible for tax rate reductions and other transitional assistance available under the “Side-by-Side” program established in Act 156 of 2012, Sec. 15. In addition, also pursuant to the Side-by-Side program, the study committees intend that the two new unified districts would be members of the same supervisory union.

II. “The Franklin Northeast PK-8 Unified Union School District”¹

The Study Committee proposes the creation of a UUSD that would provide for the PK-12 education of resident students by operating schools offering education through grade 8 and would pay tuition for students in grades 9-12 (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): Bakersfield; Berkshire.

The Study Committee identifies the following school district as “advisable” to the proposal pursuant to 16 V.S.A. § 701b(b)(2): Montgomery.

In FY2017, the combined average daily membership (ADM) of the two “necessary” districts was 515.75 (Bakersfield: 208.00; Berkshire: 307.75) and the combined ADM of all three named districts was 713.68 (Montgomery: 197.93). The combined FY2017 ADM of the other two FNESU districts was 892.25 (Enosburgh: 498.82; Richford: 393.43) for a total ADM in the SU of 1,605.93.

If approved by the State Board, the electorate of the three districts will vote on November 28, 2017 whether to approve creation of the New Unified District.

The New Unified District, which would provisionally be known as “the Franklin Northeast PK-8 Unified Union School District,” would merge either two or three existing PK-12 town school districts into a single district responsible for operating schools through grade 8 and paying tuition for the remaining four grades.

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

¹ Although the provisional name references only the “PK-8,” the New Unified District would be a single PK-12 school district that operates schools for students in PK through grade 8 and pays tuition for students in grades 9 through 12.

The Articles would require the New Unified District Board to develop policies and procedures for intradistrict choice for PK-8 students prior to the 2020-2021 academic year.

No school could be closed, or building grade configuration changed, unless approved by both the New Unified District Board and the voters of the town in which the building is located.

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

The merger vote and election of initial board members would take place by Australian ballot, as required by statute. All later votes on the budget and board membership would be by Australian ballot.

The proposal includes three provisions in Article 1 regarding the subsequent admission of other districts as full members of the New Unified District:

- If the Montgomery voters do not approve creation of the New Unified District but subsequently approve a proposal to join the District by a vote held before July 29, 2018, then the New Unified District voters consent in advance to Montgomery's admission.
- Similarly, by voting to create the New Unified District, the voters consent in advance to the admission of any unmerged district with the same operating and tuitioning structure within or bordering the FNESU if the State Board directs the unmerged district to merge in the statewide plan.
- Any other request to join the New Unified District would proceed pursuant to 18 V.S.A. § 721.

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.

In the Overview of both unification proposals, the Study Committees acknowledge that there is variability in the offerings and supports available to students in the current school districts. For example, not all schools employ literacy and math interventionists, or instructional coaches to support teacher development in these areas. Some "schools have embedded support and intervention blocks in the master schedule, where every child receives either support or enrichment without missing new instruction in the classroom, and some schools primarily utilize pull-out services, whereby students miss first instruction in the classroom in order to receive services." Teacher turnover is "quite high" in the region. The Overview further observes:

Tuitioning Districts often face, unexpected and unbudgeted high school tuition cost increases that can be incredibly detrimental to the PK-8 budget, creating the need for significant cuts to occur at that level in order to be able to pay the tuition

bill. By merging the governance of the three schools together, there is some insulation from the spikes in tuition costs, as the burden can be shared across three communities instead of one. Under existing governance structures, some schools have maintained class sizes that are too small to be cost effective but don't have the option of sharing staff to address this problem.

The Study Committees believe, however, that transition to two unified systems will be "relatively easy:"

All FNESU schools are currently governed by unified policies, hire and manage teachers based on the same negotiated master agreement, ... and rely on the instructional leadership of the Central Office administration for both curriculum and professional development. ... Given some of the centralized functions that have been in place for quite some time, local School District Board members have demonstrated their ability to work without prejudice to meet the needs of the collective communities.

EDUCATION IMPLICATIONS:

The Study Committee identified a range of potential educational benefits of restructuring the delivery of PK-8 education in a unified system, including:

- "Increased program options in specialized courses such as World Languages, Algebra, Coding, etc. Students could potentially participate remotely or staff could travel to offer courses in any of the schools."
- "Increased efficiency in supporting the training of new teachers in currently existing initiatives and programs, ensuring more consistency and fidelity."
- "Increased ability to equalize class sizes across the system through flexibility of teacher assignments"
- "Increased flexibility for movement of students among schools in certain situations."
- "Consistency of technology access."

FISCAL IMPLICATIONS:

The Study Committee's report stated that unification will eliminate the need to develop and approve three separate budgets and to engage in "intergovernmental accounting transactions within the UUSD." In addition, The Study Committee anticipates that unification will have other positive fiscal implications, including:

- "Greater sharing of both teaching and non-teaching staff at the district level. Sharing could allow for increased opportunity for formerly part-time positions in multiple districts to be one full-time position in the UUSD."
- "Increase[d] ability to offer more equitable class sizes across our new system through flexibility of staff assignments."

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

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

As with other proposals recently before the State Board, we note for the record that the proposal's restrictions on flexibility diminish opportunities for savings and strengthening of programs and opportunities. We anticipate that the New Unified District will need to continue to evaluate ways in which it can work to achieve long-term sustainability.

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

Study Committee Worksheet for All Phases of Voluntary Merger

Please submit this to the Agency with the Study Committee Report

BAKERSFIELD/BERKSHIRE/MONTGOMERY

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
FRANKLIN NORTHEAST SUPERVISORY UNION	BAKERSFIELD TOWN SCHOOL DISTRICT	X	
FRANKLIN NORTHEAST SUPERVISORY UNION	BERKSHIRE TOWN SCHOOL DISTRICT	X	
FRANKLIN NORTHEAST SUPERVISORY UNION	MONTGOMERY TOWN SCHOOL DISTRICT		X

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

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)): 11/28/17	
Date on which the new district, if approved, will begin operating (16 V.S.A. § 706b(b)(12)): 07/01/19	
Combined ADM of all “necessary” districts in the current fiscal year: 514	
Proposed name of new district: Franklin Northeast PK-8 Unified Union School District	

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

The Proposed School District is in the Best Interest of the State, Students, and School Districts – as required by 16 V.S.A. § 706c		
<p><u>Goal #1:</u> The proposed union school district will provide substantial equity in the quality and variety of educational opportunities.</p> <p><i>Act 46, Sec. 2(1)</i></p>	<p>The committee has identified some inequities in the amount of instructional time dedicated to English/Language Arts and Mathematics between the three PK-8 schools. In addition, there are inequities in the amount of instructional time offered for students in Art, Physical Education, and Music education. (see Appendix G) The newly elected Unified Union School District (UUSD) Board will need to consider these inequities once it assumes responsibility for the programs in all the PK-8 schools.</p> <p>Our proposed (UUSD) will result in:</p> <ul style="list-style-type: none"> • Increased consistency and equity of opportunity by having a single UUSD Board: <ul style="list-style-type: none"> ○ A single mission statement / unified vision ○ A single strategic plan ○ Continued consistency in curriculum development ○ Consistency in Common PK-8 Assessment Plan ○ Consistency in delivery of student support systems • Increased ability of administrators to focus on engaging in visionary and collaborative instructional leadership • Increased program options in specialized courses such as foreign languages, algebra, coding, etc. Students could potentially participate remotely or staff could travel to offer courses in a variety of schools 	

	<ul style="list-style-type: none"> • Increased efficiency in supporting the training of new teachers in currently existing initiatives and programs, ensuring more consistency and fidelity • Increased opportunities, not only in core subjects, but also in extracurricular and extended school year programs and activities • Increased ability to equalize class sizes across the system through flexibility of teacher assignments • A commitment to preserving the character and unique culture of each school • The ability to share resources and staff expertise among all schools • Increased flexibility for movement of students among schools in certain situations as determined by the UUSD Board • Increased opportunities for preschool programs to extend learning beyond the minimum 10 hours per week and provide more equitable access to students in each Member School 	
<p><u>Goal #2:</u> The proposed union school district will lead students to achieve or exceed the State’s Education Quality Standards, adopted as rules by the State Board of Education at the direction of the General Assembly.</p> <p><i>Act 46, Sec. 2(2)</i></p>	<p>As noted above, the committee is aware of the existing staffing, and instructional time gaps that exist between the three PK-8 schools in the Franklin Northeast Supervisory Union. The committee is aware of the challenges all PK-8 schools will continue to face to meet the rigorous Education Quality Standards (EQS). However, the committee feels that a Unified Union governance structure will maximize the ability to support students at ALL levels who need additional time and support and those who need to be provided with relevant and challenging enrichment opportunities in order to work towards meeting or exceeding the EQS for ALL students. This will:</p> <ul style="list-style-type: none"> • Ensure consistency in curriculum development • Provide greater consistency in delivery of Multi-Tiered Systems of Supports (MTSS) • Enhance the ability to recruit and retain skilled teachers with a shared staffing model in the three towns. Teacher turnover is quite high in the region, and stability can increase the experience level of staff, which benefits student learning outcomes (see Appendix I) • Provide for an opportunity to utilize interventionists and instructional coaches in all schools (see Appendix I) • Coordinate opportunities for students in all schools to provide accelerated learning opportunities • Coordinate high-quality professional development opportunities through access to the in-house expertise that exists within the UUSD • Continue to standardize common curriculum goals and assessment priorities among the PK-8 schools • Ensure consistency of technology access for all PK-8 students • Continue to develop a Proficiency Based Learning system in our PK-8 schools 	

	<ul style="list-style-type: none"> • Continue to align Proficiency Based Graduation Requirements for middle schools and Transferrable Skills in all PK-8 schools • Continue to develop a system of building Personalized Learning Plans for all students grades 7-8 in the UUSD 	
<p><u>Goal #3:</u> The proposed union school district will maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with a goal of increasing the district-level ratio of students to full-time equivalent staff.</p> <p><i>Act 46, Sec. 2(3)</i></p>	<p>The Franklin Northeast Supervisory Union has already realized many operational efficiencies by:</p> <ul style="list-style-type: none"> • Providing centralized Special Education services • Centralizing transportation services • Centralizing collective bargaining for professional staff • Aligning policies and procedures • Centralizing the accounting system <p>The approved voluntary merger and creation of a UUSD among the three PK-8 schools (Bakersfield, Berkshire and Montgomery) would allow the UUSD to:</p> <ul style="list-style-type: none"> • Eliminate the need to develop and approve three separate budgets • Reduce the number of state and federal reports • Eliminate the intergovernmental accounting transactions within the UUSD • Permit greater sharing of both teaching and non-teaching staff at the UUSD level; sharing allows increased opportunity for formerly part-time positions in multiple districts to be one full-time position in the UUSD • Increase ability to offer more equitable class sizes across the new system through flexibility of staff assignments (ability to flexibly split very large classes or combine very small classes into potential multi-age/grade configurations) • Continue to support consolidated efforts in curriculum, instruction, transportation, delivery of student support systems, and overall finance operations • Maximize operational efficiencies through the flexibility to manage, share, and transfer resources as part of a joint contract which might include: <ul style="list-style-type: none"> ○ Implementing a system to share resources to manage building and grounds, including: ○ Expanding centralized purchasing in areas such as cleaning supplies, heating oil, school supplies and technology ○ Streamlining Supervisory Union level support of one board rather than three <ul style="list-style-type: none"> ○ Single budget = fewer audits (one audit instead of three) ○ Realized savings when purchasing “teacher/student count” subscriptions, and other instructional materials, bulk mailings, etc. 	

