

AGENCY OF EDUCATION

Barre, Vermont

TEAM: Governance Team

ITEM: Will the State Board of Education find that the proposed unified union school district formed by all current member districts of the **BARRE SUPERVISORY UNION** ("BSU") 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 BSU Study Committee?

SECRETARY'S RECOMMENDED ACTION:

- 1. That the State Board of Education finds that the proposed formation of a new unified union school district by all member districts of the Barre Supervisory Union, 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 finds that the date identified as the day on which the electorate of the Barre City and Barre Town School Districts will vote whether to approve formation of a new unified union school district, November 6, 2018, is not "in the best interests of the State, the students, and the school districts," including other students and districts in the region.**
- 3. That the State Board of Education requests that the BSU Study Committee consider amending its report pursuant to 16 V.S.A. § 706c(b) to require that the vote be warned to occur on a date prior to October 26, 2018.**
- 4. If the Study Committee amends the report as requested, that the State Board of Education votes to approve the attached report of the BSU Study Committee as amended.**
- 5. That the State Board of Education votes to approve the assignment of the new unified union school district, if approved, to the BSU for the purpose of receiving administrative and other transitional assistance. Assignment would be for the period beginning on the date on which the unified union school district becomes a legal entity pursuant to 16 V.S.A. § 706g and ending on such date, if any, that the State Board declares the new unified union school district to be a supervisory district.**

STATUTORY AUTHORITY: 16 V.S.A. §§ 261 and 706c; Act 46 of 2015, Sec. 7, as amended by Act 49 of 2017

BACKGROUND INFORMATION:

I. General

The BSU consists of two towns organized into three school districts, each governed by its own board. The Barre City and Barre Town School Districts each operate an elementary school serving resident students through grade 8. Both school districts are members of the Spaulding Union High School District, which operates a school offering grades 9-12 and hosts the Central Vermont Career Center.

Agency data reveal that the Fiscal Year 2018 average daily membership (“ADM”) for kindergarten through grade 12 is as follows:

| | |
|--|-------|
| Barre Supervisory Union (K-12): | 2,130 |
| Barre City School District (K-8): | 751 |
| Barre Town School District (K-8): | 713 |
| Spaulding Union High School District (9-12): | 666 |

After passage of Act 46 in 2015, the Barre City and Barre Town School Districts formed a study committee pursuant to 16 V.S.A. § 706 to consider the advisability of creating a unified union school district. The committee met monthly in open session for 16 months, held three public forums, conducted two public surveys, made four public presentations, and engaged in a variety of media outreach activities.¹ The State Board of Education approved the resulting proposal to merge the three districts (“the 2016 Report”) at its October 18, 2016 meeting. On November 8, 2016, the electorate of the Barre City School District approved formation of the proposed unified union school district (2,069 Yes; 694 No). The voters of the Barre Town School District rejected the proposal both at the original November vote (1,611 Yes; 2,108 No) and on reconsideration in January, 2017 (482 Yes; 1,159 No). Because the proposal identified all districts as “necessary,” the districts did not merge into a new unified union school district and the study committee dissolved.

In October and November 2017 respectively, the boards of the Barre Town and Barre City School Districts created a new study committee (“Study Committee”), which met in open session on 12 occasions beginning on February 28, 2018. The Study Committee has engaged in a variety of media outreach activities and has planned additional outreach to occur in September and October.²

The new BSU Study Committee is presenting a proposal to the State Board at the August 15, 2018 meeting. If the State Board and voters approve creation of the proposed unified union school district, then the new district would be eligible for tax rate reductions and other

¹ See Appendix 7 to the October 2016 Final Report, which is itself attached to the August 2018 Final Report as Appendix 7.

² See Appendix 6 to the August 2018 Final Report.

transitional assistance available under the “Conventional” merger program established in Act 46, Sec. 7.

II. “The Barre Unified Union School District”

The BSU Study Committee recommends creation of a unified union school district (“New Unified District”).

It proposes that the New Unified District would be its own supervisory district pursuant to 16 V.S.A. § 261(c) and Act 46, Sec. 7.

The Study Committee identifies all three BSU districts as “necessary” to the proposal pursuant to 16 V.S.A. § 706b(b)(1). It does not identify any district as “advisable” to the proposal pursuant to 16 V.S.A. § 706b(b)(2).

The Study Committee proposes that, if approved by the State Board, the voters of both of the two town elementary districts will vote on November 6, 2018 whether to approve creation of the New Unified District.

The New Unified District, which would be known as the Barre Unified Union School District, would merge all three school districts into a single district responsible for operating schools for prekindergarten through grade 12. Creation of the New Unified District would replace three governing bodies with one unified board, and would replace a fourth governing body (the supervisory union board) if the State Board grants the Study Committee’s request to designate the New Unified District as its own supervisory district.

The New Unified District would be governed by a nine member school board. Eight board members would be nominated by and from among the electorate of the individual towns, with the number to be nominated by a single town being closely proportional to the fraction the town population bears to the total population of the New Unified District (initially four from Barre City and four from Barre Town). Election of these eight board members would be by the electorate of the town to which the board seat was apportioned. The ninth member would fill a fully at-large seat on the board.

Students in elementary and middle school would continue to attend the school located in the town/city in which they reside. The unified board would adopt a policy on intra-district choice by which it would determine whether to grant a parental request for a student to attend the school located in the other town/city.

A currently operating elementary/middle school building could be closed only if approved by a majority of the electorate of the New Unified District. Similarly, the unified board could not reconfigure grades in a way that create one elementary school building and one middle school building without approval of New Unified District’s electorate.

If a school building were closed and would no longer be used for public education purposes, then the town in which the 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 by the town for fewer than five years.

The proposed articles require the unified board to “ensure ongoing opportunities for local input on policy, budget development, and other topics relevant to the operation of the schools.” The articles also require the unified board to establish school-based councils or other structures “to support and encourage public participation” in the New Unified District.

The merger vote and election of initial board members will take place by Australian ballot, as required by statute. All later votes on the budget, board membership, and other public questions would be by Australian ballot and the votes would be counted separately in each town before determining the combined result.

If approved by the State Board and the voters of the districts, the New Unified District would be fully operational on July 1, 2019 and would be eligible for tax rate reductions and other transitional assistance under Act 46, Sec. 7, as amended.

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 BSU Study Committee’s proposal is “in the best interests of the State, the students, and the school districts” pursuant to 16 V.S.A. § 706c.

The 2016 Report examined the community’s educational vision, the potential for maximizing efficiencies, the projected financial consequences of unification, and transition planning. It included tables and charts that, among other things, compared proficiency on the Smarter Balanced Assessments when disaggregated to reflect students who live in poverty. The 2016 Report also addressed concerns raised by the community and explained the reasons that the proposal did not include districts outside the supervisory union.

The current BSU Study Committee reviewed updated school data and discussed the October 2016 report, concluding:

While [the “Educational Vision for Unification” and “Maximizing Efficiencies”] were discussed extensively as part of the Committee’s review of the original Final Report and the extended discussion regarding the pros and cons of merger, the Committee did not reach any conclusions that would require revision of these sections in the original Final Report[, which it included as Appendix 7 to August 2018 Final Report].

As a result, the discussions of the current proposal below, regarding educational and fiscal implications, are based in part on the October 2016 Final Report.

EDUCATION IMPLICATIONS: When developing the proposal’s education vision for unification, the October 2016 Final Report concluded that “it is not enough to simply point out the potential opportunities that might attend a unification of existing education governance structures, but [it was necessary] to provide voters with concrete examples of

how a unified district might in fact operate, and the opportunity to evaluate specific initiatives” Although the districts have taken a number of steps in recent years to coordinate and deliver more equitable instruction to students throughout the supervisory union, the 2016 Report identified a range of potential educational benefits of merger, including:

1. Increased sharing of educational resources among buildings (*e.g.*, piano keyboards; Naviance career readiness training; and microscopes).
2. Improved communication within and between departments and grade levels (noting the historic lack of alignment of world languages across buildings).
3. The elimination of bureaucratic redundancies and centralization of supports so that administrators are able to focus on their roles as educational leaders.
4. The creation of a unified program of educator recruitment, induction, and mentoring, including paraprofessionals and substitutes.

FISCAL IMPLICATIONS: The BSU already has centralized services and operations for many functions. Nevertheless, the BSU Study Committee was able to project “operational savings due to unification of \$200,000 in the first year of operation and subsequent years” when modelling future trend financial lines as a unified district versus the current multi-district structure. Potential annual cost reductions would occur in connection with auditing, board salaries, stenographic services, legal services, supplies, dues, and other areas. In addition, the October 2016 Final Report anticipated additional potential cost reductions resulting from the formation of a unified union through, for example, the negotiation of common vendor contracts for food services and copiers, the coordination of staffing assignments to address changing needs, and increased efficiency in state and federal data collection and reporting. *See also* Act 46, as amended, for cost implications to the State.

DATE FOR VOTE OF THE ELECTORATE:

The BSU districts complied with the requirements of Act 46, Sec. 9 by submitting a letter in December, 2017 identifying the districts’ intention to explore unification pursuant to Act 46, Sec. 7.³ Although the December letter did not identify specific dates, the letter indicated the districts’ intent to present a new proposal and articles to the State Board “in August, 2018 or earlier” and to the voters “by September, 2018 or earlier.” The BSU districts declined to schedule a “conversation” with the Secretary under Act 46, Sec. 10.

The Secretary’s proposed statewide plan issued on June 1, 2018 stated in part:

The timing of the currently-available voluntary merger options complicates the ability of the Secretary to issue the proposed plan by June 1, 2018 and – more significantly – the State Board to issue its final statewide plan by November 30, 2018. Nevertheless, the Legislature clearly contemplated that districts would

³ A new unified union school district that meets the criteria outlined in Act 46, Sec. 7 is eligible for tax rate reductions and other transitional assistance under that section, as amended. These are the so-called “Phase 3” voluntary mergers.

continue to have the opportunity to pursue governance consolidation during the period in which the statewide plan is being developed (*e.g.*, the Legislature enacted both the Sec. 7 merger possibilities and the Sec. 10 statewide plan deadline in the same piece of legislation), and that new unified union school districts created during this period would be eligible for tax rate reductions and other transitional assistance if they met certain criteria.

The fact that both communities voted to establish a new § 706 Study Committee represents a genuine effort toward reaching a compromise and there appears to be a strong possibility that the districts will unify.

The Secretary's ability to comment is limited because it is impossible to predict whether the study committee will develop a final [merger] proposal [i.e., the one now before the State Board] and, if so, whether the voters of both "necessary" districts will approve unification. By the time the State Board is required to issue its final statewide plan, the Board will have the information it needs to make its decisions.

Accordingly, in light of this development and out of respect for the Legislature's decision to provide the districts with this opportunity to merge voluntarily and obtain tax rate reductions, the Secretary makes no recommendation regarding the governance structure of the Barre City, Barre Town, and Spaulding Union Districts at this time so that the Agency does not insert itself into community discussions and potential votes of the electorate. The Secretary anticipates that the State Board will review and may potentially address the governance structure of these districts in its final statewide plan.

The proposed articles of agreement before the State Board identify November 6, 2018 as the date on which electorate will vote whether to accept the new unification proposal.

Act 46 required the Secretary to review the governance structures of school districts "as they will exist, or are anticipated to exist, on July 1, 2019" and propose a plan to the State Board on or before June 1, 2018. Act 46 then requires the State Board to review and analyze the Secretary's proposal and, on or before November 30, 2018, to issue its own final statewide plan merging districts with identical operating/tuitioning structures where necessary to create "sustainable governance structures designed to meet the goals" of Act 46.⁴

A vote of the Barre City and Barre Town electorates on November 6 would be subject to the 30-day reconsideration period, during which time the voters in either Barre City or Barre Town could file a petition for a reconsideration. As a result, even if no reconsideration petition were filed, December 7 is the earliest date on which the November 6 vote would be final.

If the voters in either Barre City or Barre Town did not approve the merger proposal on November 6, then it would be reasonable for the State Board to "anticipate" that the districts would not be merged into a "preferred structure" by July 1, 2019 and therefore should be considered under the Statewide Plan. However, even if the State Board waited until November

⁴ Act 46, Secs. 10(a) and (b).

30 to issue its final plan, the Barre merger vote still would be in the midst of the 30-day period during which the voters could file a petition for reconsideration. The voters could, theoretically, approve merger on reconsideration, and by doing so enable the New Unified District to receive tax rate reductions and other transitional assistance that it would not receive if the State Board required the merger.

Conversely, if the voters in both Barre City and Barre Town approved the merger proposal on November 6, then it would be reasonable for the State Board to “anticipate” that both towns would be in a preferred structure on July 1, 2019, and that the State Board had no authority to include the districts in its statewide plan. A petition for reconsideration filed after November 30, however, could theoretically result in disapproval of the merger long after the State Board’s authority to require creation of a unified Barre district expired.

Eligibility for tax rate reductions and other transitional assistance under Act 46, Sec. 7 does not include a deadline by which the vote of the electorate must occur, and the State Board recently approved a November 6 voting date for the Orleans Central SU districts’ merger proposal.

The level of uncertainty caused by a November 6 voting date is more significant in the Barre City-Barre Town situation than in Orleans Central for at least two reasons.

The Legislature determined that the governance structure that was most likely to meet and exceed the Act 46 educational and fiscal goals in a sustainable manner is a “preferred structure,” a unified union school district that is large enough to serve as its own single-district supervisory union (*i.e.*, a supervisory district). Given the “un-like” operating and tuitioning structures of the districts in the Orleans Central SU, the State Board does not have the authority to require the districts to create a “preferred structure.”⁵ In contrast, the State Board has the authority under Act 46 to require the three districts in the Barre SU to form a “preferred structure” if the Board determines that unification is necessary in order to create a sustainable structure capable of meeting the Act 46 goals. Both the State Board’s obligation to require district governance mergers and the Board’s authority to do so expire at the end of the day on November 30. A November 6 vote of the electorate essentially nullifies the State Board’s one-time ability to create a preferred structure if it determines such a structure is necessary in the Barre region, which cannot have been the intent of the Legislature.

Furthermore, in contrast to the Orleans Central SU districts, the Barre SU districts are in a region that has many other districts with “like” operating structures. When making decisions regarding these other districts, it will be important for the State Board to know whether the Barre City, Barre Town, and Spaulding Union School Districts are subject to the final statewide plan so that it can consider a full range of possible options.

Therefore, the Secretary recommends that the State Board asks the BSU Study Committee to consider amending its report pursuant to 16 V.S.A. § 706c(b) to require that the vote be warned to occur on a date prior to October 26, 2018.

⁵ If the Orleans Central SU districts do not approve merger, then the State Board could – at most – require six of the SU’s seven elementary school districts to form a union elementary school district.

CREATION OF A SUPERVISORY DISTRICT:

The August 2018 Final Report requests the State Board to designate the New Unified District, if created, to be its own supervisory district pursuant to 16 V.S.A. § 261(c). This is, as discussed above, the legislatively-identified “preferred structure” for school governance.

Nevertheless, there are many possibilities in the Central Vermont region for the State Board to consider in its final statewide plan, both as to school district governance and supervisory union boundaries. The State Board may want to decline the BSU Study Committee’s request for designation as a supervisory district at this time so that the Board does not preclude its options under the final statewide plan. The State Board could address the question either as part of its statewide plan or separately, upon the later request of the New Unified District pursuant to 16 V.S.A. § 261(c).