	<ul style="list-style-type: none"> ○ Centralized contracts = consistency in wages and working conditions 	
<p><u>Goal #4:</u> The proposed union school district will promote transparency and accountability.</p> <p><i>Act 46, Sec. 2(4)</i></p>	<p>The Franklin Northeast Supervisory Union currently consists of five School District Boards with a total of twenty-five members and a Supervisory Union Board with fifteen members, two middle/high schools, two PK-5 schools, three PK-8 schools, and one Career and Technical Center.</p> <p>A Unified Union governance structure will include two UUSDs: the PK-8 operating/9-12 tuitioning district will have six board members, and the PK-12 operating district will have six board members. The Supervisory Union Board will consist of six members overseeing the entire PK-12 Supervisory Union, three from each UUSD side. The 706b Study Committee believes this new governance structure will result in greater uniformity of educational expectations and experiences for all students in the UUSD and will increase teacher, board, and administrative accountability by:</p> <ul style="list-style-type: none"> • Increasing community participation and voice in the electoral process by establishing a uniform date and consistent method of voting in the three communities. Under the Articles of Agreement of the new FNESU PK-8 UUSD, the vote will occur by Australian ballot on Town Meeting Day. This is a change from the current system where two towns, Bakersfield and Berkshire, vote by Australian ballot on Town Meeting day and one town, Montgomery, votes from the floor a week later at a separate Annual School Meeting. • Decreasing the number of boards allows for: <ul style="list-style-type: none"> ○ transparency among the three schools ○ SU level administrators’ ability to focus more deeply on schools and leadership • Having equal representation for each community, with voters from all three towns voting on board members of the UUSD from all communities adds another layer of accountability; community members will have an individual voice at the polls to acknowledge the work that board members are doing to demonstrate a collective responsibility for all students PK-12 in all three communities • Establishing structures to support community and family engagement, including the potential for the establishment of Community Advisory Councils in each community 	
<p><u>Goal #5:</u> The proposed union school district will deliver education at a cost that parents, voters, and taxpayers value.</p> <p><i>Act 46, Sec. 2(5)</i></p>	<p>The 706b Study Committee recognizes the burden that school funding places on taxpayers and the need to provide both high quality and affordable educational opportunities. The proposed plan:</p> <ul style="list-style-type: none"> • Reduces the number of annual audits and the associated costs from three to one • Streamlines accounting systems (e.g., one budget instead of three) • Increases purchasing power 	

	<ul style="list-style-type: none"> • Shares resources to manage building and grounds • Maintains Small School Support Grants in the form of Merger Support Grants for Bakersfield and Montgomery • Maintains 3.5% hold harmless protection (It would be less likely to trigger this provision with the combined enrollment numbers in the three PK-8 schools) • Allows communities to access the tax rate reductions for the first four years of consolidation in order to buffer the transition to a single tax rate in these three communities. (This is temporary relief and is not a driving force behind this decision to consolidate.) • PK-8 budgets are heavily driven by predictions of high school enrollment and residency of those same students: In a combined budget, there would be no need to budget for the same student (high mobility situations) in more than one budget; those fluctuations would have less of a negative impact on the programming in any one school because the burden would be softened by sharing with partner districts 	
<p><u>Regional Effects:</u></p> <p>What would be the regional effects of the proposed union school district, including: would the proposed union school district leave one or more other districts geographically isolated?</p> <p><i>Act 46, Section 8(a)(2)</i></p>	<p>The FNWSU is in the process of submitting a Section 9 proposal to the Secretary of Education. If that proposal is not approved, Sheldon could be left structurally and geographically isolated. There are no schools in that supervisory union which operate PK-8 and tuition 9-12. In addition, if the FNESU Voluntary side-by-side merger is approved, Sheldon would not have another like structure nearby to merge with, unless Alburgh fails to successfully merge. FNESU reached out to Sheldon in July to see if there was interest in joining FNESU for discussions that might have included the Sheldon School District; however, FNWSU was already in the process of moving forward with a Section 9 Alternative Governance proposal. Board Members of the new PK-8 UUSD would be open to future partnerships.</p>	

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

<p>(3) The grades to be operated by the proposed union school district</p> <p>The grades, if any, for which the proposed union school district shall pay tuition</p>	<p>Operating PK-8, Tuitioning 9-12</p>	
<p>(4) The cost and general location of any proposed new schools to be constructed</p> <p>The cost and general description of any proposed renovations</p>	<p>There are no proposed construction or renovation plans for any of the schools in this district.</p>	
<p>(5) A plan for the first year of the proposed union school district's operation for:</p> <p>(A) the transportation of students</p> <p>(B) the assignment of staff</p> <p>(C) curriculum</p> <p>The plan must be consistent with existing contracts, collective bargaining agreements, and other provisions of law, including 16 V.S.A. chapter 53, subchapter 3 (transition of employees)</p>	<p>A) The Franklin Northeast Supervisory Union centralized transportation in 2015; no necessary adjustments to the transportation plan are anticipated. However, having the flexibility to make adjustments as opportunities arise in the future could allow for cost savings.</p> <p>B) Teacher turnover in FNESU is quite high and schools almost always face the need to hire new staff annually. If there were a need to reduce staffing in one school, the UUSD Board would have the ability to reassign in another school. Having a shared staffing structure would also allow for the district to make more equitable class sizes throughout.</p> <p>C) The Franklin Northeast Supervisory Union, and Member Districts, have been working collaboratively for more than a decade in order to align curriculum and resources; examples include: adopting common resources in literacy and math in PK-5 and writing PK-8, aligning curriculum expectations through creating common curriculum maps PK-12, developing SU wide report cards, adopting standards based grading practices, offering content and grade level professional development opportunities at the Supervisory Union Level, developing a Supervisory Union level New Teacher Mentoring system and developing common Proficiency Based Graduation Requirements</p> <p>(FNESU already has a supervisory union wide transportation contract and collective bargaining agreement.)</p>	
<p>(6) The indebtedness of the proposed merging districts that the proposed union school district shall assume.</p>	<p>The status of indebtedness in the three PK-8 towns is represented in Appendix D. At the close of the FY 19 fiscal year, the total debt of the Merging Districts will equal \$3,923,750.</p>	

<p>(7) The specific pieces of real property owned by the proposed merging districts that the proposed union school district shall acquire, including:</p> <ul style="list-style-type: none"> * their valuation * how the proposed union school district shall pay for them 	<p>The Merging Districts will convey to the UUSD all of their school-related real and personal property, for One Dollar:</p> <ul style="list-style-type: none"> • Bakersfield School \$3,417,500 • Bakersfield Outbuildings/Storage \$17,000 • Berkshire School \$3,316,600 • Berkshire Outbuildings/Storage \$23,000 • Montgomery School \$2,676,000 • Montgomery Outbuildings/Storage \$12,000 <p>(The UUSD will assume all associated capital debt)</p>	
<p>(8) <i>[repealed 2004 Acts and Resolves No. 130, Sec. 15]</i></p>		
<p>(9) Consistent with the proportional representation requirements of the Equal Protection Clause, the method of apportioning the representation that each proposed member town shall have on the proposed union school board</p> <ul style="list-style-type: none"> * no more than 18 members total * each member town is entitled to at least one representative * <i>see also</i> 16 V.S.A. § 706k(c): one or more at-large directors * <i>see also</i> 16 V.S.A. § 707(c): weighted voting 	<p>The UUSD Board will have six members whose representation will be determined equitably with votes being cast at large in each community.</p> <ul style="list-style-type: none"> • Bakersfield – 2 seats • Berkshire – 2 seats • Montgomery – 2 seats 	
<p>(10) The term of office of directors initially elected, to be arranged so that one-third expire on the day of each annual meeting of the proposed union school district, beginning on the second annual meeting, or as near to that proportion as possible</p>	<p>As noted in Article 8 of the Articles of Agreement, the new UUSD Board members’ terms are staggered in accordance with this recommendation.</p>	
<p>(13) Any other matters that the study committee considers pertinent, including whether votes on the union school district budget or public questions shall be by Australian ballot <i>(please list each matter separately)</i></p>	<ul style="list-style-type: none"> • The 706b Study Committee established that future budget votes will be conducted by Australian ballot. 	

LYNN, LYNN, BLACKMAN & MANITSKY, P.C.

October 3, 2017

Lynn Cota, Superintendent of Schools
Franklin Northeast Supervisory Union
PO Box 130
Richford, VT 05476

Re: Proposed New Unified Union School District Board Membership

Dear Lynn:

I am writing to confirm that the proposal set forth by the School Districts of Bakersfield, Berkshire, and Montgomery pertaining to Board membership of the proposed Unified Union School District using an At-Large Hybrid model meets the requirements of the Equal Protection Clause of the United States Constitution and 16 V.S.A. §796(b)(9).

The Equal Protection Clause of the Fourteenth Amendment requires equal voting strength, and protects against dilution of the right to vote by disproportionate representation. This guarantee extends to the election of local school officials who exercise general governmental powers. *Hadley v. Junior Coll. Dist.*, 397 U.S. 50, 53 (1970). Mathematical precision, however, is not necessary; rather “the overriding objective must be substantial equality of population among the various districts.” *Reynolds v. Sims*, 377 U.S. 533, 569, 579 (1964). The Supreme Court has held that generally, an apportionment plan with a maximum population deviation under 10% is considered a minor deviation. *Brown v. Thomson*, 462 U.S. 835, 842 (1983). A plan with larger disparities, however, remains Constitutional if there is a rational basis for the larger deviation. *Reynolds*, 377 U.S. at 579.

The At-Large Hybrid model, one where seats on the Board are allocated to member towns, nominations come from the voters of the member town, and where the a union wide vote is held on all candidates, has been upheld as being consistent with the Equal Protection Clause as long as the members are representatives of the union wide electorate and not the town of residence because it provides for an equal voting strength for all voters in the union district. *Barnes v. Board of Directors, Mount Anthony Union High School Dist. (No. 14)*, 418 F. Supp. 845, 852 (D. Vt. 1975).

Article 7 of the Articles of Agreement provides for an At-Large Hybrid model for the new board. It lays out the initial Board membership of six members with two slots allocated to Bakersfield, two slots allocated to Berkshire and two slots allocated to Montgomery. Nominations will come from the voters of each town for the slots allocated to that town. The qualified voters of the union-wide electorate will vote on all nominations and those elected will represent the entire electorate, not just the town of residence. Nominations will occur pursuant to 16 V.S.A. §

Superintendent Lynn Cota
October 3, 2017
Page 2

706e(b) (submission of a statement of nomination signed by at least 30 voters in that town or one percent (1%) of the legal voters of that town whichever is less and accepted by the nominee). The vote on candidates shall occur consistent with 16 V.S.A. §706e(c) (vote on candidates will be at-large). Using these terms, the Articles of Agreement establish the use of an At-Large Hybrid model consistent with the Court's ruling in *Barnes*.

Under the requirements of 16 V.S.A. § 706(b)(9), the Board must have at least one representative from each community. The proposal has two members for each community. This requirement is thus satisfied. Further, the statute requires that the board have no more than 18 members. With the proposed six member board this element is also met.

Based on our analysis, the proposed Articles of Agreement meet the requirements of the Equal Protection Clause of the United States Constitution and 16 V.S.A. §796(b)(9).

Montgomery has been designated as an advisory district. If Montgomery does not approve the merger and Bakersfield and Berkshire do, the merger will go forward. In this case, there will be a four person board, with two slots allocated to Bakersfield and two slots allocated to Berkshire. This does not change our analysis above and the proposed At-Large Hybrid model in such a scenario still meets the requirements of the Equal Protection Clause of the United States Constitution and 16 V.S.A. §796(b)(9).

Sincerely,

LYNN, LYNN, BLACKMAN & MANITSKY, P.C.


Cindy Koenemann-Warren, Esq.
cindykw@lynnlawvt.com

cc: Donna Russo-Savage, Vermont Agency of Education

Final Report
BAKERSFIELD/BERKSHIRE/MONTGOMERY

Act 46 Study Committee

Report Recommending Side by Side Merger and Unification, Under Act 46 & Act 49

- Section One: Majority Report/Overview
- Section Two: Unification Study Committee Report
- Section Three: Articles of Agreement
- Appendix A: Cost Benefit Analysis
- Appendix B: Demographic and Financial Data
- Appendix C: Advantages for Students
- Appendix D: Status of Facilities, Debt, Reserve Funds
- Appendix E: Public Forum Summary Data
- Appendix F: Proposed Governance Chart
- Appendix G: Equity in Course Offerings/Instructional Time Data
- Appendix H: Equity in Access to Technology Data
- Appendix I: Equity in Access to Student Support Services
- Appendix J: Board Apportionment
- Appendix K: School Choice Option

Bakersfield, Berkshire & Montgomery

Section 1: Majority Report/Overview

In September 2017, the School District Boards of Franklin Northeast Supervisory Union (FNESU) Member Districts voted to form two 706b Study Committees under Act 46 and Act 49. The objective of the Study Committees was to examine district merger options that would provide increased educational opportunities and equity for students while creating more operational efficiencies through district-level mergers. After thoughtful research and careful analysis, community feedback and extensive committee member discussions, this 706b Study Committee supports bringing to the voters a proposal to create a Side-by-Side Merger, with two UUSDs under the Franklin Northeast Supervisory Union umbrella.

This introduction summarizes the collective views of the 706b Study Committee in an effort to explain why we are recommending an Alternative Structure Side-by-Side Merger under Act 46 & Act 49, creating two Unified Union School Districts (UUSDs): a PK-12 Operating UUSD and a PK-8 Operating/9-12 Tuitioning UUSD under the existing Franklin Northeast Supervisory Union. FNESU will continue to be the umbrella organization that works with both Member Districts in order to improve educational quality and provide for more equitable access to learning opportunities and services, while sharing both financial and human resources to ensure the affordability and sustainability of our efforts.