It is important to note that the New Unified District would not be disadvantaged by a delay in the decision, even if that decision requires it to be a member of a multi-district supervisory union. Pursuant to Act 46, Sec. 7, a newly-created unified union school district must be a supervisory district to qualify for tax rate reductions and other transitional assistance. Act 49 of 2017 clarified this requirement in Sec. 19⁶, however, stating that a unified district that is large enough to be its own supervisory district remains eligible under Sec. 7 even if the State Board requires it to be a member district within a larger supervisory union.

Therefore, the Secretary suggests that the State Board decline the current request to designate the New Unified District, if created, to be its own supervisory district and revisit the issue either in its final statewide plan at a subsequent date.

CONCLUSIONS and RECOMMENDATIONS:

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.

If the Study Committee amends the voting date in the August 2018 Final Report as suggested above, then the Secretary recommends that the State Board of Education votes to approve the attached report of the BSU Study Committee as amended and that the Board.

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

⁶ Sec. 19. QUALIFICATION FOR INCENTIVES; ASSIGNMENT TO A SUPERVISORY UNION BY THE STATE BOARD

Notwithstanding any requirement under 2015 Acts and Resolves No. 46, Secs. 6 and 7 that the newly formed school district be its own supervisory district, the newly formed school district shall qualify for the incentives under those sections even if it is assigned to a supervisory union by the State Board of Education and that assignment by the State Board is not made at the request of the school district.

BARRE UNIFIED SCHOOL DISTRICT ACT 46 STUDY COMMITTEE – FINAL REPORT AUGUST 6, 2018

Barre Supervisory Union

120 Ayers Street
Barre Vt, 05641



BCEMS



BTMES

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BSU ACT 46 STUDY COMMITTEE MEMBERS

Co- Chairs

Gina Akley – Barre Town Community Representative

Tyler Smith – Barre City Board Member

Members

Marcia Biondolillo – Barre Town Community Representative

Jeff Blow – Barre Town Community Representative

Giuliano Cecchinelli – Barre City Board Member

Paul Cook – Barre City Community Representative

Sarah Costa – Barre City Community Representative

Michael Deering – Barre City Board Member

J Guy Isabelle – Barre Town, SHS Board Member

Rebecca Kerin-Hutchins – Barre Town Board Member

Michaela Martin – Barre Town Community Representative

Ed Rousse – Barre City, SHS Board Member

Jessica Vest – Barre City Community Representative

Kim Whitcomb – Barre Town Community Representative

Administrative Support

John Pandolfo – Superintendent of Schools

EXECUTIVE SUMMARY

Introduction:

Currently the needs and interests of Barre students are served by four distinct governance bodies: 2 local elementary school boards, representing the communities of Barre City and Barre Town; one high school union board overseeing the operation of Spaulding Union High School and the Central Vermont Career Center; and one board overseeing the affairs of the entire Barre Supervisory Union.

Act 46 is a far reaching piece of legislation designed to encourage school districts to explore the potential benefits of unifying their existing governance structures into a single school board responsible for serving every student in the current supervisory union. It is a bill whose central goal is improving the educational quality of those schools at an affordable and sustainable cost that taxpayers will value.

From 2015 – 2016, a 706b Merger Study committee comprised of members from both Barre Town and Barre City worked with a consultant from the Act 46 Project to develop a merger plan and draft proposed Articles of Agreement to govern the new district. The Final Report of this committee was released on October 6, 2016, and the merger was put to a vote in both communities in November 2016. While the community of Barre City voted to move forward with the merger, the community of Barre Town voted the proposal down. A request for a revote, which took place in January 2017, resulted in the same outcome. In the Fall of 2017, the Barre Town and Barre City School Boards voted to form a new 706b Merger Study Committee to reassess the advisability of merging the Barre districts voluntarily and draft a new version of the Articles of Agreement which would govern the district.

The new Study Committee met twice a month from March 2018 – August 2018 in open session. Due to its understanding that the State Board of Education must by law release its final plan by November 30, 2018, the Committee simultaneously addressed the question of whether or not a new vote was advisable and made revisions to the original Articles of Agreement that might alleviate some voter concerns regarding operation of the new district.

The Committee has attempted to maintain a transparent record of its work through the ongoing posting to the S.U.'s website of its meeting schedule, minutes, video recordings, working documents, and draft findings. The Committee has also included time for public comment in each meeting agenda to elicit public input on the progress of committee work and to help clarify the Committee's understanding of public sentiment regarding a district merger.

During its deliberations concerning any potential plan to unify Barre's current Supervisory Union structure into a single unified district governed by a single school board, the Committee revisited the central overriding question that guided the first study committee, namely:

How would unification benefit our children? Specifically, how would a new, unified district governance structure provide better, more equitable instructional opportunities and better support students to achieve or exceed the State's Educational Quality Standards at a cost that parents, voters, and taxpayers value?

The Committee also addressed the questions of whether or not voters in both communities would accept the decision to move forward with a third vote, and if it was possible to draft a version of the Articles of Agreement that would be agreeable enough to result in a different outcome. It was agreed by the Committee that these questions were more relevant to a decision about whether or not to move forward, and as such the Committee devoted a substantial amount of time to exploration in these areas.

Summary Committee Findings/Recommendations:

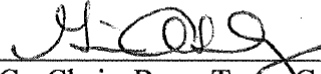
The Committee has reviewed all of the materials in the original Final Report, with the SU providing updated financial projections, student performance data, and information regarding estimated gains from operational efficiencies resulting from the merger. The Committee has revised the Articles of Agreement presented in the original Final Report to address community concerns around loss of local control, schools merging or closing, and redistricting. Upon completing a final draft of the revised Articles of Agreement, the Committee voted 5-3, with 4 members absent and the co-chairs abstaining, to bring a voluntary merger to a public vote prior to the November 30, 2018 deadline.

The Committee has also reviewed the benefits of a merger as presented in the original Final Report. While most members of the Committee agree that a district merger will result in cost savings and increased efficiencies in operations and educational delivery, there is not unanimous consensus that it will positively impact the overall quality of education. However, based on the Secretary of Education's Draft Statewide Plan, released on June 1, 2018, and the criteria for maintaining an approved alternative structure under Act 46, the majority of Committee members believe that the Barre districts will be merged by the State if they choose not to do so voluntarily. The Committee has identified the following benefits of a voluntary merger:

- 1) The merged district will be able to operate under the Articles of Agreement drafted by the Study Committee rather than under the standard Articles of Agreement provided by the State. The Committee's Articles protect the interests of both communities requiring a public vote to approve school mergers and/or closures, any proposed redistricting, and changes to the Board structure.
- 2) If formed voluntarily, the Barre Unified Union School District will not be required to include schools from outside of the communities in the merged district.

The original final report addressed the challenge of creating a unified sense of community identity and culture within the new Barre Unified Union School District. The Committee did not specifically address this challenge as parts of its discussions around the merger, but it clearly remains an important consideration as the communities move forward with the new district. The Committee acknowledged that community outreach and education would be a critical component of a successful merger vote and has started to discuss the most effective methods of reaching out to community members prior to the next vote.

Signatures of Members of the BSU Act 46 Study Committee



Gina Akley – Co-Chair, Barre Town Community Representative



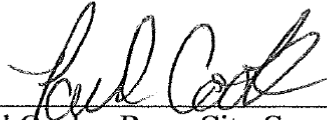
Marcia Biondolillo – Barre Town Community Representative



Jeff Blow – Barre Town Community Representative



Giuliano Cecchinelli – Barre City Board Member



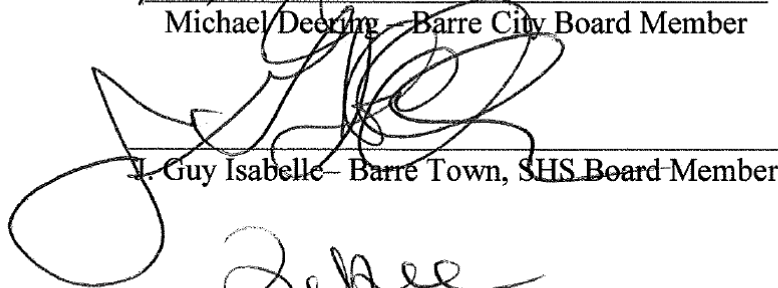
Paul Cook – Barre City Community Representative



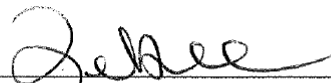
Sarah Costa – Barre City Community Representative



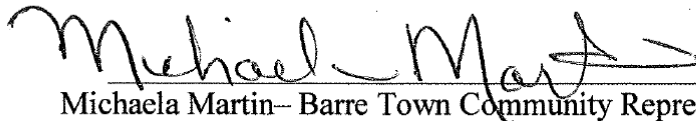
Michael Deering – Barre City Board Member



J. Guy Isabelle – Barre Town, SHS Board Member




Rebecca Kerin-Hutchins – Barre Town Board Member



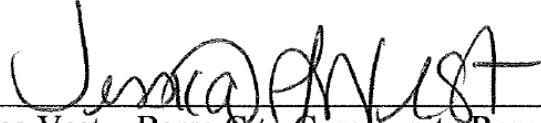
Michaela Martin – Barre Town Community Representative



Ed Rousse – Barre City, SHS Board Member



Tyler Smith – Co-Chair, Barre City Board Member



Jessica Vest – Barre City Community Representative



Kim Whitcomb – Barre Town Community Representative

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

August 3, 2018

John Pandolfo, Superintendent of Schools
Barre Supervisory Union
120 Ayers St
Barre, VT 05641

Re: Proposed New Unified Union School District Board Membership

Dear John:

I am writing to confirm that the proposal set forth by the School Districts of Barre City, Barre Town and Spaulding Union High School pertaining to board membership of the proposed Barre Unified Union School District using a combination of a Proportional-By-Town and At-Large 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 official 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.

Article 8 of the Articles of Agreement proposes a nine-member board, with eight seats determined by proportional representation and one seat determined by at-large representation. For the eight seats determined by proportional representation, initial Board membership is four members each from Barre City and Barre Town. With a population for the proposed Barre Unified Union School District of 16,382 residents, Barre City has 53% of the population and board representation equal to 50% with four of eight proportional seats. Barre Town has 47% of the population and board representation equals 50% of the eight proportional seats. The apportionment plans set forth in Article 8 results in a maximum deviation of three percent. This falls well within the parameters of a minor deviation. The Articles of Agreement further ensures compliance by tying future composition and recalculation to the Federal Census on decennial basis.

Nominations for these eight seats will occur pursuant to 16 V.S.A. § 706e(b) (submission of a

statement of nomination signed by at least 30 voters or one percent (1%) of the legal voters of Barre City (for four seats) or Barre Town (for four seats), whichever is less and accepted by the nominee). The vote on candidates shall occur consistent with 16 V.S.A. §706e(b) (vote on candidates will be by town of residence).

For the ninth seat, the At-Large seat, the qualified voters of the union-wide electorate will vote on the nominations for this single seat and the individual elected will represent the entire electorate, not just the town of residence. This model has been upheld as being consistent with the Equal Protection Clause as long as this member is a representative 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).

For this seat, nominations will occur pursuant to 16 V.S.A. § 706e(c) (submission of a statement of nomination signed by at least 60 voters or one percent (1%) of the legal voters of the proposed unified union school district, 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 model for this seat is 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 at least four members from each community. This requirement is thus satisfied. Further, the statute requires that the board have no more than 18 members. With the proposed nine-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).

Sincerely,

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



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A Unified Vision for Delivering a Quality Education to all Barre Children
Final Report
Barre City and Barre Town Act 46 706b Study Committee

Introduction:

Act 46 is a far reaching piece of legislation designed to encourage school districts to explore the potential benefits of unifying their existing governance structures into a single school board responsible for serving every student in the Barre City and Barre Town communities. It is a bill whose central goal is improving the educational quality of those schools at an affordable and sustainable cost that taxpayers will value.

From 2015 – 2016, a 706b Merger Study committee comprised of members from both Barre Town and Barre City worked with a consultant from the Act 46 Project to develop a merger plan and draft proposed Articles of Agreement to govern the new district. The Final Report of this committee was released on October 6, 2016, and the merger was put to a vote in both communities in November 2016. While the community of Barre City voted to move forward with the merger, the community of Barre Town voted the proposal down. A request for a revote, which took place in January 2017, resulted in the same outcome. In the Fall of 2017, the Barre Town and Barre City School Boards voted to form a new 706b Merger Study Committee to reassess the advisability of merging the Barre districts voluntarily and draft a new version of the Articles of Agreement which would govern the district.

The new Study Committee met twice a month from March 2018 – August 2018 in open session. Due to its understanding that the State Board of Education must by law release its final plan by November 30, 2018, the Committee simultaneously addressed the question of whether or not a new vote was advisable and made revisions to the original Articles of Agreement that might alleviate some voter concerns regarding operation of the new district.

The Committee has attempted to maintain a transparent record of its work through the ongoing posting to the S.U.'s website of its meeting schedule, minutes, video recordings, working documents, and draft findings. The Committee has also included time for public comment in each meeting agenda to elicit public input on the progress of committee work and to help clarify the Committee's understanding of public sentiment regarding a district merger.

The Committee reviewed the five key goals at the heart of the Act 46 law as part of its discussion around whether or not a merger would benefit the communities and students. While it was the opinion of some on the Committee (and some members of the public) that our schools are already meeting all of the 5 goals under the current structure, the majority of committee members believed that the goals would be better achieved with a district merger.

5 Key Goals of Act 46

- *To provide substantive equity in the quality and variety of educational opportunities statewide.*
- *To lead students to achieve or exceed the State's Educational Quality Standards.*
- *To maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with the goal of increasing the district-level ratio of students to full-time equivalent staff*

- *To promote transparency and accountability.*
- *To achieve these goals at a cost that parents, voters, and taxpayers value.*

During its deliberations concerning any potential plan to unify Barre’s current Supervisory Union structure into a single unified district governed by a single school board, the Committee revisited the central overriding question that guided the first study committee, namely:

How would unification benefit our children? Specifically, how would a new, unified district governance structure provide better, more equitable instructional opportunities and better support students to achieve or exceed the State’s Educational Quality Standards at a cost that parents, voters, and taxpayers value?

The Committee also addressed the questions of whether or not voters in both communities would accept the decision to move forward with a third vote, and if it was possible to draft a version of the Articles of Agreement that would be agreeable enough to result in a different outcome. It was agreed by the Committee that these questions were more relevant to a decision about whether or not to move forward, and as such the Committee devoted a substantial amount of time to exploration in these areas.

For the first several meetings, the Study Committee reviewed and discussed:

- Pros & cons of a merger
- The criteria for Alternative Structures under Act 46
- Current performance to the 5 Key Goals of Act 46
- Current financial and enrollment data (updated from the last Final Report)
- Financial & tax implications of a merger (updated from the last Final Report)
- The Districts’ Real Property – Assets and Liabilities (updated from the last Final Report)
- Potential operational efficiencies
- Impact on staffing flexibility and job security
- The logistics and cost of a new public vote

The Committee also invited board chairs from the new Paine Mountain School District and Harwood Union Unified School District to come and discuss their experience with the transition and operations under their new districts.