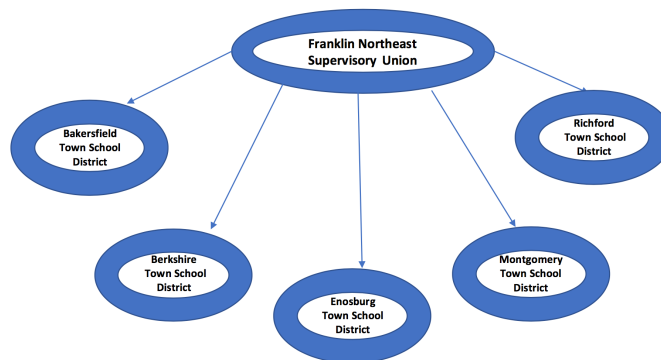
Our Current Structure and Our History

FNESU currently has five autonomous but connected school districts which provide education to all children PK-12. FNESU Member Boards have a long history of working collaboratively. In 1915, the school districts of Berkshire, Montgomery and Richford joined to form FNESU. In 1924, the Enosburg Town School District joined FNESU. The Enosburgh Falls ID School District joined in 1940. In 1954, the two Enosburgh districts merged to form one district. The Bakersfield School District joined FNESU in 1968. The long-standing partnerships in this supervisory union and the sense of community shared among the five towns make moving forward under a more unified system both exciting and appealing to members of this committee, staff, administration, local boards and to many members of our communities.

Current Governance

Currently, two school districts—Enosburg and Richford—are responsible for the education of all of the children in each respective community in grades PK-12. These two Member School Districts each operate a separate high school and send students to the Cold Hollow Career and Technical Center. Three other school districts—Bakersfield, Berkshire and Montgomery—each operate elementary/middle schools PK-8. Those same districts are responsible for the education

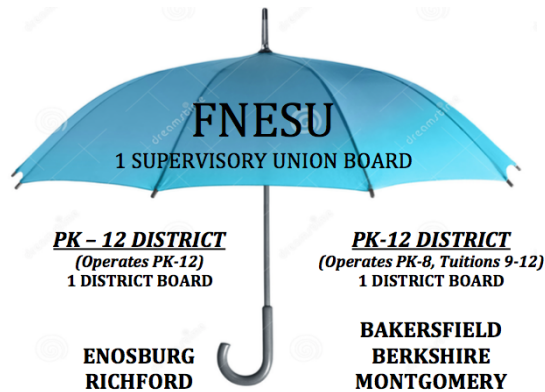
of all resident 9-12 students who tuition to various high schools within and outside of the Supervisory Union. Each of these five Member School Districts are part of FNESU, which also has its own School Board, and provides services to all of its Member School Districts. Each of the Member School Districts has a five-member District School Board. The Supervisory Union Board consists of 15 members (three from each Town School District).



As the performance expectations continue to rise and the complexity of needs of students continues to broaden, controlling costs is becoming increasingly more challenging. The current governance structure is complicated, inefficient, and time-consuming at the Central Office level, making it difficult for the Central Office staff to meet obligations to students and taxpayers. There are efficiencies already being realized at the FNESU level—including the Supervisory Union Superintendent, senior administrators, special education, curriculum, policy, transportation, and negotiations with teacher and support staff unions; however, each of the individual school boards separately hires staff, prepares and adopts budgets, and performs many functions that could be streamlined in a merged system.

Proposed Organizational Structure and Governance

The proposed change to the current governance structure would reduce the number of school boards governing schools from five boards to two boards. Enosburg and Richford would merge to create a PK-12 UUSD. Bakersfield, Berkshire and Montgomery would merge to create a PK-12 UUSD.



Priorities and Choices

Currently, non-SU staff are employed at the local School District level; therefore, prioritizing work and deploying resources in order to make more equitable opportunities for students across multiple districts is difficult. For example:

- World Languages courses are available at both high schools, but not at the elementary schools
- Some FNESU schools employ literacy and math interventionists, and some do not (see Appendix I)
- Literacy and Math Instructional coaches support teacher development in some FNESU schools but not in others
- Some FNESU schools have embedded support and intervention blocks in the master schedule, where every child receives either support or enrichment without missing new instruction in the classroom, and some schools primarily utilize pull-out services, whereby students miss first instruction in the classroom in order to receive services
- The amount of instructional time in Art, Music and PE provided at the FNESU elementary and middle levels varies significantly by school (see Appendix G)
- Instructional time allocated for literacy, math, science and social studies varies by school within the FNESU (see Appendix G)
- Experience level of the professional teaching staff varies significantly from school to school within the FNESU (see Appendix I)

At the elementary/middle school level, some schools in FNESU have cut programs for students that could be better maintained by sharing resources with partner schools. Tuitioning Districts often face unexpected and unbudgeted high school tuition cost increases that can be incredibly detrimental to the PK-8 budget, creating the need for significant cuts to occur at that level in order to be able to pay the tuition bill. By merging the governance of the three schools together,

there is some insulation from the spikes in tuition costs, as the burden can be shared across three communities instead of one. Under existing governance structures, some schools have maintained class sizes that are too small to be cost effective but don't have the option of sharing staff to address this problem.

When this governance structure was created, education was simpler and less expensive. Today the rapidly changing educational needs are far more complex and often more expensive. There is a need for a governance structure that allows school boards to address students' needs from the start of their education through their graduation and compels those boards to make wise financial decisions for the entire system in order to maximize educational opportunities in a fiscally effective manner.

Side by Side Merger Unified System

The 706b Study Committee believes students would be better served by a unified system. Two separate boards with input from all local schools would set priorities and allocate resources where needed (regardless of grade or geography) and avoid conflicts or communication breakdowns between different school districts. A unified system would enable administrative staff to focus more on educational quality and less on obtaining or aligning decisions from numerous boards. Resources could also be better shared among schools allowing staff to work more efficiently in a unified system.

Unification would produce a more efficient and cost-effective system by creating one budget instead of three. Boards could better adapt to the ever-changing demands of educating students, which would protect our smaller communities from unpredictable swings in education costs and tax rates.

Unification provides temporary property tax rate reductions and preservation of Small Schools Grants for the communities approving unification. If all necessary communities approve unification, the State will reduce the equalized homestead property tax rates by \$.08 in the first year after unification; \$.06 in the second year; \$.04 in the third year; \$.02 in the fourth year.

Accountability and Local Control

FNESU currently consists of five boards with twenty-five members, a Supervisory Union board with fifteen members, two middle/high schools, two PK-5 schools, three PK-8 schools, and one Career and Technical Center. A unified union governance structure will include two UUSDs: the PK-8 operating/9-12 tuitioning District will have six board members and the PK-12 operating District will have six board members. The FNESU board will consist of six members overseeing the entire PK-12 Supervisory Union, with three members from each new UUSD. The 706b Study Committee believes this new governance structure will result in greater uniformity of

educational expectations and experiences for all students in the new UUSD and will increase teacher, board, and administrative accountability.

Because FNESU is a highly functioning Supervisory Union, it will be relatively easy to make the transition from the current governance structure to a Unified Union system. All FNESU schools are currently governed by unified policies, hire and manage teachers based on the same negotiated master agreement, share in the costs of special education services, and rely on the instructional leadership of the Central Office administration for both curriculum and professional development. As a result, few operational changes will be required to make the shift to a Unified Union structure. Given some of the centralized functions that have been in place for quite some time, local School District Board members have demonstrated their ability to work without prejudice to meet the needs of the collective communities.

This side-by-side merger proposal allows us the opportunity to align our governance structures for all schools in our current Supervisory Union with like structures. This allows Member School Districts that currently tuition students to retain high school choice for all children in those communities. Loss of high school choice in the PK-8 towns was a driving factor in the defeat of the FNESU Full Merger proposal in 2016. Additionally, the current proposal will allow Enosburg and Richford students to access some choice between the Richford and Enosburg High Schools. Previously this was only accomplished through access to the Act 129 School Choice Waiver provision. (See Appendix K for additional clarification of high school choice in the three potentially Merging Districts.)

The proposed unification plan brings five separate Member School Districts together under two UUSD Boards, which will be responsible for the educational programs for all students, PreK-12, at a cost the 706b Study Committee believes will realize some greater efficiencies that tax payers can support. (see Appendix F)

Report Format - This Planning Report uses a template developed by the Vermont Agency of Education. The Articles of Agreement for the proposed district will be submitted to voters on November 28, 2017.

Signature Page

We, the undersigned, recommend to the voters in Bakersfield, Berkshire and Montgomery to support the creation of a UUSD and the adoption of the Articles of Agreement, as part of a Side-by-Side plan involving all five towns in FNESU:

Jean-Marie Clark - Board Member, Bakersfield Jean-Marie Clark
Erin Paquette - Board Member, Bakersfield, Chair Erin Paquette
Lisa Hango - Board Member, Berkshire Lisa Hango
Caroline Elander - Community Member, Berkshire Caroline Elander
Bruce Mercy - Board Member, Montgomery _____
Mary Niles - Board Member, Montgomery Mary Niles

***(Bakersfield Town School District; Berkshire Town School District;
Montgomery Town School District)***

Section 2: Unification Study Committee Report

Bakersfield, Berkshire & Montgomery

September 28, 2017

The Plan

Authorization to engage in this Unified District Planning Committee process was voted in the affirmative by the following boards of directors on the following dates:

Bakersfield Board of Directors, on September 18, 2017

Berkshire Board of Directors, on September 12, 2017

Montgomery Board of Directors, on September 11, 2017

The Secretary of Education was advised of the formation of this UUSD Study Committee, pursuant to Title 16 V.S.A. § 706b, by letter dated September 20, 2017 and in that letter, Jean-Marie Clark was identified as Chairperson of the 706b Study Committee.

Recommended Articles of Agreement, pursuant to the requirements of Title 16, Chapter 11, Subchapter 3, as are set forth herein below, were agreed upon by the 706b Study Committee at its duly warned meeting of October 2, 2017.

Unification Study Committee Membership

Jean-Marie Clark – Bakersfield Board Member

Caroline Elander – Berkshire Community Member

Lisa Hango – Berkshire Board Member

Bruce Mercy – Montgomery Board Member

Mary Niles – Montgomery Board Member

Erin Paquette – Bakersfield Board Member

Introduction

The most significant aspect of this plan is to bring all local schools under the control of two UUSD Boards. This structure provides new opportunities for school leaders to improve student learning opportunities and to find modest cost reductions. It complies with the Act 46 objective that school districts move toward sustainable governance structures that meet statewide educational and fiscal goals, and it allows the UUSDs to take advantage of Vermont tax reduction incentives and consolidation funding.

Following are Articles of Agreement which determine how the new governance structure will operate. If unification is approved, the UUSD will be formed when all legal 706g certifications have been filed (likely by January 15, 2018) and then will begin to transition to full operation,

effective July 1, 2019. The existing School Districts and Boards, will remain in existence after June 30, 2019 for the sole purpose of completing any business not given to the UUSDs.

If voters in one of the “necessary” Member Districts (Berkshire and Bakersfield) do not approve unification, the proposal fails and all current governance structures continue to operate. Act 46 and Act 49 require that districts who do not take action to voluntarily merge by July 1, 2019 may be subject to financial and other consequences as listed below:

- Districts that do not engage in voluntary structural changes will not be able to secure tax rate reductions;
- After July 1, 2019, these districts will only be able to retain their Small Schools Grants if the State Board determines they are geographically isolated or can demonstrate academic excellence and operational efficiency;
- After July 1, 2020, these districts will also lose any 3.5% ADM hold-harmless protection;
- Act 46, Sec. 10 requires the State Board to issue a final statewide plan by November 30, 2018 that will require, to the extent possible, the merger and realignment of districts and supervisory unions into sustainable governance structures where necessary to meet statewide educational and fiscal goals.
- If voters in the necessary districts approve the voluntary merger plan, but the “advisable” Member District (Montgomery) does not approve the plan, the merger is approved, but Montgomery will not be included in the merger. Montgomery would continue to operate as it does today and will be subject to some or all of the consequences listed above.

ACT 46 Goals

Act 46 is intended to move the State of Vermont toward sustainable models of education governance. It is designed to encourage and support local decisions and actions. The following list summarizes ways in which this plan addresses Act 46 goals.