In addition, the Committee reviewed the original Final Report as it represents a body of work undertaken over a lengthy period of time and supported by consulting resources that are no longer available. That Final Report was organized into the following sections:

- A. Educational Vision for Unification**
- B. Maximizing Efficiencies**
- C. Financial/Tax Rate Projections**
- D. Transition Plan**
- E. Articles of Agreement**

As a general rule, the Committee accepted the exploratory information presented in the original Final Report as still true and relevant. While much of the information from the original report was naturally

addressed as part of the Committee’s discussions, the Committee did not formally undertake additional information gathering or reevaluation of the following sections:

- A. Educational Vision for Unification
- B. Maximizing Efficiencies

While these areas were discussed extensively as part of the Committee’s review of the original Final Report and the extended discussion regarding the pros and cons of a merger, the Committee did not reach any conclusions that would require revision of these sections of the original Final Report. The Committee determined that the portion of the Final Report of most interest and concern to voters was the Articles of Agreement which outline the establishment and governance requirements of the new district. As such, this Final Report refers to the original Final Report, dated October 6, 2016, and included as **Appendix 7 (pages 37 – 111 of this report)**, for comprehensive information regarding the **Educational Vision for Unification** and **Maximizing Efficiencies** resulting from the proposed merger.

This Final Report includes updated information regarding **Financial/Tax Rate Projections, Transition Plan, and Articles of Agreement**, which are detailed in the following pages.

Final Note: Neighboring Districts:

During the course of the Barre Supervisory Union's first 706b study, undertaken in 2015-2016, the Committee did not have discussions with any neighboring districts. The new Study Committee also declined to engage in formal discussions with neighboring districts, even in light of the information presented in the Vermont Secretary of Education's Draft Statewide Plan, released on June 1, 2018. The reasons for this include:

1. The Barre Supervisory Union is already the largest PreK-12 educational system in central Vermont and as a single district would meet the requirements of a preferred structure under Act 46.
2. The long history between Barre City and Barre Town as educational partners including the formation of the Spaulding Union High School District in 1987 to share the governance of Spaulding Union High School and the Central Vermont Career Center, as well as the formation of the Barre Supervisory Union in 1994 to unify, at a supervisory union level, the governance of the school systems in Barre Town and Barre City.
3. The fact that both communities are already a part of a single supervisory union with no additional districts.
4. The fact that most of the supervisory union's closest neighbors have already merged or have presented a Section 9 Proposal to the Agency of Education and State Board of Education.
 - a. Twinfield is the one neighboring school still looking for a district to join. The committee did hear from the Twinfield Board Chair that they would be amenable to being either merged with the Barre districts or included as a separate district under the Barre SU. Both sides agreed that it was too late in the game for Twinfield to be included as part of Barre's proposal for a voluntary merger.

Given the geographic realities and the current merger status of the neighboring districts, the Committee concluded that there were no potential additional partners available with whom to engage in a dialogue concerning a potential merger. The committee also acknowledged that the state could not move another district into a voluntarily merged Barre district, but that the state could move another district into a newly formed supervisory union containing a voluntarily merged Barre district.

FINANCIAL/TAX RATE PROJECTIONS

Model Projections:

The financial model utilized in this study is designed to predict trend lines in future homestead tax rates through FY25 for the communities of Barre City and Barre Town under two distinct scenarios: (1) as a merged district; or (2) remaining as three separate districts and a supervisory union (the existing governance structures). The model projects:

- I. The trend lines in Educational Spending and Local Tax rates for a merged district beginning in FY20 (Merged Scenario), and
- II. The trend lines in Educational Spending and Local Tax rates for these same districts should they remain as they are (No Change Scenario), and,
- III. The differences in tax rates between a Merged Scenario and a No Change Scenario by computing and comparing the total increases/decreases in tax liabilities through FY25.

Notes:

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

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

The model shows the projected trend lines in homestead tax rates, before they are adjusted by the Common Level of Appraisal (CLA) in each community, and after they are adjusted for Common Level of Appraisal (CLA) in each community holding the CLA constant at the current value.

The tax rate you see on your individual tax statement is the homestead tax rate after it is adjusted by each town's common level of appraisal.

Assumptions:

- A. The model assumes that the new unified district would come into existence in FY20.
- B. The Model uses existing financial data from FY18 and FY19 from each individual district involved in this study for determining the baseline for educational spending, equalized pupils, equalized spending per equalized pupil, etc. for the new merged district.
- C. It considers the previous six-year average for determining the change rates for education spending, equalized pupils, and Grand Lists though individual districts can adjust these rates at their own discretion should they believe past trends to be an inaccurate predictor of future trends.
- D. The model builds in the tax incentives associated with a Phase III merger over the first four years of the new district's existence. It also takes into account the 5% rate limit on increases or decreases on the homestead property tax rate during that same time frame.

- E. The merged model leaves in place the hold-harmless provision on equalized pupil calculations (e.g. equalized pupil counts do not drop more than 3.5% per year) for every eligible district in the new merged district as well as the continuation of small schools grants to eligible districts.
- F. For the No Change Scenario, hold-harmless and small school grants are adjusted in accordance with the terms of Act 46. (Hold-Harmless FY21 and Small Schools Grants FY20).
- G. The model’s default setting projects the taxes on a **\$150,000 house**. That setting can be changed to project the potential tax impact on properties assessed at different values.
- H. The projected results in the current model assume operational savings due to unification of \$200,000 in the first year of operation and subsequent years. In addition, the education spending rate used in the model for the new district is 2% versus the aggregate growth in educational spending of 2.9%. Finally, the model takes into account the tax incentives over the next four years (8, 6, 4, and 2 cents off the homestead tax rate) built into the law.

Rates of Change:

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

- a) Educational Spending for each town and for the new district as a whole.
- b) Equalized Pupils for each town and for the new district as a whole.
- c) Educational Grand List for each town.

To determine a **starting place** for assessing projected rates of change in Educational Spending and Equalized Pupils, this model uses the previous six-year average change rate in Educational Spending and Equalized Pupil Counts based on the specific data from FY13 and FY19.

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

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

The rates of change applied to this first run of the model were determined as follows:

| Change Rates For Model: | Education Spending Increase | Equalized Pupil Increase | Grand List Increase |
|---|-----------------------------|--------------------------|---------------------|
| Barre City | 3.25% | 0.46% | 0.32% |
| Barre Town | 2.74% | -0.14% | 0.82% |
| Spaulding | 1.25% | | |
| Unified Union District | 2.00% | aggregate | aggregate |
| ACTUALS | | | |
| 2019 | | | |
| | Ed Spend | Eq. Pup. | Ed Spend/Eq. Pup |
| Barre City | \$11,427,173 | 884.55 | \$12,919 |
| Barre Town | \$9,979,543 | 792.60 | \$12,591 |
| Spaulding | \$10,545,225 | 781.66 | \$13,491 |
| Total Education Spending | \$31,951,941 | 2,459 | \$12,994 |
| | | | |
| 2012 | | | |
| | Ed Spend | Eq. Pup | Ed Spend/Eq. Pup |
| Barre City | \$9,431,566 | 860.58 | \$10,960 |
| Barre Town | \$8,483,135 | 799.49 | \$10,611 |
| Spaulding | \$9,787,791 | 845.23 | \$11,580 |
| Total Education Spending | \$27,702,492 | 2,505 | \$11,058 |
| | | | |
| % INCREASES/DECREASES (5 Year Average) | | | |
| | Ed. Spend | Eq. Pup | Ed Spend/Eq. Pup |
| Barre City | 3.25% | 0.46% | 2.78% |
| Barre Town | 2.74% | -0.14% | 2.89% |
| Spaulding | 1.25% | -1.29% | 2.58% |
| TOTAL | 2.90% | -0.37% | 2.73% |

Results:

Equalized Tax Rates – FY-25

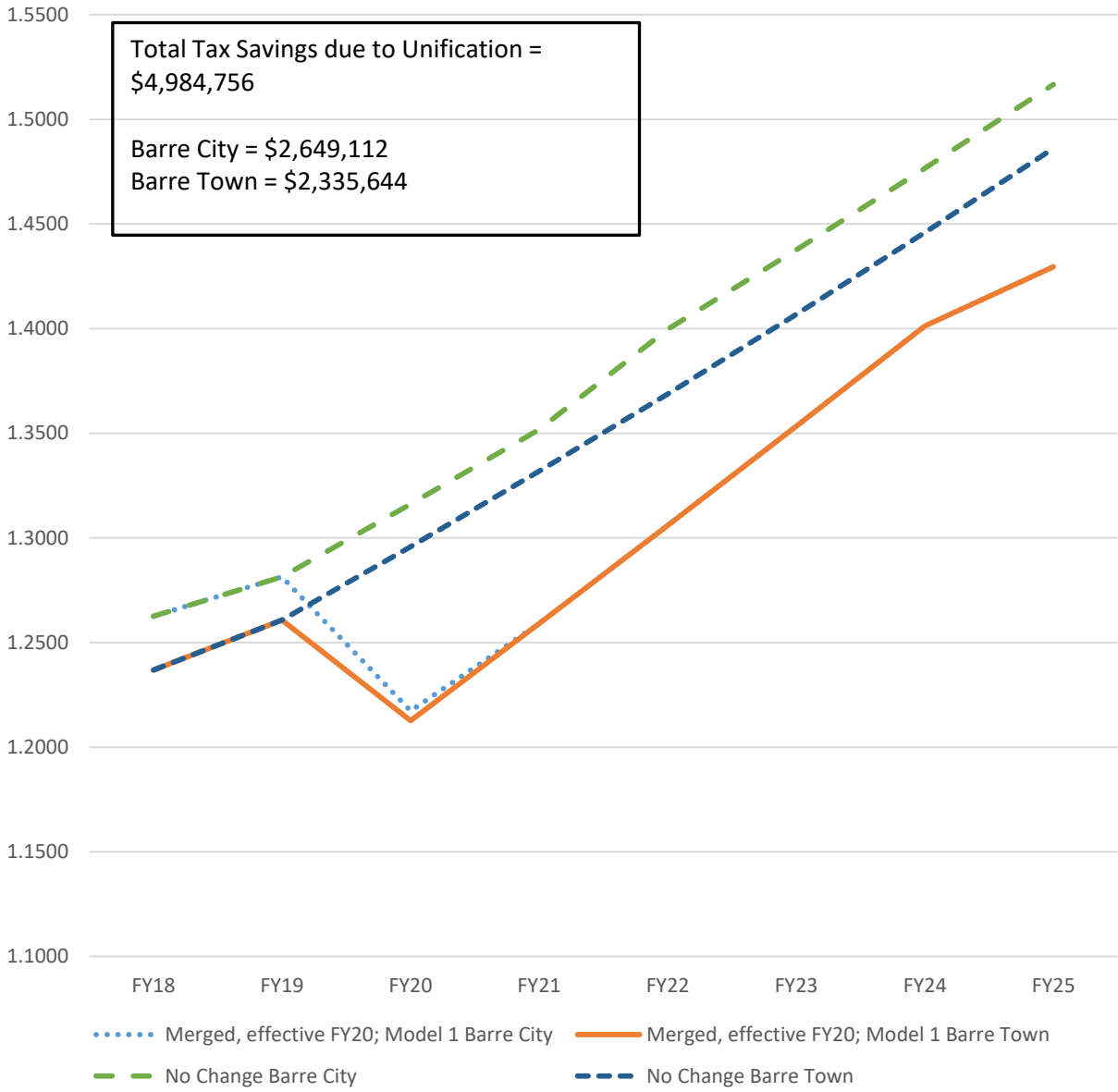
| | NOT Adjusted for CLA | |
|------------|----------------------|-----------|
| | Merged | No Change |
| Barre City | \$1.4296 | \$1.5167 |
| Barre Town | \$1.4296 | \$1.4861 |

Not Adjusted for CLA

| Unified Union; Model 1 | FY | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | Total |
|--------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Barre City | | | | | | | | | |
| Homestead Tax Rate | \$1.2627 | \$1.2814 | \$1.2173 | \$1.2591 | \$1.3060 | \$1.3534 | \$1.4012 | \$1.4296 | |
| Tax \$ (homestead) | \$6,214,427 | \$6,313,584 | \$6,016,971 | \$6,243,499 | \$6,496,786 | \$6,754,124 | \$7,015,046 | \$7,180,133 | |
| Tax savings due to unification | \$0 | \$0 | \$488,629 | \$459,745 | \$465,964 | \$420,107 | \$377,300 | \$437,367 | \$2,649,112 |
| Tax \$ on \$150K home | \$1,894 | \$1,922 | \$1,826 | \$1,889 | \$1,959 | \$2,030 | \$2,102 | \$2,144 | |
| Tax savings on \$150K home | \$0 | \$0 | \$148 | \$139 | \$141 | \$126 | \$113 | \$131 | \$798 |
| Barre Town | | | | | | | | | |
| Homestead Tax Rate | \$1.2369 | \$1.2608 | \$1.2127 | \$1.2591 | \$1.3060 | \$1.3534 | \$1.4012 | \$1.4296 | |
| Tax \$ (homestead) | \$7,487,977 | \$7,684,072 | \$7,451,617 | \$7,800,170 | \$8,157,062 | \$8,522,430 | \$8,895,781 | \$9,150,507 | |
| Tax savings due to unification | \$0 | \$0 | \$510,584 | \$450,615 | \$392,342 | \$336,449 | \$283,850 | \$361,802 | \$2,335,644 |
| Tax \$ on \$150K home | \$1,855 | \$1,891 | \$1,819 | \$1,889 | \$1,959 | \$2,030 | \$2,102 | \$2,144 | |
| Tax savings on \$150K home | \$0 | \$0 | \$125 | \$109 | \$94 | \$80 | \$67 | \$85 | \$560 |
| CTD TOTALS | | | | | | | | | |
| Tax \$ Raised in Town | \$13,702,404 | \$13,997,656 | \$13,468,589 | \$14,043,670 | \$14,653,847 | \$15,276,554 | \$15,910,827 | \$16,330,640 | \$117,384,187 |
| Tax savings due to unification | \$0 | \$0 | \$999,214 | \$910,360 | \$858,307 | \$756,556 | \$661,150 | \$799,170 | \$4,984,756 |
| No Change | | | | | | | | | |
| | FY16 | FY19 | FY20 | FY21 | FY22 | FY23 | FY24 | FY25 | Total |
| Barre City | | | | | | | | | |
| Homestead Tax Rate | \$1.2627 | \$1.2814 | \$1.3162 | \$1.3518 | \$1.3997 | \$1.4376 | \$1.4766 | \$1.5167 | |
| Tax \$ (homestead) | \$6,214,427 | \$6,313,584 | \$6,505,600 | \$6,703,244 | \$6,962,750 | \$7,174,231 | \$7,392,346 | \$7,617,500 | |
| Tax savings due to unification | | | | | | | | | |
| Tax \$ on \$150K home | \$1,894 | \$1,922 | \$1,974 | \$2,028 | \$2,100 | \$2,156 | \$2,215 | \$2,275 | |
| Tax savings on \$150K home | | | | | | | | | |
| Barre Town | | | | | | | | | |
| Homestead Tax Rate | \$1.2369 | \$1.2608 | \$1.2958 | \$1.3318 | \$1.3688 | \$1.4068 | \$1.4459 | \$1.4861 | |
| Tax \$ (homestead) | \$7,487,977 | \$7,684,072 | \$7,962,202 | \$8,250,785 | \$8,549,404 | \$8,858,879 | \$9,179,631 | \$9,512,310 | |
| Tax savings due to unification | | | | | | | | | |
| Tax \$ on \$150K home | \$1,855 | \$1,891 | \$1,944 | \$1,998 | \$2,053 | \$2,110 | \$2,169 | \$2,229 | |
| Tax savings on \$150K home | | | | | | | | | |