Goal #1: To provide substantial equity in the quality and variety of educational opportunities

Our proposed UUSD will result in:

- Increased consistency and equity of opportunity by having a single board:
 - A single mission statement / unified vision
 - A single strategic plan
 - Continued consistency in curriculum development
 - Consistency in Common PK-8 Assessment Plan

- Consistency in delivery of student support systems
- Increased ability of administrators to focus on engaging in visionary and collaborative instructional leadership
- Increased program options in specialized courses such as World Languages, Algebra, Coding, etc. Students could potentially participate remotely or staff could travel to offer courses in any of the schools
- Increased efficiency in supporting the training of new teachers in currently existing initiatives and programs, ensuring more consistency and fidelity
- Increased opportunities, not only in core subjects, but also in extracurricular and extended school year programs and activities
- Increased ability to equalize class sizes across the system through flexibility of teacher assignments (ability to flexibly split very large classes or combine very small classes into potential multi-age/grade configurations)
- A commitment to preserving the character and unique culture of each school
- The ability to share resources and staff expertise among all schools
- Increased flexibility for movement of students among schools in certain situations as determined by the UUSD Boards
- Increased opportunities for preschool programs to extend learning beyond the minimum 10 hours per week and provide more equitable access to students in each Member School

Goal #2: To lead students to meet or exceed the State's Education Quality Standards

This will:

- Continue to ensure consistency in curriculum development
- Provide greater consistency in delivery of Multi-Tiered Systems of Supports (MTSS)
- Enhance the ability to recruit and retain skilled teachers with a shared staffing model in the three schools; teacher turnover is quite high in this Supervisory Union, and any stability that can be created increases the experience level of staff which will benefit student learning outcomes
- Provide for an opportunity to utilize interventionists and instructional coaches in all schools
- Coordinate opportunities for students in all schools to provide accelerated learning opportunities
- Coordinate high-quality professional development opportunities through access to the in-house expertise that exists within the UUSD
- Continue to standardize common curriculum goals and assessment priorities among the PK-8 schools
- Ensure consistency of technology access for all PK-8 students (see Appendix H)
- Continue to develop a Proficiency Based Learning system in our PK-8 schools
- Continue to align Proficiency Based Graduation Requirements for middle schools and Transferrable Skills in all PK-8 schools

- Continue to develop a system of building Personalized Learning Plans for all students grades 7-8 in the UUSD

Goal #3: To maximize operational efficiencies through greater flexibility to manage, share, and transfer resources

The Franklin Northeast Supervisory Union has already realized many operational efficiencies by:

- Centralizing special education services for all students
- Centralizing transportation services
- Centralizing collective bargaining for professional staff
- Aligning policies and procedures
- Streamlining the accounting system

The approved voluntary merger and creation of a UUSD between the three PK-8 schools (Bakersfield, Berkshire and Montgomery) would allow the UUSD to:

- Eliminate the need to develop and approve three separate budgets
- Reduce the number of state and federal reports
- Eliminate the intergovernmental accounting transactions within the new UUSD
- Permit greater sharing of both teaching and non-teaching staff at the district level. Sharing could allow for increased opportunity for formerly part-time positions in multiple districts to be one full-time position in the UUSD
- Increase ability to offer more equitable class sizes across our new system through flexibility of staff assignments
- Support consolidated efforts in curriculum, instruction, transportation, delivery of student support systems, and overall finance operations
- Maximize operational efficiencies through the flexibility to manage, share, and transfer resources as part of a joint contract which might include:
 - A system to share resources to manage building and grounds, including:
 - Expanded centralized purchasing in areas such as cleaning supplies, heating oil, school supplies and technology
 - Streamlined supervisory union level support of one board rather than three
 - A single budget = fewer audits (one audit instead of three)
 - Savings when purchasing “teacher/student count” subscriptions, and other instructional materials, bulk mailings, etc.
 - Centralized contracts = consistency in wages and working conditions

Goal #4: To promote transparency and accountability

FNESU currently consists of five boards with a total of twenty-five members, a Supervisory Union Board with fifteen members, two middle/high schools, two PK-5 schools, three PK-8 schools, and one Career and Technical Center. A Unified Union governance structure will include two UUSDs: the PK-8 operating / 9-12 tuitioning District will have six board members,

and the PK-12 operating District will have six board members. The Supervisory Union Board will consist of six members overseeing the entire PK-12 Supervisory Union, three from each UUSD. The 706b Study Committee believes this new governance structure will result in greater uniformity of educational expectations and experiences for all students and will increase teacher, board and administrative accountability by:

- Increasing community participation and voice in the electoral process by establishing a uniform date and consistent method of voting in the three communities and holding three separate informational meetings, one in each town. Under the Articles of Agreement of the UUSD, the vote will occur by Australian ballot on Town Meeting Day. This is a change from the current system where two towns, Bakersfield and Berkshire, vote by Australian ballot on Town Meeting day and one town, Montgomery, votes from the floor a week later at a separate Annual School Meeting
- Decreasing the number of boards allows for:
 - transparency among the three schools
 - SU level administrators' ability to focus on schools and leadership
- Having equal representation for each community, with voters from all three towns voting on board members from all communities adds another layer of accountability. Community members will have an individual voice at the polls to acknowledge the work that board members are doing to demonstrate a collective responsibility for all students' PK-12 in all three communities
- Establishing structures to support community and family engagement, including the potential for the establishment of Community Advisory Councils in each community

Goal #5: To deliver education at a cost that parents, voters, and taxpayers value

The proposed plan:

- Reduces the number of annual audits and the associated costs from three to one
- Streamlines accounting systems (e.g., one budget instead of three)
- Increases purchasing power
- Shares resources to manage building and grounds
- Maintains Small School Support Grants in the form of Merger Support Grants for Bakersfield and Montgomery
- Maintains 3.5% hold harmless protection (It would be less likely to trigger this provision with the combined enrollment numbers in the PK-8 schools)
- Allows communities to access the tax rate reductions for the first four years of consolidation in order to buffer the transition to a single tax rate in these three communities. (This is temporary relief and is not a driving force behind this decision to consolidate)
- PK-8 budgets are heavily driven by predictions of high school enrollment and residency of those same students. In a combined budget, there would be no need to budget for the same student in high mobility situations in more than one budget. Those fluctuations

would have less impact on the programming in any one school because the burden would be softened by sharing with partner districts

Section 3: Warning and Articles of Agreement (Bakersfield, Berkshire & Montgomery)

The form of the article to be submitted to the voters appears below:

ARTICLE I

Shall the _____ Town School District, found to be (necessary or advisable) to be included in the proposed Franklin Northeast PK-8 Unified Union School District (UUSD), join with the _____ Town School District, found to be necessary to include in the proposed Franklin Northeast PK-8 Unified Union School District, and with the _____ Town School District, found to be (necessary or advisable) to include in the proposed Franklin Northeast PK-8 Unified Union School District, for the purpose of forming a UUSD, as provided in Title 16, Vermont Statutes Annotated, upon the following conditions and agreements:

- a) **Grades.** The Franklin Northeast PK-8 Unified Union School District shall operate schools to provide for the education of all legal pupils of the towns who are members of the Franklin Northeast PK-8 Unified Union School District for grades PreK through 8, and shall pay tuition to provide for the education of all legal pupils who are members of the Franklin Northeast PK-8 Unified Union School District for grades 9 through 12.
- b) **Board of School Directors.** The forming town district's representation on the Franklin Northeast PK-8 Unified Union School District Board will be determined as an at-large hybrid model. Two seats on the Franklin Northeast PK-8 Unified Union School District Board are apportioned to each town. Apportionment does not have to be proportional to the town's population. All voters in all member towns vote on the same slate of candidates. The ballot is categorized to represent each town's apportioned seats on the Franklin Northeast PK-8 Unified Union School District Board.
- c) **School Closing.** No school shall be closed, or building grade configuration changed, without an affirmative vote of the Franklin Northeast PK-8 Unified Union School District Board, and an affirmative vote of the town in which the school is located.
- d) **Assumption of Debts and Ownership of School Property.** The Franklin Northeast PK-8 Unified Union School District shall assume the indebtedness of Member Districts, acquire the school properties of Member Districts, and pay for them, all as specified in the final report.
- e) **Final Report.** The provisions of the Final Report approved by the State Board of Education on the 18th day of October, 2017, which is on file in the town clerk's office, shall govern the Franklin Northeast PK-8 Unified Union School District.

ARTICLE II

To elect from the following nominees six school director(s) to serve on the proposed Franklin Northeast PK-8 Unified Union School District Board from the date of the organization meeting for terms as provided in the final report:

One (1) school director for a one-year term, ending March 2019,
who resides in the Town of Bakersfield

One (1) school director for a one-year term, ending March 2019,
who resides in the Town of Montgomery

One (1) school director for a two-year term, ending March 2020,
who resides in the Town of Bakersfield

One (1) school director for a two-year term, ending March 2020,
who resides in the Town of Berkshire

One (1) school director for a three-year term, ending March 2021,
who resides in the Town of Berkshire

One (1) school director for a three-year term, ending March 2021,
who resides in the Town of Montgomery

Articles of Agreement Bakersfield, Berkshire, and Montgomery

The 706b Study Committee recommends that the following Articles of Agreement be adopted by each Member School District for the creation of a pre-Kindergarten through Grade 12 District that would provide for education in Grades PK-8 by operating a school or schools and provide for education in Grades 9-12 by paying tuition to be named before the operation commencement date, and with public input, hereinafter referred to as the “Franklin Northeast PK-8 Unified Union School District (UUSD)”.

Article 1: Necessary Districts

The School Districts of Bakersfield and Berkshire are necessary for the establishment of the Franklin Northeast PK-8 UUSD.

The Montgomery School District is advisable to include in the formation of the Franklin Northeast PK-8 UUSD. There are no additional school districts being recommended at this time.

The Franklin Northeast PK-8 UUSD shall be established by approval of an article to be submitted to the voters of the Bakersfield, Berkshire, and Montgomery Town School Districts at special meetings to be held on November 28, 2017. The article shall be adopted and a new district shall be created if approved by a majority of the electorate voting in each special meeting in each of the districts identified as “necessary” above, and by any “advisable” district that also votes in the affirmative.

In the event that the Montgomery Town School District votes not to join the Franklin Northeast PK-8 UUSD, it will have until November 28, 2018, to reconsider and have an affirmative vote from the town voters to join the UUSD with admission granted in advance by the Franklin Northeast PK-8 UUSD. For the purpose of compliance with 16 V.S.A. § 721, the UUSD consents to Montgomery’s admission until November 29, 2018. Thereafter, by adopting these articles, the Franklin Northeast PK-8 UUSD consents to the admission of any PK-8 operating /9-12 tuitioning school district within or bordering Franklin Northeast Supervisory Union that is directed to merge with the Franklin Northeast PK-8 UUSD by the State Board of Education’s final statewide plan issued as required by state law. Except as provided in the first sentence of this paragraph, any voluntary request, initiated by either the UUSD or a non-Member School District shall follow the procedures outlined in 16 V.S.A. § 721.

The Franklin Northeast PK-8 UUSD shall commence operating the above-mentioned schools on July 1, 2019 (“Operation Commencement Date”) provided this article shall have become effective by such date.

Article 2: Grades to be Operated

The Franklin Northeast PK-8 UUSD shall operate schools to provide for the education of all legal pupils of the towns who are members of the Franklin Northeast PK-8 UUSD for grades PreK through 8, and shall pay tuition to provide for the education of all legal pupils who are members of the Franklin Northeast PK-8 UUSD for grades 9 through 12.

The Franklin Northeast PK-8 UUSD Board will develop policies and procedures for intradistrict choice for PK-8 students prior to the 2020/2021 school year.

Article 3: School Facilities

No new schools or major renovations to existing school facilities are necessary to, or proposed for, the formation of the Franklin Northeast PK-8 UUSD.

Article 4: Initial Operations

The Franklin Northeast Supervisory Union (FNESU) will continue to provide, and/or contract for, any transportation, curriculum, special education services, and food service, which is to be provided for publicly funded students attending Franklin Northeast PK-8 UUSD schools in accordance with policies adopted by the FNESU Board .

The Franklin Northeast PK-8 UUSD Board will honor all pre-existing master agreements and individual employment contracts that are in place for the Merging School Districts on or before the Operation Commencement Date and shall comply with 16 V.S.A. chapter 53, subchapter 3 regarding transition of employees. These master and individual agreements will continue until their respective termination dates.

The Franklin Northeast PK-8 UUSD Board shall provide timely and sufficient opportunity for local input on policy and budget development. Structures to support and encourage public participation within the UUSD will be established by the Franklin Northeast PK-8 UUSD Board on or before January 1, 2019.

Article 5: Special Funds and Debt

Any and all operating deficits and/or surpluses and fund balances of any of the Merging Districts shall become the property, and/or the obligation of the Franklin Northeast PK-8 UUSD, on the Operation Commencement Date.

Any and all capital debt of any of the Merging Districts shall become the property, and/or the obligation of the Franklin Northeast PK-8 UUSD, on the Operation Commencement Date.

Any and all endowments of other restricted accounts of any of the Merging Districts shall become the property, and/or the obligation of the Franklin Northeast PK-8 UUSD, on the Operation Commencement Date.

Article 6: Property

The Merging Districts will convey to the Franklin Northeast PK-8 UUSD all of their school-related real and personal property, for One Dollar, and the Franklin Northeast PK-8 UUSD will assume all capital debt associated therewith, on or after the effective date of this article but prior to the Operation Commencement Date. The Franklin Northeast PK-8 UUSD recognizes the long term financial investments and community relationships that each town has with its school properties. The Franklin Northeast PK-8 UUSD Board will encourage use of each building by the students and community according to the policies and procedures of the Franklin Northeast PK-8 UUSD Board.

No school shall be closed, or building grade configuration changed, without an affirmative vote of the Franklin Northeast PK-8 UUSD Board, and an affirmative vote of the town in which the school is located.

In the event that, and at such subsequent time as, the Franklin Northeast PK-8 UUSD Board determines that any of the real property, including land and buildings, conveyed to it by one or more of the Merging Districts is or are unnecessary to the continued operation of the Franklin Northeast PK-8 UUSD and its educational programs, the Franklin Northeast PK-8 UUSD shall convey such real property, for the sum of One Dollar, and subject to all encumbrances and debt to the town in which it is located. The conveyance of any of the above school properties shall be conditioned upon the town owning and utilizing the real property for community and public purposes for a minimum of five years. In the event a town elects to sell the real property prior to five years of ownership, the town shall compensate the Franklin Northeast PK-8 UUSD for all capital improvements and renovations completed after the formation of the Franklin Northeast PK-8 UUSD and before the sale to the town. In the event a town elects not to acquire ownership of such real property, the Franklin Northeast PK-8 UUSD shall, pursuant to Vermont Statutes, sell the property upon such terms and conditions as established by the Franklin Northeast PK-8 UUSD Board .

Article 7: Composition of Board of Directors

The Merging District’s representation on the Franklin Northeast PK-8 UUSD Board will be based on an at-large hybrid model. Two seats on the Franklin Northeast PK-8 UUSD Board are apportioned to each town. Apportionment does not have to be proportional to the town’s population. All voters in member towns vote on the same slate of candidates. The ballot is categorized to represent each town’s apportioned seats on the Franklin Northeast PK-8 UUSD Board .

If all districts approve unification, the initial membership on the six (6) member Franklin Northeast PK-8 UUSD Board will be as follows:

- Bakersfield: 2
- Berkshire: 2
- Montgomery: 2

If only the two necessary districts approve unification, the initial membership on the four (4) member Franklin Northeast PK-8 UUSD Board will be as follows:

- Bakersfield: 2
- Berkshire: 2

Article 8: Election and Terms of Office for Board of Directors

The Franklin Northeast PK-8 UUSD Board will be elected by Australian Ballot at the UUSD Annual meeting for three-year terms, except for those initially elected at the time of the formation of the Franklin Northeast PK-8 UUSD. On the initial Franklin Northeast PK-8 UUSD Board, School Director terms of office will be as follows:

If all districts approve unification, the following terms of office will take effect:

Distribution of Initial One-Year, Two-Year and Three-Year Terms

Town	1 Year Term (Ending March, 2019)	2 Year Term (Ending March, 2020)	3 Year Term (Ending March, 2021)
Bakersfield	1	1	
Berkshire		1	1
Montgomery	1		1

If only the two necessary districts approve unification, the following terms of office will take effect:

Distribution of Initial One-Year, Two-Year and Three-Year Terms

Town	1 Year Term (Ending March, 2019)	2 Year Term (Ending March, 2020)	3 Year Term (Ending March, 2021)
Bakersfield	1	1	
Berkshire		1	1

Nominations for apportioned seats will come from each town’s voters. Nominations will be obtained from the voters of that town pursuant to 16 V.S.A. § 706e(b). Directors will be elected by the electorate of the UUSD by Australian Ballot. Board members will represent all voters of the UUSD at-large.

Article 9: Vote on the Formation of the UUSD

As required by law, the initial Franklin Northeast PK-8 UUSD Board will be elected on the same date, November 28, 2017. Nomination petitions must be filed not less than 30, nor more than 40, days prior to the November 28 election in the manner that follows. Nominations for the office of School Director representing a town shall be made by filing with the clerk of that town, 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.

Article 10: Transition Provisions

The Merging Districts shall remain in existence after June 30, 2019 for the sole purpose of completing any business not given to the Franklin Northeast PK-8 UUSD under these articles. Such business shall be completed as soon as practical, but in no event any later than March 2, 2020, at which time the Merging District Boards will be dissolved and the Merging Districts shall cease to exist.

The Franklin Northeast PK-8 UUSD Board shall propose annual budgets in accordance with 16 VSA Chapter 11.

The annual budget vote shall be conducted by Australian ballot as per 17 VSA Chapter 55.

If, after one year of operation, a Merging District wishes to withdraw from the Franklin Northeast PK-8 UUSD, processes outlined in 16 V.S.A. §724 will be followed.

Article 11: Operation Commencement Date for the Unified Union School District

The Franklin Northeast PK-8 UUSD shall commence full educational operations on July 1, 2019. Upon an affirmative vote as set forth in Article 1, and upon compliance with 16 V.S.A. § 706g, the Franklin Northeast PK-8 UUSD shall have and exercise all of the authority which is necessary in order for it to prepare for full operation beginning on July 1, 2019.

Appendix A: Cost Benefit Analysis

Efficiencies will be gained through the creation of the Franklin Northeast PK-8 UUSD in the following areas:

Improved student opportunities and outcomes

Currently elementary and middle school choice is available only if the sending school board or the family agrees to pay tuition. In a UUSD, the UUSD Board may elect to provide greater options for students and parents. The possibilities in this area are extensive. Policies and procedures could be written and revised to respond to exceptional circumstances and the needs of students, schools and communities. Currently, in FNESU, tuition is required for students to enroll in elementary schools outside of their town of residence. The flexibility and ability to avail school choice opportunities for elementary students and families has the potential to expand educational options. FNESU serves a transient population of students in this part of Franklin County. Having the ability to allow students to finish the year at their home school after a move could have a positive effect on individual students who move and often experience several months of regression in a new school environment. In addition, boards could choose to allow students who have been victims of bullying or harassment the option to enroll in a neighboring school.

Students in Bakersfield, Berkshire and Montgomery would retain all the benefits of the current School Choice provision. (see Appendix K)

Formation of the Franklin Northeast PK-8 UUSD would allow for flexibility in the use of facilities and resources. The UUSD Board would be empowered to use all personnel, facilities and financial resources within the District to support all students and educational programs.

A UUSD would allow staff to be moved from one school to another in order to meet the needs of the student population and to take advantage of staff expertise. Currently, the local School District employs the majority of staff. This significantly limits the administration's ability to adjust staffing based on academic and social data. Because the current governance structure does not enable the transfer or sharing of staff between districts, districts make additional hires in response to needs that arise within their current district instead of studying the entire organization to identify existing staff that could be reassigned. This is a cultural shift that has the prospect of saving significant money; a UUSD provides greater staff stability and reduces the need to hire and train new staff.

Some examples include:

- Sharing staff to provide enhanced opportunities like World Languages at the elementary and middle school levels
- Sharing Instructional Coaching and Intervention staff
- Having flexibility to share facilities for:

- Community events conflict
- Sporting events
- Space or resources for a specialized Alternative program
- Sharing resources or equipment
 - Expensive STEAM/Robotic equipment
 - PE equipment like heart rate monitors

More equitable programming opportunities for all students within Franklin Northeast could be advanced with the formation of the two UUSDs. Currently, resources, offerings, staffing and supplemental support varies across FNESU. Two UUSDs would reduce or eliminate the disparities in support services, staffing and programs that now exist (e.g. some schools have an enrichment program, others do not; instructional support varies among school districts; supplemental support is not equivalent or allocated based on SU-wide factors; infrastructure funding differs from school district to school district and can vary year-to-year dependent on external factors out of the local school district's control). Vermont requires that school systems provide substantial equity in the quality and variety of educational opportunities. Unification helps us to comply with state law in a way that is cost-effective.

Technology

The use of technology as a teaching and communication tool has expanded exponentially in the latter portion of the 20th Century and early part of the 21st Century. Parents, colleges/universities, and employers are expecting students to be computer literate. Students must have strong technology skills and understand how to apply those skills in the workplace. All students must have equal opportunity and support in developing technology skills for the successful transition to the work force or higher education. (see Appendix H)

FNESU currently has a Director of Technology who oversees our technology systems; however, the quality and quantity of support and infrastructure is different in each building and district. The ability to perform these functions in an effective and efficient manner is significantly influenced by the variances in equipment, building support personnel, and software within FNESU schools. The creation of two UUSDs increases the likelihood of resources being distributed more evenly and provides flexibility in the allocation of resources (material and human) based on necessity. This could reduce the down-time for a school that might face a network issue or find themselves short a computer for a new student who could access a resource in a partner school. Most FNESU schools have IT specialists who work part-time, and a couple schools have staff more able to serve as Technology Integration Specialists. Having the flexibility to share this resource among schools could help raise the bar in terms of teachers having the knowledge needed to maximize understanding of how student devices can be used in ways that can redefine how students learn and communicate that knowledge.

In terms of cost savings, there is greater purchasing power in two larger districts than in our five

smaller districts. Savings are anticipated on some software licenses that offer district pricing or per user pricing models when the number purchasing it is greater.

Again, Vermont requires that school systems provide substantial equity in the quality and variety of educational opportunities and this is something that the local School Boards, 706b Study Committee Members, and administrators feel strongly about. Unification helps us comply in a way that is cost-effective.

Teacher staffing

As mentioned earlier in the report, flexibility in determining staffing levels empowers a UUSD to adjust staffing assignments based on need, current demographic realities, and staff expertise. This authority also has the potential to save money and intensify continuity and coordination of personnel. Often, School Districts are faced with the choice of reducing staff because of a shift in student population, while a neighboring School District is considering adding staff. These decisions are often complicated because from year-to-year, grade-level populations ebb and flow. Administrators and School Boards frequently deliberate about reducing, adding, or maintaining staffing levels, when faced with these grade level enrollment fluctuations. The ability to move teachers from one school to another has the prospect of improving continuity and saving money because the UUSD would have the option of assigning staffing levels based on annual needs.

An additional benefit of the Franklin Northeast PK-8 UUSD's ability to assign staff is that district's realization of its investment in training newly-hired employees. School-based training and mentoring involves a considerable investment in time and money; keeping teachers in the system enables the Franklin Northeast PK-8 UUSD communities to realize the full potential of its financial commitment. This is especially important in FNESU where only 61% of teachers have more than five years' teaching experience. Full-time teaching openings attract a more qualified pool of candidates than part-time positions. There continues to be difficulty in recruiting and retaining new teachers given FNESU's geographically isolated location and economically depressed communities. The 706b Study Committee believes it will build a more sustainable teaching staff in a UUSD than is possible within the current governance structure.

Non-teacher staffing

Many of the efficiencies and benefits pertaining to teaching staff also relate to non-teaching staff members. In the two UUSDs, the UUSD Boards would have the ability to shift and use personnel based on student population, student needs, staff needs, programming changes, building renovations and staff certifications (e.g. Master Electrician License, Master Plumber License, HVAC License, Athletic Trainer Certification, Counseling License etc.). This will reduce the need to contract with outside service providers. Furthermore, it is a more efficient and cost-effective method of aligning personnel to requirements, responsibilities, and obligations.

Student data collection and reporting

Collecting, reporting and analyzing student data across PreK-12 systems in FNESU would continue to support the coordination, continuity and responsible allocation of resources throughout the organization. Results will be analyzed at the school, district and Supervisory Union levels. The analysis will look at grade level performance over time, cohort performance over time and most importantly, individual student growth over time. That analysis will allow leaders to effectively create comprehensive needs assessments and continuous school improvement plans at the school, district and Supervisory Union level. A variety of student assessment results will be used in order to broaden the lens to a system level with the goal of providing more substantial equity in the quality and variety of educational opportunities to lead students to meet or exceed the State's Education Quality Standards.

Financial, accounting and budgeting (Central office functions)

The formation of the two-District model will streamline accounting systems by creating two single budgets and reducing the bill-backs required when employees or contracts are shared by more than one district. Central office will ultimately be processing fewer checks.