16-Jul-18

**Projections in Homestead Tax Rates FY'18 - FY'25
Barre City, Barre Town, Unified District
Based on Model and Not Adjusted for CLA**



Summary Observations:

In reviewing the data from the financial model, the Committee noted that:

- A. The numbers (equalized pupil counts, educational spending, yield figures, etc.) used in the model are not set in stone and a lot can happen with them. **The model was designed to predict trend lines not future tax rates.**
- B. Becoming a unified district would result in tax incentives (8, 6, 4, and 2 cents over four years off the homestead tax rate).
- C. All education spending and all equalized pupils throughout the Supervisory Union are combined to arrive at a unified homestead tax rate.
- D. The difference between the two trend lines for each community (“no change” vs. “merged”) represent the difference in that communities homestead tax rates predicted by the model.
- E. The property yield is the amount a district would be spending per pupil if its homestead tax rate was \$1.00. This year, the yield is \$10,220. The model is not designed to account for future variations in the yield so it is constant at \$10,220 throughout the modeling years. Using a constant value potentially creates a conservative estimate in future tax savings.
- F. Local tax rates will be different depending on the Common Level of Appraisal (CLA) in each community. The model is set for no change in the CLA over the next five years.
- G. Changes in the grand list affect the actual homestead tax rate. If the grand list changes the results of the model projection will change. The model uses a growth rate for each grand list calculated from the average change over the past six years.
- H. Changes in equalized pupils and gross education spending affect the tax rate. In terms of equalized pupils, over the last six years, Barre City has *grown* by .46% per year, while Barre Town has seen a *decline* in its student population of .14% per year – a net difference of 0.6%. As a result, over the past five year’s gross education spending in Barre City has averaged a 3.25% increase per year to meet the needs of a larger school population, while Barre Town has averaged an increase of 2.74% per year.
- I. However, in terms of Education Spending per Equalized Pupil, the key figure that determines each district’s homestead tax rate, the average rate of change has been nearly identical in both communities (2.78% in Barre City vs. 2.89% in Barre Town) over the past six years. In addition, in FY’19 the Education Spending per Equalized Pupil for both districts is, itself, almost identical {in FY’19 the Barre City value is \$12,919 and the Barre Town value is \$12,591} among the lowest spending ratios in Vermont. In FY’19 the state average in Education Spending per Equalized Pupil is \$15,520, as reported from the Vermont Agency of Education. These figures illustrate the high level of fiscal responsibility exhibited by both Barre City and Barre Town. At Spaulding the FY’17 cost per pupil is \$13,491, also among the lowest in the state.

- J. The education spending rate used in the model for the new district is 2% versus the aggregate growth in educational spending of 2.90%. Over the next six years, the model predicts that this modest savings in the growth of educational spending of about 0.9% could generate savings of 2.2 million dollars for the new unified district [it should be emphasized that this is a prediction based on the limits of this model]. FY2020 is the assumed date that the new district comes into existence. \$13,212 is the estimated per pupil education spending in year one.
- K. The law says a town's homestead tax rate can only go up or down 5.0% from the previous year's homestead rate, prior to adjustment by the CLA, until the town's homestead rate meets the unified rate. In the model, Barre Town gets the full benefit of the 8 cent drop in the homestead tax rate in the first year because its change is smaller than 5%, but Barre City does not receive the full benefit of the 8 cent drop because it is slightly impacted by the 5.0% limit; its effective tax drop is 7.5 cents. In subsequent years, each district gets the full benefit of the tax incentives at 6 cents, 4 cents, and 2 cents in years 2, three and 4 respectively..
- L. By FY2025, all the incentives are gone, and the homestead tax rate in the new unified district is the same for both communities. Homestead tax rates effectively become equivalent in FY2021, according to the model.
- M. Based on the model, if nothing changes the homestead tax rate (not adjusted for CLA) for Barre City is *projected* over the next six years to go from 1.2814 to 1.5167; Barre Town, from 1.2608 to 1.4861 compared to a unified tax rate for both districts in FY'25 of 1.4296, a difference of approximately 9 cents in Barre City and 6 cents in Barre Town.
- N. Based on the model, this translates into a *projected* total tax savings for both districts, of approximately \$4,984,756.
- O. Based on the model, for Barre City the projected total tax savings is \$2,649,112; for Barre Town the total is \$2,335,644. In terms of a \$150,000 house, the *projected* savings over six years in Barre City is \$798; in Barre Town it is \$560.

Final Note: It is worth repeating that the model used to forecast these results was created for purposes of comparative illustrations, and under no circumstances should be relied upon to forecast future actual tax rates resulting if and when a merger occurs or does not occur. It is also worth noting, that actual operational savings due to unification could be reinvested by the new unified union board to improve the level of educational opportunity in Barre without having to raise additional resources, changing the actual tax savings projected over the next six years.

TRANSITION PLANNING

Upon an affirmative vote of the electorate in both Barre City and Barre Town on November 6, 2018 and certification of the final vote of each district by the Vermont Secretary of Education to the Vermont Secretary of State per 16 VSA § 706g, the new Barre Unified Union School District would come into existence and have all of the authority necessary for it to prepare for full educational operations beginning on July 1, 2019.

The Barre Unified Union School District would, between the date of its first organizational meeting under 16 VSA – 706j and June 30, 2019, undertake all of the planning and related duties necessary to begin operations of the new unified union school district on July 1, 2019, including:

- a. Preparing for and negotiating contractual agreements;
- b. Preparing and presenting a budget to the voters for Fiscal Year 2020;
- c. Preparing for the Barre Unified Union School District annual meeting, March 5, 2019;
- d. Transacting any other lawful business that comes before the Board.

The authority exercised by the new Barre Unified Union School District shall not limit or alter the ongoing authority and/or responsibilities of the school boards that make up the current Supervisory Union which will remain in existence during the transition period for the purpose of completing any and all business not given under law to the new unified union district board. In essence, each individual district board would maintain its current authority until the new district becomes operational on July 1, 2019. The existing districts and supervisory union will remain in operation after July 1, 2019 only to conclude any business.

In summary, an affirmative vote of the electorate in both Barre City and Barre Town would also result in, but not be limited to, the following:

- a. Employees throughout the current Supervisory Union offered continuing employment following the 2018-2019 school year, consistent with all legal requirements, would become employees of the new Barre Unified Union School District.
- b. All assets of the pre-existing districts would be transferred to the new unified union district for the sum of \$1.00 as of July 1, 2019.
- c. Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the new unified union district as of July 1, 2019.
- d. Following the certification of the election results by the Agency of Education to the Secretary of State (30-45 days after the vote), an organizational meeting of the new unified district would be convened by the Secretary of the Agency of Education or designee in accordance with Title 16, 706j.
- e. The newly elected members of the Barre Unified Union School District, consistent with statute, would begin the work of preparing for the district's first day of operations - hiring a superintendent, defining administrative and operational roles and responsibilities, establishing

policy, negotiating contracts, developing budgets, and establishing new structures for community engagement.

- f. Through June 30, 2019, the four pre-existing boards of the supervisory union would continue to govern their respective districts and/or schools. The existing districts and supervisory union will remain in operation after July 1, 2019 only to conclude any business.

ARTICLES OF AGREEMENT

**Articles of Agreement
Barre Unified Union District**

The Barre Supervisory Union Act 46 Study Committee recommends the following Articles of Agreement for the creation of a Pre-Kindergarten through grade 12 unified union school district, to be named the Barre Unified Union School District. The forming districts are the Barre City School District, Barre Town School District, and the Spaulding Union High School District. As Barre City and Barre Town are the only members of the Spaulding Union High School District, an affirmative vote in both town districts shall bring it into the merged district.

Article 1: Necessary Forming School Districts

The School Districts of Barre City, Barre Town, and the Spaulding Union High School District are necessary for the establishment of the Barre Unified Union School District. The above referenced school districts are hereinafter referred to as the “forming districts”.

Article 2: Additional Districts

No additional districts are included in the proposed Barre Unified Union School District.

Article 3: Grades to Operate

The Barre Unified Union School District will operate grades Pre-Kindergarten through grade 12, including the Central Vermont Career Center.

Article 4: Proposed New School Construction

No new schools are proposed to be constructed as part of the formation of the Barre Unified Union School District.

Article 5: Plan for First Year of Operation

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

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

Article 6: Indebtedness of Member Districts

A. Capital Debt

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

B. Operating Fund Surpluses, Deficits and Reserve Funds

The Barre Unified Union District shall assume any and all operating deficits, surpluses, and fund balances of the forming districts that may exist on the close of business on June 30, 2019. In addition, reserve funds identified for specific purposes will be transferred to the Barre Unified Union District, and will be applied for lawful district purposes unless otherwise designated through lawful conditions of use.

C. Restricted Funds:

The Barre Supervisory Union and the forming school districts will transfer to the Barre Unified Union District any preexisting specific endowments or other restricted accounts, including student activity and related accounts, held by school districts that may exist on June 30, 2019. Scholarship accounts or similar accounts, held by school districts prior to June 30, 2019, that have lawful specified conditions of use will be used in accordance with said provisions.

Article 7: Real and Personal Property

A. Transfer of Property to the Unified District:

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

B. Subsequent Sale of Real Property to Towns:

In the event that, and at such subsequent time as, the Barre Unified Union Board of Directors determines, in its discretion, that continued possession of the real property, including land and buildings, conveyed to it by one or more of the necessary forming districts will not be used in direct delivery of student educational programs, the Barre Unified Union School District shall offer for sale such real property to the town/city in which such real property is located, for the sum of one dollar, subject to all encumbrances of record, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants required by Vermont law, in addition to repayment of costs of capital improvements subsequent to July 1, 2019 as explained in the next paragraph. Article 13 of these Articles of Agreement addresses the conditions under which a building may be closed.

The conveyance of any of the above school properties shall be conditioned upon the town owning and using the real property for community and public purposes for minimum of five years after conveyance to the municipality. In the event the town elects to sell the real property prior to five years of ownership, the town/city shall compensate the Unified District for all capital improvements and renovations completed after the formation of the Unified District prior to the sale to the town. In the event a municipality elects not to acquire ownership of such real property, the Unified District shall, pursuant to Vermont law, sell the property upon such terms and conditions as established by the Barre Unified Union School District Board of School Directors.

Article 8: Board of School Directors Representation

The Board of School Directors shall have nine (9) members, with four (4) residing in and representing Barre City; four (4) residing in and representing Barre Town; and one (1) elected at-large by the voters of both municipalities. The Barre Town and Barre City specific numbers of directors are consistent with current census figures. Each time there is a new decennial census, the proportionality of the Barre Town and Barre City specific numbers of directors shall be aligned to the new counts if necessary.

The Board member elected at-large shall be subject to voting by the electorate in both forming districts, with the candidate receiving the highest vote total prevailing. The eight Board members representing a specific municipality shall be subject to voting only in their municipality of residence, with the candidate(s) receiving highest vote totals prevailing.

Article 9: Initial Directors Terms of Office

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

| Town | Term ending March <u>2020</u> | Term ending March <u>2021</u> | Term ending March <u>2022</u> |
|-------------|--|--|--|
| Barre City | 2 | 1 | 1 |
| Barre Town | 1 | 2 | 1 |
| At- Large | 0 | 0 | 1 |

The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting to be held in the spring of 2019.

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

Nominations for the office of the at-large School Director shall be made by filing a statement of nomination signed by at least 60 voters from one or more of the forming districts with the clerk of any district/town proposed as a necessary member of the Unified District. A statement shall be filed not fewer than 30, nor more than 40 days prior to the date of the vote.

Pursuant to the provisions of 16 V.S.A. – 706j(b), directors initially elected to the new district shall be sworn in and assume the duties of their office.

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

Article 10: Submission to Voters

The proposal forming the Barre Unified Union School District will be duly warned and presented to the voters of each town school district on November 6, 2018. The vote shall take place in each of the school districts by Australian ballot.

Article 11: Commencement of Operations

Upon an affirmative vote of the electorates of the forming districts and upon compliance with 16 VSA – 706g, the Barre Unified Union School District shall have and exercise all of the authority which is necessary in for it to prepare for full educational operations beginning on July 1, 2019. The Barre Unified Union School District shall, between the date of its organizational meeting under 16 VSA – 706j and June 30, 2019, undertake planning and related duties necessary to begin operations of the new unified union school district on July 1 2019, including preparing for and negotiating contractual

agreements, preparing and presenting the budget for fiscal year 2020, preparing for the Barre Unified Union School District annual meeting and transacting any other lawful business that comes before the Board, provided however, that the exercise of such authority by the Barre Unified Union School District shall not be construed to limit or alter the authority and/or responsibilities of the school districts that will form the new unified union school district and that will remain in existence during the transition period for the purpose of completing any business not given to the Barre Unified Union School District.

On July 1, 2019, when the Unified District becomes fully operational and begins to provide educational services to students, the school districts of the forming towns and the union high school shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the Unified District under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2019. Upon the completion of outstanding business or December 31, 2019, whichever date is earlier, the forming school districts shall cease to exist pursuant to 16 VSA §722. The Barre Supervisory Union shall cease all operations within a reasonable timeframe of the completion of all outstanding business of its member school districts, but in no event any later than January 31, 2020.

Article 12: Australian Ballot Voting

The Barre Unified Union School District shall vote the annual school district budget and public questions by Australian ballot. In the Australian ballot voting, the ballots shall not be commingled between Barre City and Barre Town, with each merging district's votes to be counted separately before a determination of total combined votes.

Article 13: School Restructuring and Closing

Any proposal by the district's new unified board of directors to restructure the district's current elementary school configuration into one elementary and one middle school may not be considered without the approval of the electorate of the Barre Unified Union School District. Any proposal by the district's new unified board of directors to close any school in the district may not be considered without the approval of the electorate of the Barre Unified Union School District.

Article 14: Redistricting/Choice

Students in elementary schools (PreK-8) will not be required to attend school outside of their current town of residency. Students and their families may voluntarily request assignment at another elementary school (Prek-8) according to policies on intra-district choice established by the Board.

Article 15: Local Input

The new unified board shall ensure ongoing opportunities for local input on policy, budget development, and other topics relevant to the operation of the schools. Structures to support and encourage public participation within the Barre Unified Union School District, such as site-based or school-based councils, will be established by the Board prior to the commencement of operation of the Barre Unified Union School District.