There would be one treasurer for each of the UUSDs, resulting in reduced services required from town offices. Budget proposals would be prepared at the school level. One final budget would be developed to be presented to voters by each of the UUSD Boards. Three commercial audits would be conducted (compared to the six audits that are currently being prepared and audited). This would result in savings of \$20,000. The UUSDs would be required to submit one statistical report and staff census each to the state, creating considerable saving in staff time. These changes greatly promote transparency and accountability, as required by Act 46.

FNESU has made a sizeable investment in new accounting/human resources software. The hybrid nature of incurring costs and distributing revenue between the local School District and the SU complicates the accounting process. The current structure inhibits the efficient functioning of this business software. It is anticipated that this new governance structure will significantly reduce redundancies at the Central Office.

As two UUSDs, coordination and implementation of benefits will be more manageable. Determination of benefits (e.g. insurance, seniority, participation in retirement systems), eligibility would be more transparent and clear. This is a major benefit to employees, as well as office personnel charged with tracking employee records.

When submitting grants, viewing the UUSDs as larger entities presents a stronger case due to combined enrollments. Student population is often a criterion in competitive grant opportunities, and some grants will not allow multiple districts to apply. Combining School Districts increases our ability to apply for grants.

The reductions in duplication of work and ability to reallocate staff would increase efficiency. For example: There could be one facilities director for the UUSD with school level positions being reallocated or eliminated as deemed appropriate.

Improved utilization of buildings and sport facilities

Buildings could be utilized to support programs in any school when/as necessary. Sports teams could be combined in the UUSDs when lower enrollment is a concern (e.g. ski teams, tennis, golf, snowboarding, etc.)

Centralized contracting

Special education services are already a centralized function. This centralization allows for special education resources to be used in a manner that hasn't previously existed. The challenge in FNESU has been serving high needs students in individual School Districts. By combining resources and students, a unified system could develop programs serving similar students with intensive needs and from multiple schools. Given this capacity, FNESU will be able to significantly reduce the number of students requiring intensive contracted Tier 3 supports from outside sources within the schools and in out-of-district placements. A reduction in contracted behavioral supports, transportation costs, and tuition expenses is anticipated.

Given the fluctuations of student population and local budgets, individual School Districts currently struggle to provide the necessary human resources and fiscal stability that two UUSDs could establish and maintain over time.

FNESU currently contracts for fuel and most food purchases. These joint efforts have been very successful and have provided significant savings. The UUSDs could expand our ability to contract with single providers for selected services (e.g. trash removal, supplies). This is difficult to do now given board priorities and budget constraints at the individual School District level.

FNESU presently has a Supervisory Union wide collective bargaining agreement. The transition to two UUSDs would be simplified by the agreement already in place. FNESU staff members already have shared language for all elements of the Master Agreement including; work day/work year, leave, salary, insurance, etc.

Paraeducators would become one bargaining unit. This would simplify administration and therefore, schools would not be competing with each other to fill local support staff positions.

Transportation

The transportation contract has been centralized and taken on as a Supervisory Union function. Maximizing the efficiency of our transportation system will continue to be a priority.

Food service

Local boards have already agreed to begin working to further centralize the food service programs within FNESU beginning in the 2018/2019 school year.

Board operations

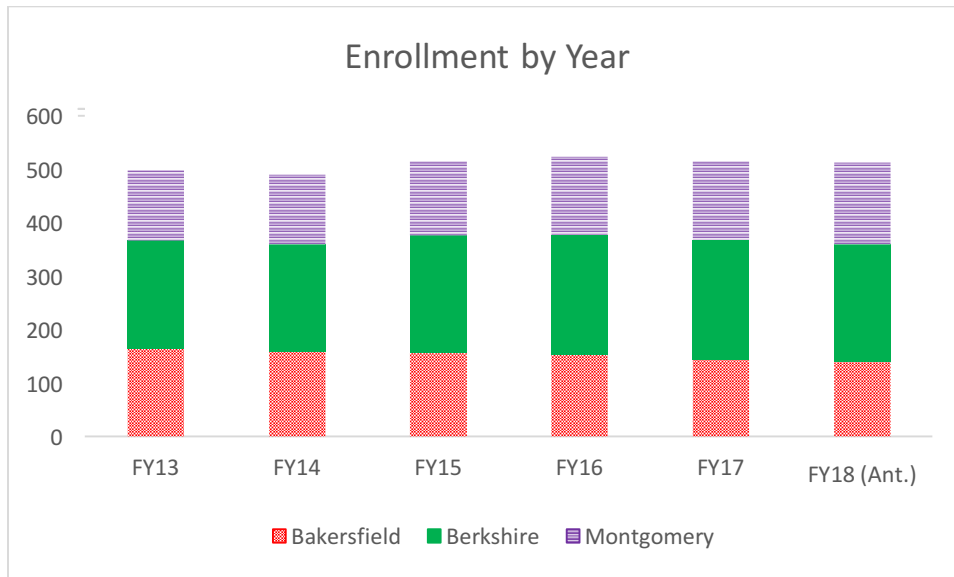
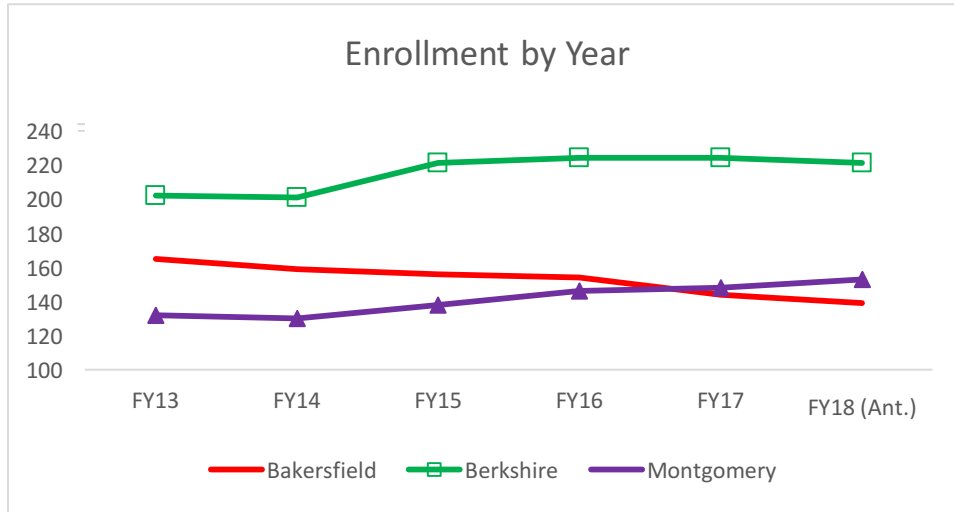
Currently, FNESU has 25 district board members (five from each School District). The FNESU Board is made up of 15 board members (three from each of the five districts). Each board member receives an annual stipend. Current board stipends range from \$450 to \$1,500 annually, with most receiving between \$500 and \$1,000. In a UUSD structure, there will be six board members. The following is one example of potential Board Operations savings: In the UUSD, if a six-member board were to set a stipend at \$1,000/yr., board consolidation would result in a net savings of \$3,050 over the current districts' total.

Appendix B: Demographic and Financial Data

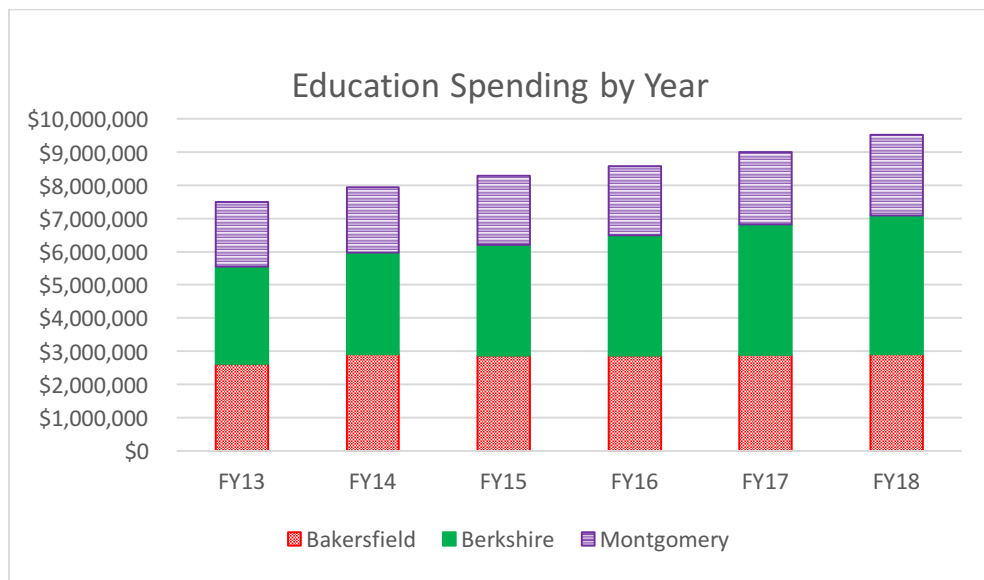
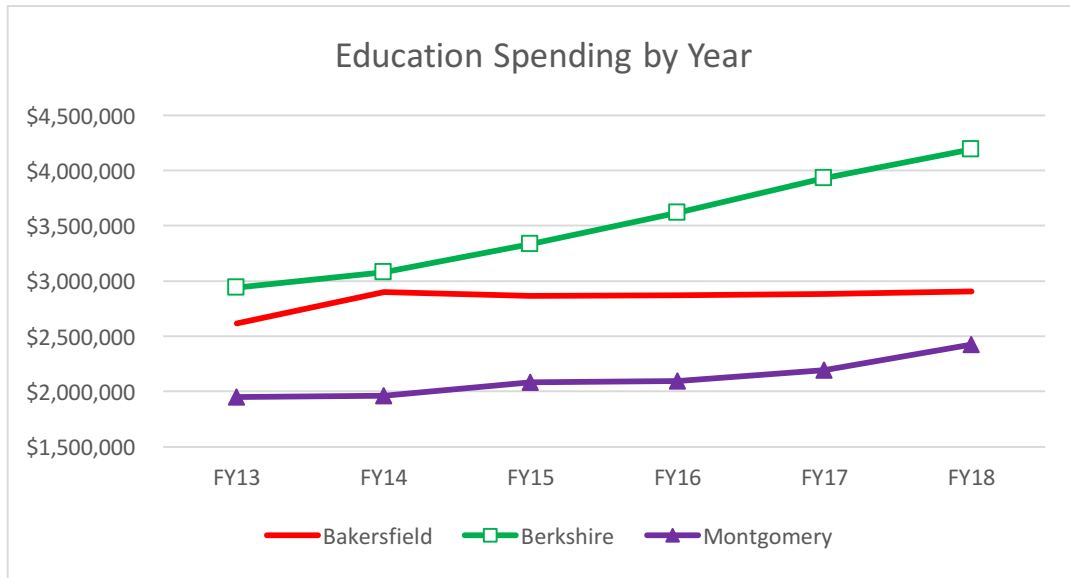
Bakersfield Elementary School						
Grade	FY13	FY14	FY15	FY16	FY17	FY18 (Ant.)
Pre-K3	9	8	11	12	14	14
Pre-K4	14	9	11	12	9	9
K	15	18	8	19	12	9
1	10	15	16	8	19	12
2	19	10	14	14	8	19
3	19	18	11	15	12	8
4	12	17	18	8	16	12
5	18	14	17	18	9	16
6	18	17	15	15	18	9
7	15	18	17	15	13	18
8	16	15	18	18	14	13
Total:	165	159	156	154	144	139

Berkshire Elementary School						
Grade	FY13	FY14	FY15	FY16	FY17	FY18 (Ant.)
Pre-K3	6	8	7	12	8	8
Pre-K4	11	15	18	11	16	16
K	20	17	17	22	24	16
1	18	16	21	17	20	24
2	23	16	17	17	17	20
3	34	23	21	21	17	17
4	19	32	28	18	22	17
5	17	19	33	30	20	22
6	15	19	20	35	29	20
7	20	16	18	20	32	29
8	19	20	21	21	19	32
Total:	202	201	221	224	224	221