APPENDICES

Appendix 1: District Real Property - Assets and Liabilities

| Barre Supervisory Union 3/23/18 | | | | | | |
|---|--|---------------------------------|---|-----------------------|---|--|
| Summary of Buildings, Contents and Site Values, Long Term Debt, and Reserve Funds | | | | | | |
| | Total Insurance Value of Buildings, Contents and Site Improvements | Less Total Long Term Debt/Lease | Buildings, Content and Site Improvements Less Long Term Debt and Capital Leases | FY18 Equalized Pupils | Capital Asset Value Less Long Term Debt Per Equalized Pupil | |
| Barre Supervisory Union | \$ 1,319,600 | - | \$ 1,319,600 | 0 | \$ - | |
| Barre City | \$ 20,547,600 | \$ 5,40,000 | \$ 20,007,600 | 87,277 | \$ 22,924 | |
| Barre Town* | \$ 25,551,200 | - | \$ 25,551,200 | 789,955 | \$ 32,472 | |
| Spaulding Union High School | \$ 42,484,300 | \$ 2,729,825 | \$ 39,754,475 | 761.4 | \$ 52,212 | |
| Total All Member Districts | \$ 90,002,700 | \$ 3,259,825 | \$ 86,732,875 | 2424.12 | \$ 35,779 | |
| Fund Balances (audited) as of 6/30/17. | | | | | | |
| Barre Supervisory Union | \$ 132,498 | - | - | - | - | Capital Asset Value Less Long Term Debt Per EP Including Maint. Reserve \$ 1,452,098 |
| Barre City | \$ (39,490) | \$ 330,083 | \$ 243,381 | \$ 533,965 | \$ 20,541,565 | \$ 23,536 |
| **Barre Town | \$ 731,974 | \$ 38,424 | \$ 376,008 | \$ 1,146,406 | \$ 26,797,606 | \$ 33,923 |
| Spaulding Union High School | \$ (43,512) | \$ 527,626 | \$ 100,467 | \$ 604,581 | \$ 40,339,056 | \$ 52,980 |
| Total All Member Districts | \$ 781,461 | \$ 896,133 | \$ 719,856 | \$ 2,284,952 | \$ 89,130,325 | \$ 36,768 |

FUTURE CONSIDERATIONS

BTMES athletic fields transferred to Town of Barre-pending reappraisal by Assessor's office.

** Assigned to Rev. in FY18 BSU-\$100,000, BC-\$250,000, BT \$500,000, SHS \$400,000

**BT spent capital improvement funds summer FY17

**Appendix 2A: Comparison of 2016 Smarter Balanced Assessment Data
Aggregated and Dis-Aggregated for Free & Reduced Lunch
Barre Town School vs. Barre City School**

| School | Grade | All % Proficient | | FRL # Students | FRL % Proficient | NFRL # Students | NFRL % Proficient |
|-------------------|-------|------------------|--|----------------|------------------|-----------------|-------------------|
| Barre Town | | | | | | | |
| ELA | 3 | 56 | | 17 | 53 | 63 | 57 |
| | 4 | 70 | | 23 | 61 | 51 | 75 |
| | 5 | 68 | | 19 | 63 | 56 | 69 |
| | 6 | 61 | | 21 | 38 | 65 | 69 |
| | 7 | 57 | | 24 | 38 | 73 | 63 |
| | 8 | 78 | | 19 | 68 | 69 | 81 |
| Totals/Ave | | ~65% | | 123 | ~54% | 377 | ~69% |
| Math | | | | | | | |
| | 3 | 66 | | 17 | 59 | 63 | 68 |
| | 4 | 66 | | 23 | 57 | 51 | 71 |
| | 5 | 35 | | 19 | 32 | 56 | 35 |
| | 6 | 34 | | 21 | 10 | 55 | 42 |
| | 7 | 46 | | 24 | 25 | 65 | 53 |
| | 8 | 64 | | 19 | 37 | 69 | 71 |
| Totals/Ave | | ~52% | | 123 | ~37% | 377 | ~57% |
| Barre City | | | | | | | |
| ELA | 3 | 51 | | 61 | 46 | 37 | 59 |
| | 4 | 35 | | 48 | 17 | 30 | 63 |
| | 5 | 40 | | 51 | 24 | 38 | 63 |
| | 6 | 43 | | 47 | 32 | 25 | 64 |
| | 7 | 49 | | 43 | 26 | 41 | 73 |
| | 8 | 50 | | 44 | 34 | 28 | 75 |
| Totals/Ave | | ~45% | | 294 | ~30% | 199 | ~66% |
| Math | | | | | | | |
| | 3 | 60 | | 60 | 52 | 37 | 73 |
| | 4 | 47 | | 48 | 38 | 30 | 63 |
| | 5 | 28 | | 50 | 16 | 38 | 45 |
| | 6 | 38 | | 47 | 28 | 25 | 56 |
| | 7 | 42 | | 42 | 36 | 41 | 59 |
| | 8 | 43 | | 45 | 33 | 28 | 57 |
| Totals/Ave | | ~43% | | 292 | ~34% | 199 | ~59% |

**Appendix 2B: Comparison of 2017 Smarter Balanced Assessment Data
Aggregated and Dis-Aggregated for Free & Reduced Lunch
Barre Town School vs. Barre City School**

| School | Grade | All % Proficient | | FRL # Students | FRL % Proficient | NFRL # Students | NFRL % Proficient |
|-------------------|-------|------------------|--|----------------|------------------|-----------------|-------------------|
| Barre Town | | | | | | | |
| ELA | 3 | 51 | | 31 | 42 | 42 | 57 |
| | 4 | 55 | | 25 | 44 | 63 | 59 |
| | 5 | 63 | | 30 | 47 | 49 | 73 |
| | 6 | 59 | | 23 | 70 | 56 | 55 |
| | 7 | 58 | | 20 | 45 | 63 | 62 |
| | 8 | 61 | | 30 | 37 | 70 | 71 |
| Totals/Ave | | ~58% | | 159 | ~48 % | 343 | ~63% |
| Math | | | | | | | |
| | 3 | 56 | | 31 | 52 | 42 | 60 |
| | 4 | 66 | | 24 | 54 | 63 | 70 |
| | 5 | 57 | | 30 | 40 | 49 | 67 |
| | 6 | 47 | | 23 | 57 | 56 | 43 |
| | 7 | 38 | | 19 | 5 | 63 | 48 |
| | 8 | 57 | | 30 | 33 | 70 | 76 |
| Totals/Ave | | ~54% | | 157 | ~40% | 343 | ~61% |
| Barre City | | | | | | | |
| ELA | 3 | 51 | | 61 | 46 | 15 | 67 |
| | 4 | 42 | | 57 | 33 | 31 | 58 |
| | 5 | 33 | | 46 | 20 | 18 | 67 |
| | 6 | 45 | | 52 | 29 | 31 | 71 |
| | 7 | 46 | | 43 | 33 | 25 | 68 |
| | 8 | 49 | | 46 | 28 | 36 | 75 |
| Totals/Ave | | ~44% | | 305 | ~32% | 156 | ~68% |
| Math | | | | | | | |
| | 3 | 58 | | 61 | 51 | 18 | 56 |
| | 4 | 59 | | 57 | 56 | 31 | 65 |
| | 5 | 60 | | 46 | 13 | 18 | 56 |
| | 6 | 23 | | 52 | 13 | 31 | 39 |
| | 7 | 44 | | 43 | 40 | 25 | 52 |
| | 8 | 48 | | 45 | 27 | 36 | 75 |
| Totals/Ave | | ~47% | | 304 | ~33% | 159 | ~57% |

Appendix 3: SUMMARY FINANCIAL AND ENROLLMENT DATA

Barre Supervisory Union - School District Data

| | Spaulding High School | Barre City School | Barre Town School | Vermont |
|---|-----------------------|-------------------|-------------------|-----------|
| Grades Served | 9-12 | PreK-8 | PreK-8 | PreK-12 |
| FY'17 ADM | 682.54 | 886.78 | 856.23 | 87,412.64 |
| FY'17 (Ed.Spending/Eq.Pupil) | 12,891.73 | 11,862.28 | 11,860.45 | 14,651 |
| FY'17 Student-to-Teacher Ratio | 12.18 | 11.57 | 15.05 | 10.57 |
| FY'17 Student-to-Adult Ratio | n/a | n/a | n/a | n/a |
| FY'17 Teacher-to-Administrator Ratio | 6.11 | 25.73 | 19 | 9.53 |
| FY'17 Student-to-Administrator Ratio | 74.44 | 297.67 | 286 | 100.65 |
| FY'17 Ave. Teacher Salary (\$52,838 for S.U.) | \$51,295 | \$51,213 | \$54,674 | \$59,073 |
| | | | | |
| FY'16 ADM | 664.41 | 878.34 | 838.45 | 86,967.87 |
| FY'16 (ES/EP) | 12,474.12 | 11,495.58 | 11,594.65 | 14,008.54 |
| FY'16 Student-to-Teacher Ratio | 10.36 | 8.73 | 11.3 | 10.45 |
| FY'16 Student-to-Adult Ratio | n/a | n/a | n/a | n/a |
| FY'16 Teacher-to-Administrator Ratio | 4.58 | 33.58 | 24.6 | 9.4 |
| FY'16 Student-to-Administrator Ratio | 47.43 | 294 | 268 | 98.26 |
| FY'16 Ave. Teacher Salary (\$49,033 for S.U.) | \$52,114 | \$49,096 | \$51,888 | \$57,063 |
| | | | | |
| FY'15 ADM | 725.02 | 890.44 | 848.44 | 88,981.85 |
| FY'15 (ES/EP) | 12,448.12 | 11,361.68 | 11,093.98 | 14,008.54 |
| FY'15 Student-to-Teacher Ratio | 10.32 | 9.1 | 10.7 | 10.6 |
| FY'15 Student-to-Adult Ratio | n/a | n/a | n/a | n/a |
| FY'15 Teacher-to-Administrator Ratio | 4.64 | 32.3 | 26.3 | 9.9 |
| FY'15 Student-to-Administrator Ratio | 47.87 | 294 | 282 | 104 |
| FY'15 Ave. Teacher Salary (\$49,033 for S.U.) | \$50,237 | \$46,488 | \$51,249 | \$56,355 |
| | | | | |
| FY '14 ADM | 735.19 | 898.09 | 868.54 | 82,522.83 |
| FY '14 (ES/EP) | 12,340.20 | 11,474.63 | 11,055.10 | 13,546.44 |
| FY'14 Student-to-Teacher Ratio | 9.7 | 9.7 | 11.0 | 10.6 |
| FY'14 Student-to-Adult Ratio | 5.8 | 5.04 | 6.9 | 5.3 |
| FY'14 Teacher-to-Administrator Ratio | 6.86 | 30.9 | 26 | 9.9 |
| FY'14 Student-to-Administrator Ratio | 66.55 | 300.7 | 285.3 | 105 |
| FY'14 Ave. Teacher Salary (\$49,635 for S.U.) | \$48,326 | \$46,377 | \$55,531 | \$55,903 |
| | | | | |
| FY'13 ADM | 731.30 | 914.16 | 861.50 | 83,139.20 |
| FY'13 (ES/EP) | 11,580.03 | 10,959.55 | 10,610.68 | 12,788.90 |
| FY'13 Student-to-Teacher Ratio | 7.6 | 10.2 | 10.9 | 10.7 |
| FY'13 Student-to-Adult Ratio | 5.1 | 5.7 | 6.9 | 5.5 |
| FY'13 Teacher-to-Administrator Ratio | 26.67 | 45.3 | 26 | 9.7 |
| FY'13 Student-to-Administrator Ratio | 202.5 | 465 | 285 | 103 |
| FY'13 Ave. Teacher Salary (\$44,415 for S.U.) | \$40,761 | \$46,327 | \$47,973 | \$54,420 |
| | | | | |
| NOTE: The source of this table is the School Report data from the Vermont Agency of Education | | | | |

Appendix 4: Enrollment Data for Barre Supervisory Union Schools

| <u>Grade</u> | Barre Town School | Barre City School | Spaulding HS |
|----------------|--------------------------|--------------------------|---------------------|
| PreK | 129 | 119 | |
| K | 84 | 114 | |
| 1 | 95 | 115 | |
| 2 | 72 | 118 | |
| 3 | 100 | 97 | |
| 4 | 78 | 86 | |
| 5 | 99 | 96 | |
| 6 | 84 | 80 | |
| 7 | 88 | 94 | |
| 8 | 92 | 76 | |
| 9 | | | 216 |
| 10 | | | 189 |
| 11 | | | 171 |
| 12 | | | 187 |
| Post-12 | | | 9 |

**Appendix 5: Curriculum Comparison between
Barre City School and Barre Town School**

| Grade Span | Curriculum |
|-------------------|--|
| PreK | <ul style="list-style-type: none"> • Common Curriculum and Assessment • Both programs supervised and coordinated by BSU Early Education Director • Both programs have completed MTSS pilot |
| K to 4 | <ul style="list-style-type: none"> • Common Math Curriculum (coordinated by Math Curriculum Specialist) • Common Language Arts Curriculum (coordinated by Literacy Curriculum Specialists) <ul style="list-style-type: none"> • Common Science Curriculum • Common Social Studies Curriculum (close alignment in 3 and 4) <ul style="list-style-type: none"> • Social & Emotional Curriculum |
| | <ul style="list-style-type: none"> • Specials Curriculum – cross- school alignment in progress <ul style="list-style-type: none"> • Art • Music/Band • P.E. • Library • Health/Counseling |
| 5 to 8 | <ul style="list-style-type: none"> • Common Math Curriculum (coordinated by Math Curriculum Specialist) • Common Language Arts Curriculum (coordinated by Literacy Curriculum Specialists) <ul style="list-style-type: none"> • Common Science Curriculum • Common Social Studies Curriculum |
| | <ul style="list-style-type: none"> • Specials Curriculum – alignment in progress <ul style="list-style-type: none"> • Art / Design Lab • Music/Band • P.E. • Family & Consumer Science <ul style="list-style-type: none"> • Technology Education • Spanish • Social Emotional Curriculum DD (common) <ul style="list-style-type: none"> • Enrichment Blocks 40 min/day BC • Personal Learning Plans |

Appendix 6: Community Outreach

- I. Act 46 Committee Meetings (all warned and open to the public):**
 - **February 28, 2018**
 - **March 14, 2018**
 - **March 28, 2018**
 - **April 10, 2018**
 - **April 26, 2018**
 - **May 10, 2018**
 - **May 24, 2018**
 - **June 6, 2018**
 - **June 18, 2018**
 - **June 25, 2018**
 - **July 16, 2018**
 - **July 30, 2018**

- II. Media Outreach**
 - **Barre Act 46 Web Page: <http://bsuvt.org/joomla/index.php/act-46>**
 - **Front Porch Forum Postings**
 - **School Newsletters and Mailings**
 - **Letters to the Editor; Barre-Montpelier Times Argus**
 - **Radio Public Service Announcements**

- III. Additional Planned Outreach for September & October**
 - **Information tables at school athletic, co-curricular, and other events**
 - **Presentations to service and other local organizations**
 - **Newspaper inserts and advertisements**
 - **Postcard mailing to registered voters**
 - **Lawn signs**
 - **Exit poll**
 - **Post-vote online survey**

Appendix 7

PREVIOUS STUDY COMMITTEE

**BARRE UNIFIED SCHOOL DISTRICT
ACT 46 STUDY COMMITTEE – FINAL REPORT
OCTOBER 6, 2016**

Barre Supervisory Union

120 Ayers Street
Barre Vt, 05641



BCEMS



BTMES

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BSU ACT 46 STUDY COMMITTEE MEMBERS

Co- Chairs

Alice Farrell – Barre Town Community Representative

Tommy Walz – Barre City Community Representative

Members

Chad Allen – Barre Town Board Member

Giuliano Cecchinelli – Barre City Board Member

Alice Farrell – Barre Town Community Representative

Lucas Herring – Barre City, SHS Board Member

David LaCroix – Barre Town, SHS Board Member

Kerri Lamb – Barre Town Community Representative

Jay Paterson – Barre Town Board Member

Ed Rousse – Barre City Community Representative

Sonya Spaulding – Barre City Board Member

Tommy Walz – Barre City Community Representative

Administrative and Consultant Support

John Pandolfo – Superintendent of Schools

Peter Clarke – Act 46 Consultant

Additional Exploratory Phase Members

Ashlyn Smith – Barre City Community Representative

Mark Tatro – Barre City, SHS Board Member

Brent Tewksbury – Barre Town Board Member

EXECUTIVE SUMMARY

Introduction:

Currently the needs and interests of Barre students are served by four distinct governance bodies: 2 local elementary school boards, representing the communities of Barre City and Barre Town; one high school union board overseeing the operation of Spaulding Union High School and the Central Vermont Career Center; and one board overseeing the affairs of the entire Barre Supervisory Union.

Act 46 is a far reaching piece of legislation designed to encourage school districts to explore the potential benefits of unifying their existing governance structures into a single school board responsible for serving every student in the current supervisory union. It is a bill whose central goal is improving the educational quality of those schools at an affordable and sustainable cost that taxpayers will value.

In the summer of 2015, the school boards of Barre City and Barre Town voted to form an Exploratory Study Committee, representing both districts, to review and assess current patterns of governance within the Supervisory Union given the new requirements of Act 46. To facilitate this study, the committee secured a consultant, Mr. Peter A. Clarke, from the *Act 46 Project*, a joint initiative of the Vermont School Boards Association, Vermont Superintendents Association, and Vermont School Board's Insurance Trust. At the end of the exploratory study, both districts moved ahead with a full 706b merger study to decide whether putting proposed Articles of Agreement for a new unified union district was in the interest of both communities.

Over the past 16 months, the Committee met monthly in open session. The consultant visited each school in the district and interviewed members of the S.U.'s administrative team, as well as, members of the school boards of Barre City, Barre Town, and Spaulding High School in order to identify key issues for committee deliberation.

The committee has attempted to maintain a transparent record of its work through the ongoing posting to the S.U.'s website of its meeting schedule, minutes, working documents, and draft findings. Prior to the completion of this report, the committee held public forums and undertook community surveys on a variety of issues related to district unification in order to elicit comment on its findings and used that feedback to revise and strengthen its final report and recommendation. Finally, the Committee submitted its final report to the school boards of Barre City and Barre Town for review and comment.

Central to the committee's deliberations concerning any potential plan to unify Barre's current Supervisory Union structure into a single unified district governed by a single school board was one central overriding question:

How would unification benefit our children? Specifically, how would a new, unified district governance structure provide better, more equitable instructional opportunities and better support students to achieve or exceed the State's Educational Quality Standards at a cost that parents, voters, and taxpayers value?

Summary Committee Findings/Recommendations:

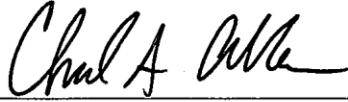
After a thorough review of the educational, operational, fiscal, and cultural opportunities and challenges that could result due to unifying the current supervisory union under the leadership of a single school board, Barre's joint 706 Study Team voted unanimously to put Articles of Agreement to form a new unified union school district before the voters of Barre City and Barre Town for their consideration.

The Committee believes that unification will result in even greater educational opportunities for all Barre children, create real efficiencies in educational delivery, and result in significant and ongoing savings, particularly in the long-term growth in educational spending, for the taxpayers of both communities. Among the benefits identified in the Committee's study:

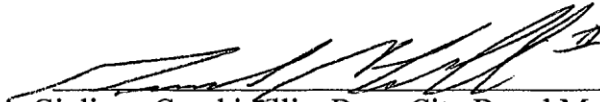
- A. Barre City and Barre Town already share a high school. Unification would further the development of a single PreK-12 educational vision for all students and the important work of strengthening and aligning the educational programs. It will increase opportunities for sharing best practice and supporting teachers throughout the district. Greater focus on the big picture, along with better coordination of the programs and services offered - specifically regarding the way we plan and implement curriculum, programs, policies, and procedures across three schools – will result in an even better education for all students.
- B. Operational efficiency should result by utilizing already existing resources to provide for an increase in the quality and equity of educational opportunities for Barre students without increasing the level of taxpayer support needed to achieve those same goals.
- C. Unification would allow the Superintendent and the district's full administrative team to focus more on leading and developing the district's educational programs than the day to day administrative work of preparing, coordinating, and serving the policy and administrative needs of multiple school boards (e.g. 4 budgets, multiple board meetings, etc.). Over the long term, this might also help us attract and retain good leaders.
- D. A single, unified board could prioritize the ongoing capital needs of the entire district (technology infrastructure, building repairs, future school renovations). This would ensure that the district's educational programs get the investments in technology and infrastructure they need to deliver a quality education to every Barre student, supported by the increased efficiencies and economies of scale that attend a larger, more operationally streamlined district.
- E. Continuing and increasing coordination of Special Education services, PreK-12, would effectively address the specific needs of students with disabilities.

Among the challenges identified in the report is the important work of creating a new, unified sense of community identity and culture within the new Barre Unified Union School District (Goal 3, page 12). But, the Committee views this challenge within the long history of growing cooperation between the two communities and sees unification as the next important and logical step forward of both communities working together for the benefit of all.

Signatures of Members of the BSU Act 46 Study Committee



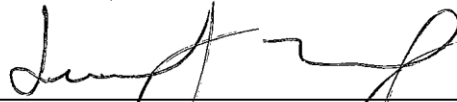
Chad Allen – Barre Town Board Member



Giuliano Cecchinelli – Barre City Board Member



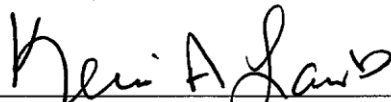
Alice Farrell – Barre Town Community Representative



Lucas Herring – Barre City, SHS Board Member



David LaCroix – Barre Town, SHS Board Member



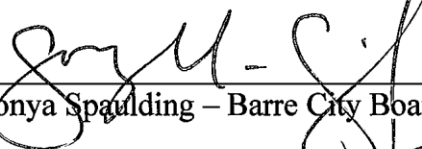
Kerri Lamb – Barre Town Community Representative



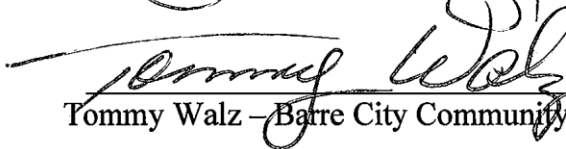
Jay Paterson – Barre Town Board Member



Ed Rousse – Barre City Community Representative



Sonya Spaulding – Barre City Board Member



Tommy Walz – Barre City Community Representative

(Insert

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

RECEIVED

SEP 26 2016

Barre Supervisory Union
District # 61

September 22, 2016

Superintendent John Pandolfo
Barre Supervisory Union
120 Ayers St.
Barre, VT 05641

Re: Proposed New Unified School District Board Membership

Dear Mr. Pandolfo:

I am writing to discuss the current proposal set forth by Barre Supervisory Union (BSU) pertaining to Board membership of the Barre Unified School District and whether it meets the requirements of the Equal Protection Clause of the United States Constitution.

The BSU Act 46 Study Committee members have drafted Articles of Agreement, as required by the Vermont Agency of Education, proposing creation of a Supervisory District pursuant to Act 46. Article 9 establishes the initial membership of each merging district on the Unified School District Board of Directors. The Board will have four members from each merging district, with one at-large member, for a total of 9 members.

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 a local school official who exercises 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 current apportionment plan set forth in Article 9 provides for Barre City, with a population of 9,052 (53% of the total USD population) with four votes. Barre Town with a population of 7,924 (47% of the total USD population), with four votes. There will be one at-large vote subject to combined voting in the merging districts. While this may depart from the 10% discussed above for proportional representation, it should be permissible. To the extent that if Barre Town were to receive a fifth vote from at-large voting, I do not expect any challenge as that at-large vote includes voters in Barre City. Accordingly, there is no deviation in excess of the permissible limits.

Superintendent John Pandolfo
September 22, 2016
Page 2

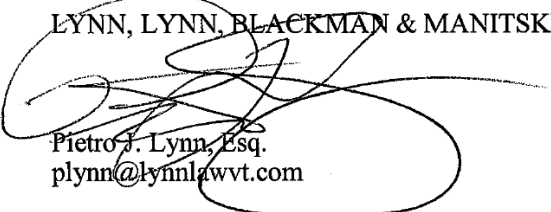
Furthermore, there is no indication that any specific group of people are being discriminated against based on the current apportionment plan. Nor is there evidence of gerrymandering to support some political party or belief.

Lacking any evidence of a bias tending to favor particular political interest or geographic areas, considering the rational basis for the proposed Board member apportionment scheme, and considering the apparent strict compliance with constitutional dictates, it is our opinion that your apportionment plan would likely pass Constitutional muster.

Please feel free to contact me with any questions.

Sincerely,

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



Pietro J. Lynn, Esq.
plynn@lynnlawvt.com

A Unified Vision for Delivering a Quality Education to all Barre Children
Final Report
Barre City and Barre Town Act 46 706b Study Committee

Introduction:

Act 46 is a far reaching piece of legislation designed to encourage school districts to explore the potential benefits of unifying their existing governance structures into a single school board responsible for serving every student in the Barre City and Barre Town communities. It is a bill whose central goal is improving the educational quality of those schools at an affordable and sustainable cost that taxpayers will value.

In the summer of 2015, the school boards of Barre City and Barre Town voted to form an Exploratory Study Committee, representing both districts, to review and assess current patterns of governance within the Supervisory Union given the new requirements of Act 46. To facilitate this study, the committee secured a consultant, Mr. Peter A. Clarke, from the *Act 46 Project*, a joint initiative of the Vermont School Boards Association, Vermont Superintendents Association, and Vermont School Board's Insurance Trust. At the end of the exploratory study, both districts moved ahead with a full 706b merger study to decide whether putting proposed Articles of Agreement for a new unified union district was in the interest of both communities.

Over the past 16 months, the committee met monthly in open session. The consultant visited each school in the district and interviewed members of the S.U.'s administrative team, as well as, members of the school boards of Barre City, Barre Town, and Spaulding High School in order to identify key issues for committee deliberation.

The committee has attempted to maintain a transparent record of its work through the ongoing posting to the S.U.'s website of its meeting schedule, minutes, working documents, and draft findings. Prior to the completion of this report, the committee held public forums and undertook community surveys on a variety of issues related to district unification in order to elicit comment on its findings and used that feedback to revise and strengthen its final report and recommendation. Finally, the Committee submitted its final report to the school boards of Barre City and Barre Town for review and comment.

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

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

Central to the committee's deliberations concerning any potential plan to unify Barre's current Supervisory Union structure into a single unified district governed by a single school board was one central overriding question:

How would unification benefit our children? Specifically, how would a new, unified district governance structure provide better, more equitable instructional opportunities and better support students to achieve or exceed the State's Educational Quality Standards at a cost that parents, voters, and taxpayers value?

During the *Exploratory Phase* of its work, the Study Committee, identified and examined:

- I. The Central Questions Guiding their Study of Unification
- II. The Potential Opportunities and Challenges of Unification - Educational, Cultural, Financial, and Operational
- III. Current Financial and Enrollment Data
- IV. Financial and Tax implications of a merger among the districts that make up the Barre Supervisory Union, including the impact of potential incentives under the law, and the potential loss of hold harmless protections and small schools grants.
- V. The District's Real Property – Assets and Liabilities

Having completed the exploratory stage of its deliberations and having shared this work with community members in a number of public forums, the committee's final report seeks to outline:

- F. An Educational Vision for Unification** that would address the specific goals of Act 46. The committee believes that it is not enough to simply point out the potential opportunities that might attend a unification of existing governance structures but to provide voters with concrete examples of how a unified district might in fact operate, and the opportunity to evaluate specific initiatives that would equitably address the educational needs of students throughout the current supervisory union.
- G. A plan for Maximizing Efficiencies** through Financial Accounting, Budgeting, and Administration.
- H. The Projected Impact on Homestead Tax Rates** due to unification.
- I. A Transition Plan** should the voters approve the proposed plan for district unification.
- J. Specific Articles of Agreement** for consideration by the voters of each sending district as required by law.

Final Note: Neighboring Districts:

During the course of the Barre Supervisory Union’s 706b study, the Committee did not have discussions with any neighboring districts. The reasons for this include:

5. The Barre Supervisory Union is already the largest PreK-12 educational system in central Vermont, and meets the requirements of a preferred structure under Act 46.
6. The long history between Barre City and Barre Town as educational partners including the formation of a supervisory union in 1987 to share the governance of Spaulding Union High School and the Central Vermont Career Center.
7. The fact that both communities are already a part of a single supervisory union with no additional districts.
8. The fact that the union’s closest neighbors were and are already engaged in 706b studies designed to meet the goals of Act 46:
 - a. The Orange and Washington school districts are engaged in a merger study designed to create a single unified district that would be part of a larger side-by-side supervisory union with the Williamstown and Northfield school districts which themselves are engaged in a merger study to create a unified union PreK-12 school district.
 - b. The Cabot, Danville, and Twinfield Union school districts are engaged in a 706b study to explore creating a unified union PreK-12 district as part of a larger side-by-side supervisory union with the tuition districts of Barnet, Walden, and Waterford who are also engaged in exploring the creating of a single unified district for their communities.
 - c. The districts of the Washington Central Supervisory Union are engaged in their own 706b study.
 - d. The fact that the Montpelier School District already meets the requirements of a preferred structure under Act 46 as a stand-alone district.

Given those historical geographic realities, the Committee concluded that there were no potential additional partners available with whom to engage in a dialogue concerning a potential merger.

A. AN EDUCATIONAL VISION FOR UNIFICATION

Guiding Principles:

One of the central challenges of unification is recognizing the important relationship that community members have traditionally had with their local schools in conjunction with the responsibility of providing equitable opportunities for all students. In establishing these guiding principles of educational governance, the Committee is seeking to articulate what they believe to be a set of traditionally shared values that will foster confidence in each sending community concerning the new unified district's educational operations and educational quality.

In its deliberations, the Committee identified the following principles for governing the new district:

- a. Adopt policies that ensure equitable opportunities for all students, efficient use of resources, and flexibility in support of local initiatives and school-based innovation.
- b. Ensure that there will be no reduction in current services and quality for the purpose of achieving educational "equity" across the district.
- c. Offer programs that provide value to the community at a cost that communities are willing to support.
- d. Promote transparent systems of governance that encourage community input, are understandable, and allow for public accountability.
- e. Maintain administrative roles and responsibilities that encourage high educational standards based on State and District policies framed by local aspirations and goals.