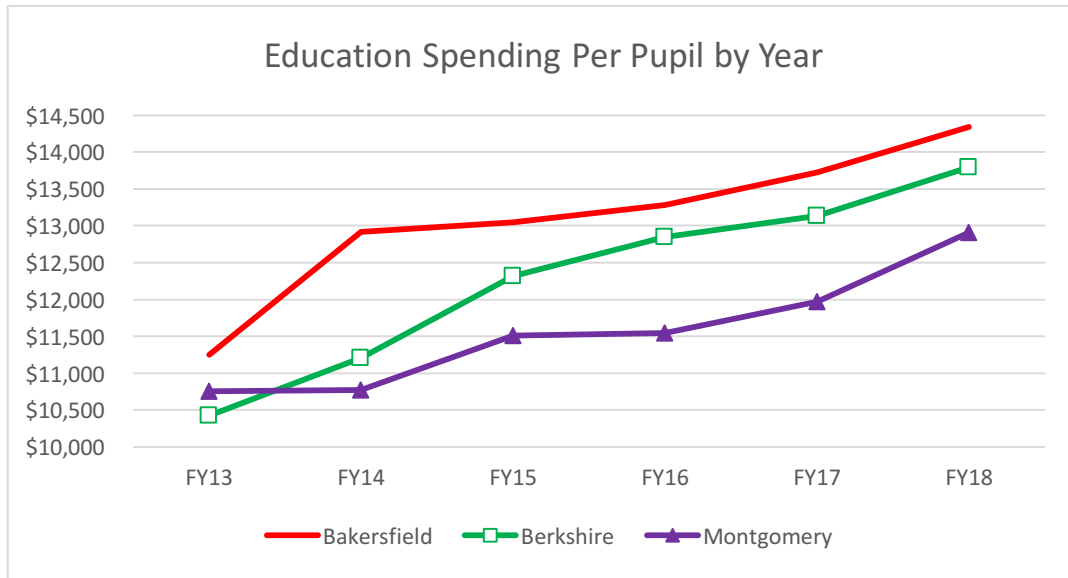
Montgomery Elementary School						
Grade	FY13	FY14	FY15	FY16	FY17	FY18 (Ant.)
Pre-K3	8	8	9	9	16	16
Pre-K4	10	10	11	10	11	11
K	13	11	12	15	12	12
1	10	15	13	14	15	12
2	14	11	16	14	19	15
3	7	11	13	18	13	19
4	9	10	14	13	16	13
5	17	8	15	14	13	16
6	10	16	9	14	13	13
7	17	11	17	7	13	13
8	17	19	9	18	7	13
Total:	132	130	138	146	148	153



Enrollment	FY13	FY14	FY15	FY16	FY17	FY18
Bakersfield	165	159	156	154	144	148
Berkshire	202	201	221	224	224	218
Montgomery	132	130	138	146	148	148
Total	499	490	515	524	516	514



Education Spending	FY13	FY14	FY15	FY16	FY17	FY18
Bakersfield	\$2,616,580	\$2,898,967	\$2,865,119	\$2,870,270	\$2,884,223	\$2,908,285
Berkshire	\$2,939,687	\$3,081,342	\$3,336,187	\$3,620,890	\$3,932,049	\$4,191,227
Montgomery	\$1,951,162	\$1,961,511	\$2,083,314	\$2,093,221	\$2,191,491	\$2,424,602
Total	\$7,507,429	\$7,941,820	\$8,284,620	\$8,584,381	\$9,007,763	\$9,524,114



Ed Spending PP	FY13	FY14	FY15	FY16	FY17	FY18
Bakersfield	\$11,252	\$12,918	\$13,044	\$13,278	\$13,728	\$14,344
Berkshire	\$10,421	\$11,204	\$12,319	\$12,847	\$13,136	\$13,794
Montgomery	\$10,750	\$10,767	\$11,509	\$11,544	\$11,969	\$12,911

	Equalized Pupils	Ed Spending	FY18 Equalized Residential Rate			CLA	FY18 Local Residential Rate		
			Actual	If Merged	If Merged w/incentives		Actual	If Merged	If Merged w/incentives
BAKE	202.75	\$2,908,285	\$1.4118	\$1.3496	\$1.2696	98.57%	\$1.4323	\$1.3692	\$1.2880
BERK	304.04	\$4,191,227	\$1.3568	\$1.3496	\$1.2696	103.06%	\$1.3165	\$1.3095	\$1.2319
MONT	187.8	\$2,424,602	\$1.2707	\$1.3342	\$1.2542	100.46%	\$1.2649	\$1.3281	\$1.2485

Appendix C: Advantages for Students

There are many advantages for students in a UUSD, including:

- Expanded course offerings
 - Algebra, World Languages, Coding, etc.
- Sharing of resources;
 - Expensive 3D printers
 - Science equipment
 - robotics
 - digital microscopes
 - or technology tools
- Sharing staff expertise between schools in UUSD
 - Instructional Coaches working to develop expertise across the UUSD
 - Intervention and Enrichment staff
- Flexibility of movement of students among schools
 - Transient Students
 - Victims of Bullying/Harassment
- Increased access to extended school year services and programs
- Shared staffing model will allow:
 - Students to benefits from courses offered in other schools
 - More job security for teachers; allowing us the opportunity to better retain teachers in the UUSD; teacher experience and expertise significantly impacts student learning
- Shared resources for children with exceptional needs
 - Staff consultation
 - Specialized services
 - In-house vs. Out of District specialized programs

Appendix D: Status of Facilities, Debt, Reserve Funds

The charts below and on the following pages display the major projects pending, the current indebtedness, and the current reserve funds for each of the districts as of July 1, 2017.

District	Major Projects Pending	Debt Owed	Current Reserve Funds
Bakersfield	None	\$900,000; VMBB Bond due 2032	Capital Reserve: \$147,352 Building Fund: \$47,068
Berkshire	None	\$3,038,750; VMBB Bond due 2033	Building Fund: \$327,218
Montgomery	None	\$585,000; VMBB Bond due 2026	Capital Reserve: \$56,604

FY17 Insured Values

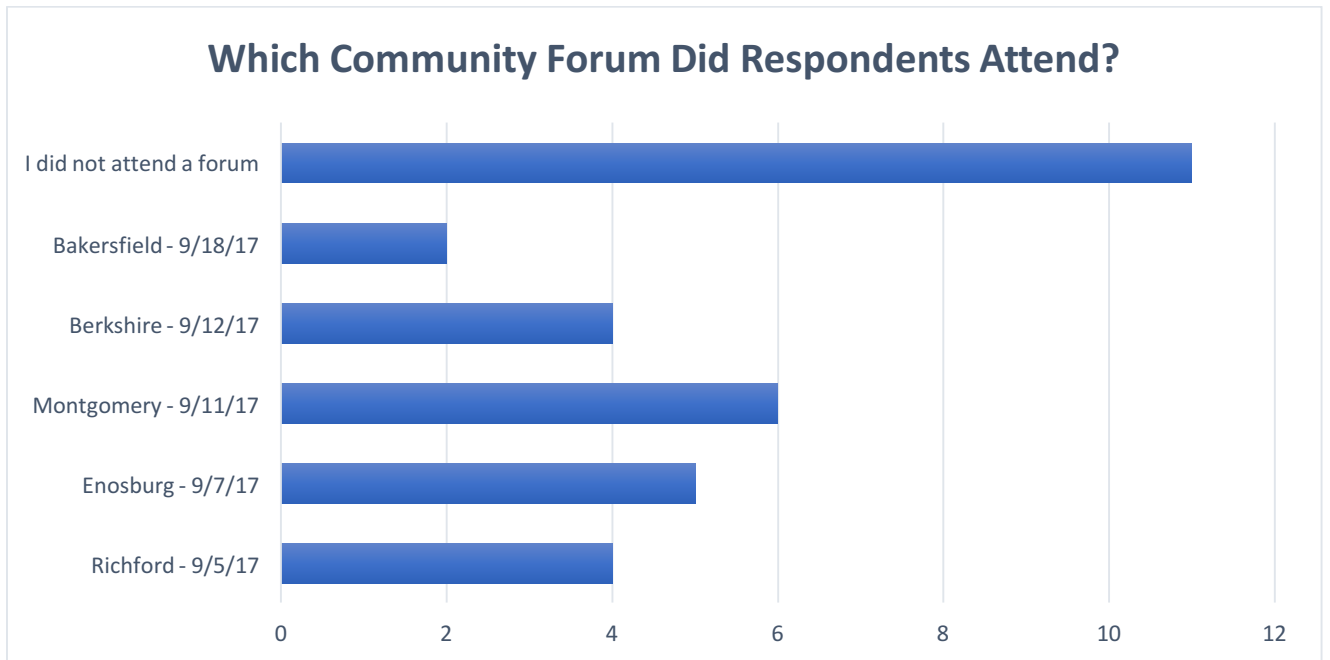
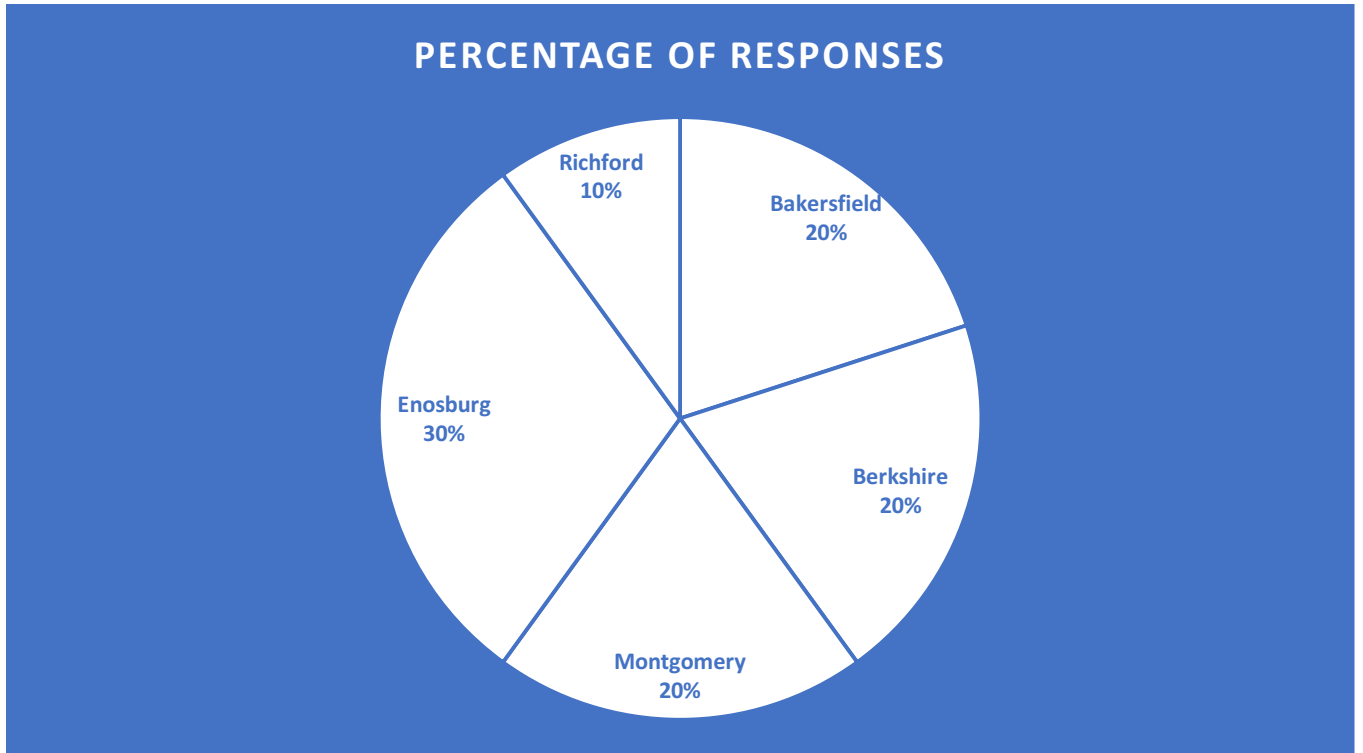
Bakersfield School	\$3,417,500.00
Bakersfield Outbuildings/Land	\$17,000.00
Berkshire Schools	\$3,316,600.00
Berkshire Outbuildings/Land	\$23,000.00
Montgomery Schools	\$2,676,000.00
Montgomery Outbuildings/Land	\$12,000.00

	FY18 Int Pymt	FY18 Prin Pymt	7/1/17 Balance
Bakersfield 2012 Bond	\$28,535	\$56,250	\$900,000
Berkshire 2013 Bond	\$111,560	\$178,750	\$3,038,750
Montgomery 2005 Bond	\$24,424	\$65,000	\$585,000
Total:	\$164,519	\$300,000	\$4,523,750