Finally, it is assumed/recommended that any new unified board will seek to implement key provisions of the Committee's findings/vision in order to ensure the realization of the following identified educational opportunities for Barre students and in keeping with the expressed expectations of voters.

Educational Priorities:

In its exploratory report the Committee identified the following priorities for achieving educational excellence through unification:

- a. Coordinating and/or streamlining of shared staff (Facilities Directors, Transportation Coordinators, Special Ed and Specialized Services),
- b. Providing better access to interventions and/or enrichments,
- c. Expanding qualified Pre-K,
- d. Coordinating/aligning curriculum within and across grade levels,
- e. Coordinating Special Education services to better address the specific needs of students with the goal of decreasing the number of para professionals and providing better outcomes for students with disabilities.

In addition, the Committee discussed and examined additional educational opportunities that a unified district board might explore further:

1. Providing greater access to improved teaching and teaching styles
2. Sharing teacher expertise and professional development
3. Exploring the creation of magnet programs
4. Creating more equitable opportunities
5. Exploring school choice within the district
6. Providing greater program variety to students (e.g. band, languages)
7. Increasing administrative collaboration
8. Providing more equitable and more efficient access to transportation including a more coherent transportation plan, less pollution, and greater efficiency
9. Engaging students who are not engaged through variety
10. Expanding social boundaries and fostering a stronger sense of community throughout “Barre”
11. Building relationships before high school
12. Fostering a smoother high school transition
13. Expanding opportunity to teach tolerance, acceptance, patience, and creative problem solving
14. Synergistic implementation of Act 153 & 46
15. Unifying and expanding existing sports programs

In examining these priorities, the Administrative Team (Superintendent and key Supervisory Union administrators) noted the progress that the Supervisory Union had already taken in recent years to better coordinate and deliver equitable instructional programs to all students. Examples of this progress include:

- a) Aligned Math, English Language Arts, and Science curriculum across the PreK-8 schools
- b) Utilizing curriculum specialists in Math, Language Arts (and formerly in Science) working across both PreK-8 schools
- c) Utilizing an Early Education Director to coordinate prekindergarten programs across the PreK-8 schools
- d) Common professional development for administrators, teachers, and para-educators across all schools
- e) Merging of Teacher Master Bargaining Agreements into a single agreement so that all teachers in the Supervisory Union operate under the same expectations and working conditions
- f) Merging of Para-Educator Master Bargaining Agreement into a single agreement so that all para-educators in the Supervisory Union operate under the same expectations and working conditions
- g) Employment of all special educators at the SU level in compliance with Act 153
- h) Shared special education staff across schools (Physical Therapists, Occupational Therapists, Student Assistance Professionals, and more)

Building on that work, the Administrative Team identified the following concrete steps, moving forward, as having the greatest potential for realizing the educational benefits of unification, the priorities established by the Study Committee, and the expressed goals of Act 46.

Goal 1: Ensuring Equity, Enhancing Student Learning Opportunities and Academic Performance

- A. Improve opportunities for teacher leadership to support consistency across content areas PreK-12, specifically including the specials (much as the existing curriculum specialists do) through:
 - a. Sharing educational resources across buildings (examples: piano keyboards for musical instruction, Naviance career readiness training between middle schools and high school, microscopes for science labs, and more).
 - b. Improved technology education and equitable access to technology resources such as laptops, tablets, and interactive boards.
 - c. Providing more tools for managing class size by being able to move staff among buildings.
- B. Coordinate individual school schedules at various levels in order to:
 - a. Improve equity
 - b. Enhance opportunities for professional collaboration across schools
 - c. Share staff across schools (e.g., world languages, music education, technology education, special education)
 - d. Improve opportunities for gifted learners, struggling learners, etc.
 - e. Share specialized resources more easily (e.g., Occupational Therapy, Physical Therapy, English Language Learning, alternative educational programs, School Resource Officers, Student Assistance Professionals)
 - f. Differentiate learning opportunities for students including greater exposure to the career center, community service learning and elective courses
- C. Expand options regarding efforts such as universal Pre-K.
- D. Improve communication within and between departments and grade levels (for example, there is a history of curriculum such as world language not being well aligned across buildings).
- E. Promote common expectations (e.g., academic, behavioral) across all schools.
- F. Develop a common report card to measure and communicate student progress
- G. Strengthen the alignment of special education service delivery models (e.g., Uniform use of alternative reading models, de-escalation techniques).
- H. Maintain and/or improve educational equity through eligibility for and distribution of Consolidated Federal Program (Title I and Title IIA) Grants.

Goal 2: Promoting Operational Consistency, Transparency, and Accountability

- 1. Enhance board knowledge of all schools rather than just one. This will afford additional opportunities for PreK-12 strategic thinking and planning including reflection on lessons learned in one school to be applied elsewhere.
- 2. Work to create a unified set of district-wide educational goals and policies aimed at:

- a. The effective coordination of initiatives (e.g. common school improvement plans).
 - b. The alignment of social-emotional curriculum across the district (e.g. PBIS, Development Design, Trauma-Informed Schooling).
 - c. The alignment of student information system usage and data management tools, including training for all teachers to more effectively use individual and aggregate student data to improve instruction.
 - d. A unified program of educator recruitment, induction, and mentoring (including paraprofessionals and substitutes).
 - e. The creation of a unified student handbook reinforcing common standards of behavior and school culture.
 - f. The creation of a unified staff handbook promoting professional standards of conduct and instructional best practice.
3. Develop and foster district-wide planning and accountability systems focused on:
- a. A sustained emphasis on analyzing common data points across all schools, programs, and students.
 - b. A single, agreed upon set of strategic priorities at the board level, the administrative level, and instructional level.
 - c. The promotion of clear and transparent vertical curriculum alignment.
 - d. The needs of all students rather than on specialized interest groups.
 - e. The communication of a clearer, more focused, more integrated picture of the work of Barre's schools.
 - f. Fostering new avenues for community engagement and input led by Board members. (e.g. school-based councils)
4. Restructure current leadership patterns and responsibilities to ensure:
- a. More time for administrators to be instructional leaders by allowing time for administrators to meet with counterparts across and outside the district
 - b. Less time spent preparing for meetings (e.g. improved operational efficiencies would provide more time for central office administrators and building principals to serve in their primary role as instructional leaders)
5. Establish a yearly standardized list of agenda topics for monthly/semimonthly meetings to put a more efficient structure to board meetings. The Board could clearly express its policy-driven and goal-driven desires about what information it wants to review. This process would also foster public engagement through a well-warned exploration of key issues of interest to parents and community members.

Goal 3: Creating a new, unified sense of community identity and culture within the Barre Unified School District

1. Consolidate school websites to promote a common identity and establish improved patterns of communication and outreach.
2. Coordinate community activities across schools so that certain functions could take place in one school but serve families from all schools. (Examples: District music concerts, district art shows, SAP speakers, open houses)
3. Celebrate district-wide examples of educational progress and student achievement.
4. Explore ways to unify or coordinate PTA/parent council activities
5. Foster district-wide opportunities for outreach to community and municipal organizations and leadership groups.
6. Initiate regularly held committee meetings to facilitate community input and monitor the implementation of policy by administration (e.g. school-based councils, community forums, and open houses).
7. Explore creative governance structures that encourage non-voting, community representation and engagement on standing board committees in order to foster greater community input and engagement in the development of board policy.

B. MAXIMIZING EFFICIENCIES

During the course of its exploratory study, the Committee identified the following opportunities for achieving and sustaining financial and operational efficiencies through unification.

I. State Tax Incentives over 4 years; Merger Implementation Grants

II. Large Scale Purchasing/Contract Negotiation with Private Vendors

- a. Technology
- b. Books & supplies
- c. Maintenance needs

III. Shared Administrative, Staffing, and Service Delivery Models

- a. Coordinate teaching/staffing assignments (responding to changing school demographics, program, and building needs)
- b. Eliminate administrative redundancy
- c. Streamline existing service models (transportation, maintenance)
- d. Coordinate financial administration/reduce bureaucracy
 - i. One audit instead of four
 - ii. Fewer board stipends
 - iii. Board services/support (stenographer, legal, dues, etc)
 - iv. Purchasing process
- e. Increase efficiency in state and federal data collection and reporting
- f. Coordinate use of facilities

IV. Further Collaboration of Special Education and Behavioral Management Services

- a. Review of out-of-house vs in-house delivery models and opportunities
- b. Alternative program delivery

V. Asset Coordination

- a. Transportation
- b. Buildings and grounds
- c. Deferred maintenance
- d. Long-term capital planning

An administrative review of these issues revealed that currently:

1. The negotiation of common vendor contracts is currently complex (e.g. food service contracts and copier contracts).
2. Operating at the school level with four separate budgets does not lend itself easily to cost containment (e.g., requirement for four audits, separate and smaller contracts for various things).
3. Operational systems tend to be different from school to school (e.g., purchasing approval).

Finally, an initial audit of current budgets revealed potential annual savings in board related expenditures totaling \$101,979 that would result by unifying the current number of governance structures from four separate boards to one unified district board. It is important to note that these savings are **ongoing** and in addition to other savings that could be achieved by maximizing the operational efficiency of the new district. Furthermore, these savings do not reflect the tax incentives for merging outlined later in this report or the \$150,000 implementation grant in year one.

| Operational Savings due to Board Consolidation Alone (Based on FY'17 Budgets) | |
|--|------------------|
| Board Salaries | \$17,000 |
| FICA/WC | \$614 |
| Stenographer | \$5,800 |
| Treasurer | \$1,600 |
| Contracted Services | \$11,000 |
| Legal | \$5,696 |
| Audit | \$44,354 |
| Print/Adv/Mtg Expenses | \$6,200 |
| Supplies | \$2,600 |
| Dues | \$5,615 |
| Awards | \$1,500 |
| | |
| Total: | \$101,979 |

In summary, the Committee believes that these initial, identified savings in board support alone represent the “tip of the iceberg” of potential savings that could be achieved through implementing the operational efficiencies described earlier in this section. In the financial model to follow an initial savings in operations of \$200,000 was conservatively projected.

C. FINANCIAL/TAX RATE PROJECTIONS

Model Projections:

The financial model utilized in this study is designed to predict trend lines in future homestead tax rates through FY23 for the communities of Barre City and Barre Town under two distinct scenarios: (1) as a merged district; or (2) remaining as three separate districts and a supervisory union (the existing governance structures). The model projects:

- IV. The trend lines in Educational Spending and Local Tax rates for a merged district beginning in FY18 (Merged Scenario), and
- V. The trend lines in Educational Spending and Local Tax rates for these same districts should they remain as they are (No Change Scenario), and,
- VI. The differences in tax rates between a Merged Scenario and a No Change Scenario by computing and comparing the total increases/decreases in tax liabilities through FY23.

Notes:

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

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

The model shows the projected trend lines in homestead tax rates, before they are adjusted by the Common Level of Appraisal (CLA) in each community.

The tax rate you see on your individual tax statement is the homestead tax rate after it is adjusted by each town's common level of appraisal.

Assumptions:

- I. The model assumes that the new unified district would come into existence in FY18.
- J. The Model uses existing financial data from FY16 and FY17 from each individual district involved in this study for determining the baseline for educational spending, equalized pupils, equalized spending per equalized pupil, etc. for the new merged district.
- K. It considers the previous five-year average for determining the change rates for education spending and equalized pupils, though individual districts can adjust these rates at their own discretion should they believe past trends to be an inaccurate predictor of future trends.
- L. The model builds in the tax incentives associated with a Phase II merger over the first four years of the new district's existence. It also takes into account the 5% rate limit on increases or decreases on the homestead property tax rate during that same time frame.

- M. The merged model leaves in place the hold-harmless provision on equalized pupil calculations (e.g. equalized pupil counts do not drop more than 3.5% per year) for every eligible district in the new merged district as well as the continuation of small schools grants to eligible districts.
- N. For the No Change Scenario, hold-harmless and small school grants are adjusted in accordance with the terms of Act 46. (Hold-Harmless FY21 and Small Schools Grants FY20).
- O. The model’s default setting projects the taxes on a **\$200,000 house**. That setting can be changed to project the potential tax impact on properties assessed at different values.
- P. The projected results in the current model assume operational savings due to unification of \$200,000 in the first year of operation and subsequent years. In addition, the education spending rate used in the model for the new district is 2% versus the aggregate growth in educational spending of 2.5%. Finally, the model takes into account the tax incentives over the next four years (8, 6, 4, and 2 cents off the homestead tax rate) built into the law.

Rates of Change:

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

- d) Educational Spending for each town and for the new district as a whole.
- e) Equalized Pupils for each town and for the new district as a whole.
- f) Educational Grand List for each town. (In the current iteration of this model, we left the GL unchanged (0%).

To determine a **starting place** for assessing projected rates of change in Educational Spending and Equalized Pupils, this model uses the previous five-year average change rate in Educational Spending and Equalized Pupil Counts based on the specific data from FY12 and FY17.

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

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

The rates of change applied to this first run of the model were determined as follows:

| Change Rates For Model: | Education Spending Increase | Equalized Pupil Increase | Grand List Increase |
|---|-----------------------------|--------------------------|---------------------|
| Barre City | 3.00% | 0.47% | 0% |
| Barre Town | 2.00% | -0.72% | 0% |
| Spaulding | 2.5% | | |
| Unified Union District | 2.00% | aggregate | 0% |
| ACTUALS | | | |
| 2017 | | | |
| | Ed Spend | Eq. Pup. | Ed Spend/Eq. Pup |
| Barre City | \$10,383,168 | 875.31 | \$11,862 |
| Barre Town | \$9,440,210 | 795.94 | \$11,860 |
| Total Education Spending | \$19,823,378 | 1671.25 | \$11,831 |
| | | | |
| 2012 | | | |
| | Ed Spend | Eq. Pup | Ed Spend/Eq. Pup |
| Barre City | \$8,785,493 | 855.18 | \$10,273 |
| Barre Town | \$8,561,402 | 825.18 | \$10,375 |
| Total Education Spending | \$17,346,895 | 1680.36 | \$10,323 |
| | | | |
| % INCREASES/DECREASES (5 Year Average) | | | |
| | Ed. Spend | Eq. Pup | Ed Spend/Eq. Pup |
| Barre City | 3.30% | 0.47% | 3.09% |
| Barre Town | 1.97% | -0.72% | 2.86% |
| TOTAL | 2.65% | -0.11% | 2.92% |