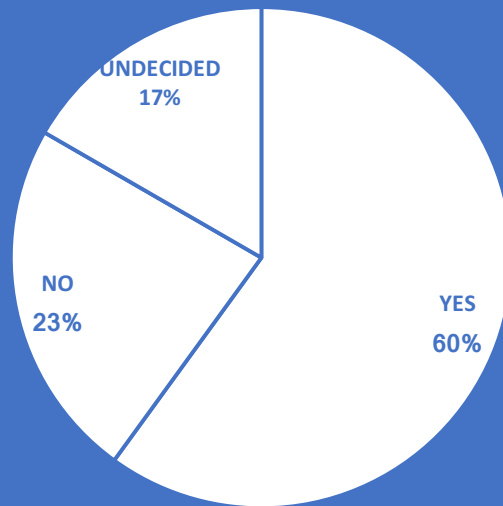
Reserve Funds	As of July 1, 2017
Bakersfield	\$194,420
Berkshire	\$327,217
Montgomery	\$56,604
Total:	\$578,241

Appendix E: Public Forum Summary Data

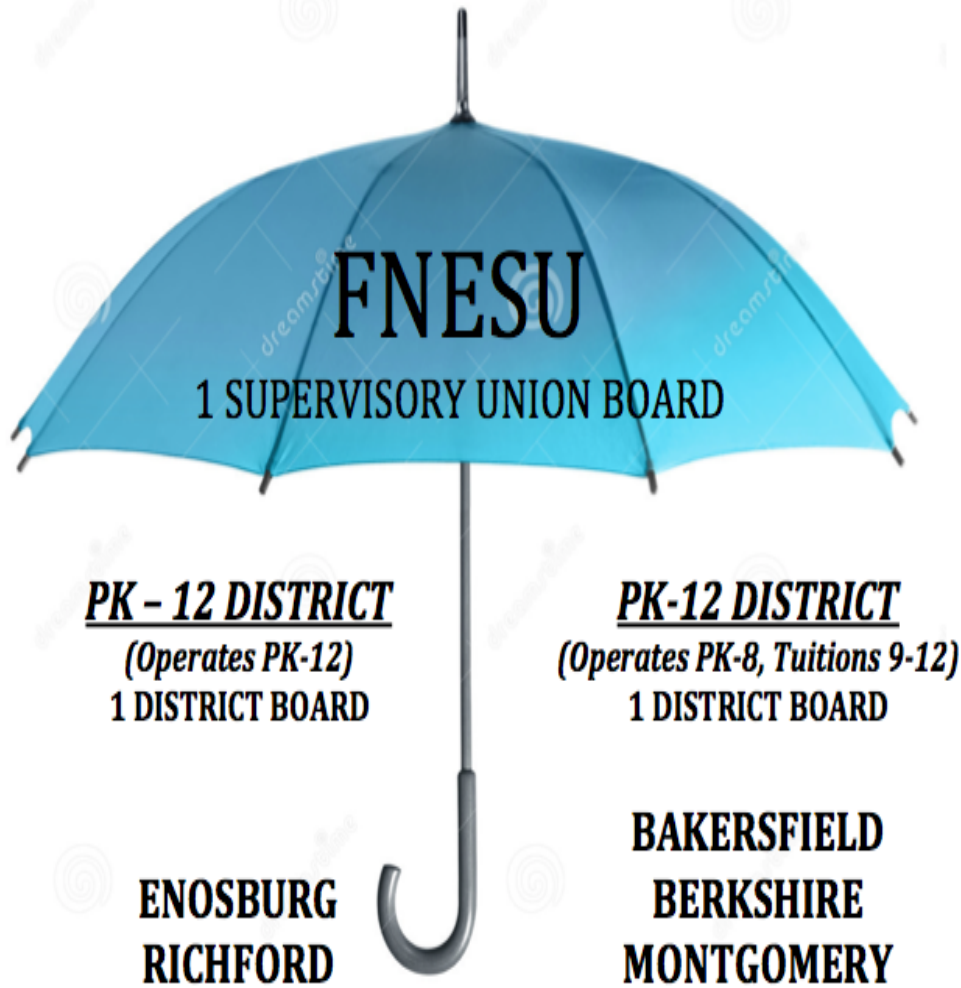
FNESU Community Forum Survey Results



**IF THE VOTE FOR CONSOLIDATION WERE TODAY,
WOULD YOU VOTE IN FAVOR OF THE PROPOSED SIDE-
BY-SIDE MERGER?**



Appendix F: Proposed Governance Chart



Appendix G: Equity in Course Offerings/Instructional Time Data

17/18 Instructional Time – Bakersfield, Berkshire & Montgomery

(R- Reading, W – Writing, Balanced Lit – Combined Reading and Writing)

Kindergarten	Math	Literacy	Science	Social Studies	ART	Music	PE
Bakersfield	60/day	80/day R 60/day W	60/ wk	embedded	60/wk	60/wk	150/wk
Berkshire	90/day	120/day (balanced lit)	60/wk	embedded	40/wk	40/wk	40/wk
Montgomery	85/day	80/day R 27/day W	90/wk	embedded	45/wk	45/wk	90/wk

Grade 1	Math	Literacy	Science	Social Studies	ART	Music	PE
Bakersfield	60/day	80/day R 55/day W	120/wk	embedded	60/wk	60/wk	150/wk
Berkshire	90/day	120/day (balanced lit)	60/wk	embedded	40/wk	40/wk	40/wk
Montgomery	85/day	100/day R, 25/day W	90/wk	embedded	45/wk	45/wk	90/wk

Grade 2	Math	Literacy	Science	Social Studies	ART	Music	PE
Bakersfield	75/day	90/day R 55/day W	120/wk	embedded	60/wk	60/wk	150/wk
Berkshire	90/day	120/day (balanced lit)	60/wk	embedded	40/wk	40/wk	40/wk
Montgomery	90/day	100/day R 30-40/day W	60-90/wk	embedded	45/wk	45/wk	90/wk

Grade 3	Math	Literacy	Science	Social Studies	ART	Music	PE
Bakersfield	105/day	70/day R 50/day W	100/wk	embedded	60/wk	60/wk	150/wk
Berkshire	90/day	120/day (balanced lit)	60/wk	embedded	40/wk	40/wk	40/wk
Montgomery	84/day	92/day R 40/day W	90/wk	embedded	45/wk	45/wk	90/wk

Grade 4	Math	Literacy	Science	Social Studies	ART	Music	PE
Bakersfield	105/day	70/day R 50/day W	100/wk	embedded	60/wk	60/wk	150/wk
Berkshire	90/day	120/day (balanced lit)	60/wk	embedded	40/wk	40/wk	40/wk
Montgomery	102/day	90/day R 20-30/day W	90/wk	embedded	45/wk	45/wk	45/wk

Grade 5	Math	Literacy	Science	Global Citizenship	ART	Music	PE
Bakersfield	60/day	60/day	60/day	60/day	45- 90/wk	60/wk (plus band and chorus)	90 /wk
Berkshire	75/day	150/day (balanced lit)	75/day	embedded	40/wk	40/wk	40/wk
Montgomery	87/day	90/day R 20-25/day W	20/day	embedded	45/wk	45/wk	45/wk

Grade 6	Math	Literacy	Science	Global Citizenship	ART	Music	PE
Bakersfield	60/day	60/day	60/day	60/day	45-90 /wk	60/wk (plus band and chorus)	90/wk
Berkshire	75/day	150/day (balanced lit)	75/day	embedded	40/wk	40/wk	40/wk
Montgomery	85/day	60/day R 20/day W	40/day	60/day	45/wk	45/wk	45/wk

Grade 7	Math	Literacy	Science	Global Citizenship	ART	Music	PE
Bakersfield	60/day	60/day	60/day	60/day	Min of 45 max 90/wk	90/wk band 90 /wk chorus As electives	90/wk
Berkshire	75/day	150/day (balanced lit)	75/every other day	75/every other day	Minimum exposure to art instruction in a year is 3 – quarter long 40 min/wk exploratory courses	Minimum exposure to music instruction in a year is 3 – quarter long 40 min/wk exploratory courses	Minimum exposure to PE instruction in a year is 3 – quarter long 40 min/wk exploratory courses
Montgomery	86/day	46/day R 15/day W	60/day	25/day	45/wk	45/wk	45/wk

Grade 8	Math	Literacy	Science	Global Citizenship	ART	Music	PE
Bakersfield	60/day	60/day	60/day	60/day	Min of 45 max 90/wk	90/wk band 90/wk chorus as electives	90 /wk
Berkshire	75/day	150/day (balanced lit)	75/every other day	75/every other day	Minimum exposure to art instruction in a year is 3 – quarter long 40 min/wk exploratory courses	Minimum exposure to Music instruction in a year is 3 – quarter long 40 min/wk exploratory courses	Minimum exposure to PE instruction in a year is 3 – quarter long 40 min/wk exploratory courses
Montgomery	88/day	46/day R 20/day W	60/day	25/day	45/wk	45/wk	45/wk

Appendix H: Equity in Access to Technology Data

	Bakersfield	Berkshire	Montgomery
Pre-K	Shared Devices	Shared Devices	Shared Devices
K	Shared Devices	Shared Devices	Shared Devices
1	Shared Devices	Shared Devices	Shared Devices
2	1:1 Chromebooks	Shared Devices	Shared Devices
3	1:1 Chromebooks	Shared Devices	1:1 Chromebooks
4	1:1 Chromebooks	Shared Devices	1:1 Chromebooks
5	1:1 Chromebooks	1:1 Chromebooks	1:1 Chromebooks
6	1:1 Chromebooks	1:1 Chromebooks	1:1 Chromebooks
7	1:1 Chromebooks	1:1 Chromebooks	1:1 Chromebooks
8	1:1 Chromebooks	1:1 iPads	1:1 Chromebooks

Appendix I: Equity in Access to Student Support Services

	Literacy Interventionists	Math Interventionists	Literacy Instructional Coach	Math Instructional Coach	Special Educator (K-8)	Home School Coordinator	Percentage of teachers with 5 or fewer years experience
Bakersfield Elementary School	0.5 FTE	0.5 FTE	0.5 FTE	0.5 FTE	1.0 FTE	0	80%
Berkshire Elementary School	1.75 FTE	1.75 FTE	0.5 FTE	0.5 FTE	2.0 FTE	0	38%
Montgomery Elementary School	0.8 FTE	0.4 FTE	0	0	1.2 FTE	0	46%

Appendix J: Board Apportionment

The UUSD will meet the Constitutional Proportionality law by providing each member town with an equal number of seats on the UUSD Board and electing those board members at-large in both communities.

Appendix K: School Choice Options

Describe the grades that are presently served by the Merging Districts and their building configurations (before the proposed merger).

- Elementary students grades PreK-8 in Bakersfield attend Bakersfield Elementary.
- Elementary students grades Prek-8 in Berkshire attend Berkshire Elementary.
- Elementary students grades PreK-8 from Montgomery attend Montgomery Elementary.
- Students in 9-12 in Bakersfield, Berkshire, and Montgomery have high school choice

Describe the grades that will be served by the District after unification and their building configurations.

If the three School Districts approve unification, the UUSD will serve grades Pre- Kindergarten – Grade 8 by providing for students’ education at public schools operated by the UUSD. Grade level configurations by building will be as follows:

- Bakersfield students’ grades PreK-8 attend Bakersfield Elementary School and all Bakersfield students grades 9-12 will have school choice for high school
- Berkshire students’ grades PreK-8 attend Berkshire Elementary School and all Berkshire students grades 9-12 will have school choice for high school
- Montgomery students’ grades PreK-8 attend Montgomery Elementary School and all Montgomery students grades 9-12 will have school choice for high school

Describe any expansion or diminishment of school choice options that will result from the creation of the proposed UUSD.

Elementary/Middle Schools

Approval of the UUSD creates a situation where the UUSD Board may choose to offer school choice to students at the elementary and middle levels. This is currently not possible without tuition payments. For example, the UUSD Board might adopt a policy that allows a student who resides in one town to attend school in a different town if it is closer to home. If parents are responsible for transportation, there is no cost associated with this new benefit.

Elementary/middle school choice would be a great benefit to families who do not own a home and are subject to the fluctuations in the rental markets. Children in these families frequently are forced to change schools partway through the school year because they move a short distance.

High Schools

High school choice will remain the same for students in the forming districts of Bakersfield, Berkshire and Montgomery and students will be able to choose the high school they wish to attend.

Describe any plans, or any discussions that have occurred, regarding designation of one or more public or private schools.

No plans for designation are in place.

FY17 Education Spending Per Pupil

\$5,000 \$10,000 \$15,000 \$20,000

Of the Vermont Districts that operated a school, all FNESU spent less per pupil than the state average.

State Average (\$14,672)

Bakersfield (\$13,728)

Franklin County Average (\$13,140)
Berkshire (\$13,136)

Montgomery (\$11,969)