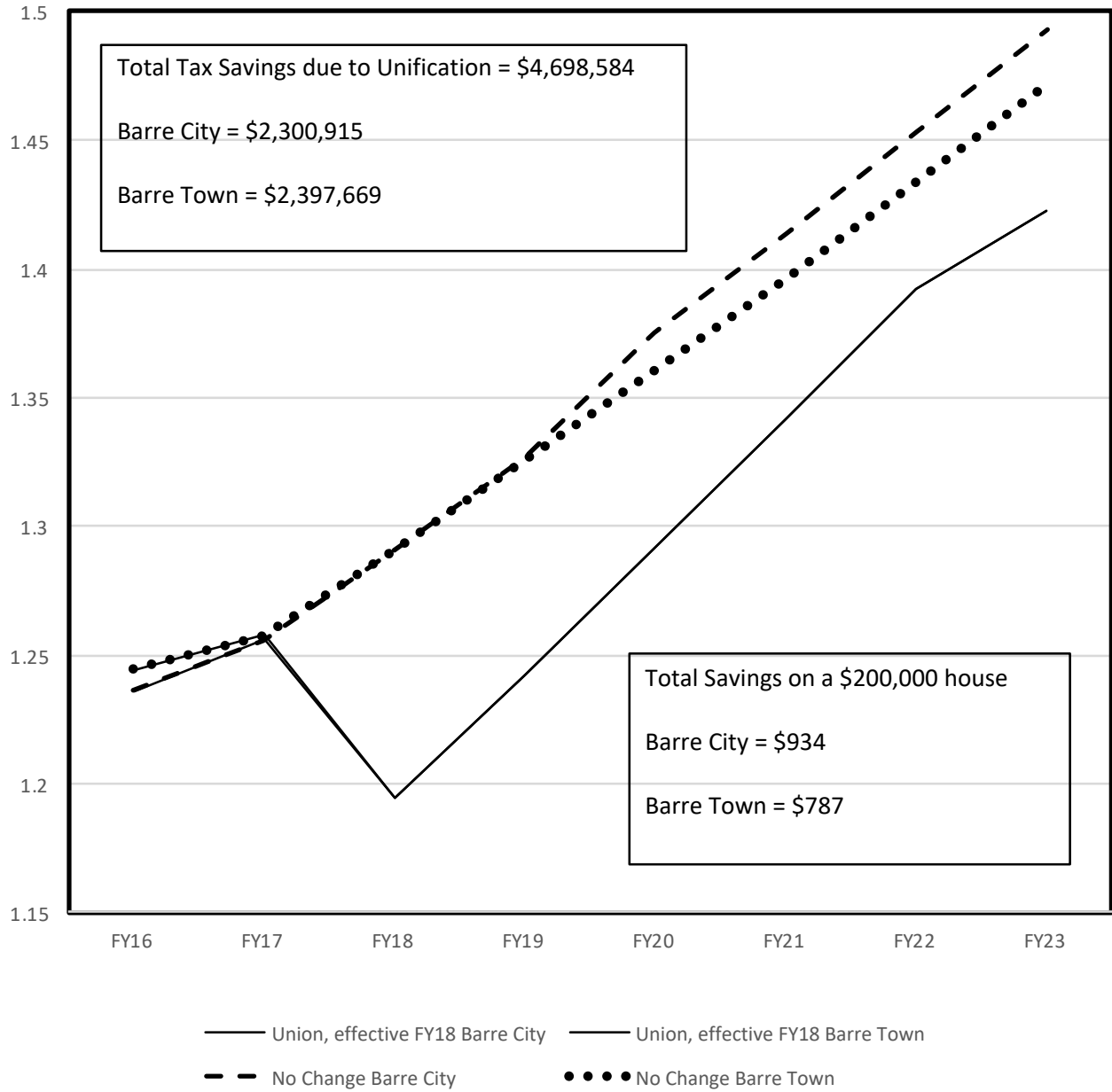
Results:

Equalized Tax Rates – FY-23

| | Unified Union District | No Change |
|-------------------|-------------------------------|------------------|
| Barre City | \$1.4230 | \$1.4933 |
| Barre Town | \$1.4230 | \$1.4720 |

| Unified Union; Model 1 | FY16 | FY17 | FY18 | FY19 | FY20 | FY21 | FY22 | FY23 | Total |
|--------------------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| Barre City | | | | | | | | | |
| Homestead Tax Rate | \$1.2362 | \$1.2559 | \$1.1944 | \$1.2428 | \$1.2919 | \$1.3417 | \$1.3920 | \$1.4230 | |
| Tax \$ (homestead) | \$6,084,400 | \$6,187,928 | \$5,884,947 | \$6,123,420 | \$6,365,341 | \$6,610,712 | \$6,858,545 | \$7,011,286 | |
| Tax savings due to unification | \$0 | \$0 | \$475,037 | \$413,394 | \$411,236 | \$354,462 | \$300,183 | \$346,602 | \$2,300,915 |
| Tax \$ on \$200K home | \$2,472 | \$2,512 | \$2,389 | \$2,486 | \$2,584 | \$2,683 | \$2,784 | \$2,846 | |
| Tax savings on \$200K home | \$0 | \$0 | \$193 | \$168 | \$167 | \$144 | \$122 | \$141 | \$934 |
| Barre Town | | | | | | | | | |
| Homestead Tax Rate | \$1.2442 | \$1.2577 | \$1.1948 | \$1.2428 | \$1.2919 | \$1.3417 | \$1.3920 | \$1.4230 | |
| Tax \$ (homestead) | \$7,532,544 | \$7,665,144 | \$7,281,916 | \$7,574,461 | \$7,873,709 | \$8,177,224 | \$8,483,786 | \$8,672,721 | |
| Tax savings due to unification | \$0 | \$0 | \$586,795 | \$503,304 | \$418,802 | \$335,518 | \$254,879 | \$298,371 | \$2,397,669 |
| Tax \$ on \$200K home | \$2,488 | \$2,515 | \$2,390 | \$2,486 | \$2,584 | \$2,683 | \$2,784 | \$2,846 | |
| Tax savings on \$200K home | \$0 | \$0 | \$193 | \$165 | \$137 | \$110 | \$84 | \$98 | \$787 |
| Unified District Totals | | | | | | | | | |
| Tax \$ Raised in Town | \$13,616,944 | \$13,853,072 | \$13,166,864 | \$13,697,881 | \$14,239,051 | \$14,787,936 | \$15,342,332 | \$15,684,007 | \$114,388,086 |
| Tax savings due to unification | \$0 | \$0 | \$1,061,832 | \$916,699 | \$830,038 | \$689,980 | \$555,062 | \$644,973 | \$4,698,584 |
| No Change | | | | | | | | | |
| Barre City | | | | | | | | | |
| Homestead Tax Rate | \$1.2362 | \$1.2559 | \$1.2908 | \$1.3267 | \$1.3754 | \$1.4136 | \$1.4529 | \$1.4933 | |
| Tax \$ (homestead) | \$6,084,400 | \$6,187,928 | \$6,359,985 | \$6,536,814 | \$6,776,577 | \$6,965,173 | \$7,158,728 | \$7,357,888 | |
| Tax savings due to unification | | | | | | | | | |
| Tax \$ on \$200K home | \$2,472 | \$2,512 | \$2,582 | \$2,653 | \$2,751 | \$2,827 | \$2,906 | \$2,987 | |
| Barre Town | | | | | | | | | |
| Homestead Tax Rate | \$1.2442 | \$1.2577 | \$1.2911 | \$1.3254 | \$1.3606 | \$1.3968 | \$1.4338 | \$1.4720 | |
| Tax \$ (homestead) | \$7,532,544 | \$7,665,144 | \$7,868,712 | \$8,077,765 | \$8,292,511 | \$8,512,742 | \$8,738,665 | \$8,971,092 | |
| Tax savings due to unification | | | | | | | | | |
| Tax \$ on \$200K home | \$2,488 | \$2,515 | \$2,582 | \$2,651 | \$2,721 | \$2,794 | \$2,868 | \$2,944 | |

Projections in Homestead Tax Rates FY'16-FY'23 Barre City, Barre Town, Unified Union District



Summary Observations:

In reviewing the data from the financial model, the Committee noted that:

- P. The numbers (equalized pupil counts, educational spending, yield figures, etc.) used in the model are not set in stone and a lot can happen with them. **The model was designed to predict trend lines not future tax rates.**
- Q. Becoming a unified district would result in tax incentives (8, 6, 4, and 2 cents over four years off the homestead tax rate).
- R. All education spending and all equalized pupils throughout the Supervisory Union are combined to arrive at a unified homestead tax rate.
- S. The difference between the two trend lines (“no change” vs. merger) represent the tax savings in the homestead tax rate.
- T. The property yield is the amount a district would be spending per pupil if its homestead tax rate was \$1.00. This year, the yield is \$9,701. The model is not designed to account for future variations in the yield so it is constant at \$9,701 throughout the modeling years. Using a constant value potentially creates a conservative estimate in future tax savings.
- U. Local tax rates will be different depending on the Common Level of Appraisal (CLA) in each community. The model is set for no change in the CLA over the next five years.
- V. The current grand list information was used for each town. If the list changes the numbers will change. The model uses the same grand list throughout.
- W. Changes in equalized pupils and gross education spending affect the tax rate. In terms of equalized pupils, over the last five years, Barre City has *grown* by .47% per year, while Barre Town has seen a *decline* in its student population of .72% per year – a net difference of more than 1%. As a result, over the past five year’s gross education spending in Barre City has averaged a 3.40% increase per year to meet the needs of a larger school population, while Barre Town has averaged an increase of 1.97% per year.
- X. However, in terms of Education Spending per Equalized Pupil, the key figure that determines each district’s homestead tax rate, the average rate of change has been nearly identical in both communities (3.09% in Barre City vs. 2.86% in Barre Town) over the past five years. In addition, in FY’17 the Education Spending per Equalized Pupil for both districts is, itself, almost identical {in FY’17 the Barre City value is \$11,805 and the Barre Town value is \$11,860} among the lowest spending ratios in Vermont. In FY’17 the state average in Education Spending per Equalized Pupil is \$14,652, as reported from the Vermont Agency of Education. These figures illustrate the high level of fiscal responsibility exhibited by both Barre City and Barre Town. At Spaulding the FY’17 cost per pupil is \$12,891, also among the lowest in the state.

- Y. The education spending rate used in the model for the new district is 2% versus the aggregate growth in educational spending of 2.5%. Over the next six years, this modest savings in the growth of educational spending of about ½ of one percent could generate savings of 1.4 million dollars for the new unified district. FY2018 is the assumed date that the new district comes into existence. \$12,362 is the estimated per pupil education spending in year one.
- Z. The law says a town's homestead tax rate can only go up or down from the previous year's homestead rate, prior to adjustment by the CLA, until the town's homestead rate meets the unified rate. In the model, neither Barre City nor Barre Town get the full benefit of the 8 cent drop in the homestead tax rate because it is larger than 5%. Moving forward, each district gets the full benefit of the tax incentives.
- AA. By FY2023, all the incentives are gone, and the homestead tax rate in the new unified district is the same for both communities.
- BB. If nothing changes, the homestead tax rate for Barre City is *projected* over the next six years to go from 1.2559 to 1.4933; Barre Town, from 1.2577 to 1.4720 compared to a unified tax rate for both districts in FY'23 of 1.4230, a difference of approximately 7 cents in Barre City and 5 cents in Barre Town.
- CC. This translates into a *projected* total tax savings for both districts, of approximately \$4,698,584:
- \$1.7 million due to a reduction in spending of \$200,000 in year one due to board consolidation, and the projected operational efficiencies that accrue due to curbing the growth in education spending in the new unified union by 0.5% per year over the next 6 years, and
 - \$2.8 million due to state incentives.
- DD. For Barre City the projected total tax savings is \$2,300,915; for Barre Town the total is \$2,397,669. In terms of a \$200,000 house, the *projected* savings over six years in Barre City is \$934; in Barre Town it is \$787.

Final Note: It is worth repeating that the model used to forecast these results was created for purposes of comparative illustrations, and under no circumstances should be relied upon to forecast future actual tax rates resulting if and when a merger occurs or does not occur. It is also worth noting, that actual operational savings due to unification could be reinvested by the new unified union board to improve the level of educational opportunity in Barre without having to raise additional resources, changing the actual tax savings projected over the next six years.

D. TRANSITION PLANNING

Upon an affirmative vote of the electorate in both Barre City and Barre Town on November 8, 2016 and certification of the final vote of each district by the Vermont Secretary of Education to the Vermont Secretary of State per 16 VSA § 706g, the new Barre Unified Union School District would come into existence and have all of the authority necessary for it to prepare for full educational operations beginning on July 1, 2017.

The Barre Unified Union School District would, between the date of its first organizational meeting under 16 VSA – 706j and June 30, 2017, undertake all of the planning and related duties necessary to begin operations of the new unified union school district on July 1, 2017, including:

- e. Preparing for and negotiating contractual agreements;
- f. Preparing and presenting a budget to the voters for fiscal year 2018;
- g. Preparing for the Barre Unified Union School District annual meeting, March 7, 2017;
- h. Transacting any other lawful business that comes before the Board.

The authority exercised by the new Barre Unified Union School District shall not limit or alter the ongoing authority and/or responsibilities of the school boards that make up the current Supervisory Union which will remain in existence during the transition period for the purpose of completing any and all business not given under law to the new unified union district board. In essence, each individual district board would maintain its current authority until the new district becomes operational on July 1, 2017. The existing districts and supervisory union will remain in operation after July 1, 2017 only to conclude any business.

In summary, an affirmative vote of the electorate in both Barre City and Barre Town would also result in, but not be limited to, the following:

- g. Employees throughout the current Supervisory Union offered continuing employment following the 2016-2017 school year, consistent with all legal requirements, would become employees of the new Barre Unified Union School District.
- h. All assets of the pre-existing districts would be transferred to the new unified union district for the sum of \$1.00 as of July 1, 2017.
- i. Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the new unified union district as of July 1, 2017.
- j. Following the certification of the election results by the Agency of Education to the Secretary of State (30-45 days after the vote), an organizational meeting of the new unified district would be convened by the Secretary of the Agency of Education or designee in accordance with Title 16, 706j.
- k. The newly elected members of the Barre Unified Union School District, consistent with statute, would begin the work of preparing for the district's first day of operations - hiring a superintendent, defining administrative and operational roles and responsibilities, establishing

policy, negotiating contracts, developing budgets, and establishing new structures for community engagement.

1. Through June 30, 2017, the four pre-existing boards of the supervisory union would continue to govern their respective districts and/or schools. The existing districts and supervisory union will remain in operation after July 1, 2017 only to conclude any business.

E. ARTICLES OF AGREEMENT

Articles of Agreement Barre Unified Union District

The Barre Supervisory Union Act 46 Study Committee recommends the following Articles of Agreement for the creation of a Pre-Kindergarten through grade 12 unified union school district, to be named the Barre Unified Union School District. The forming districts are the Barre City School District, Barre Town School District, and the Spaulding Union High School District. As Barre City and Barre Town are the only members of the Spaulding Union High School District, an affirmative vote in both town districts shall bring it into the merged district.

Article 1: Necessary Forming School Districts

The School Districts of Barre City, Barre Town, and the Spaulding Union High School District are necessary for the establishment of the Barre Unified Union School District. The above referenced school districts are hereinafter referred to as the “forming districts”.

Article 2: Additional Districts

No additional districts are included in the proposed Barre Unified Union School District at this time.

Article 3: Grades to Operate

The Barre Unified Union School District will operate grades Pre-Kindergarten through grade 12, including the Central Vermont Career Center.

Article 4: Proposed New School Construction

No new schools are proposed to be constructed at this time.

Article 5: Plan for First Year of Operation

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

The board will comply with the 16 VSA Chapter 53, subchapter 3, regarding recognition of the representatives of employees of the respective forming districts as the representatives of the employees

of the union school district and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees. In the absence of new collective bargaining agreements on July 1, 2017, the Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, subchapter 3. The Board shall assume all individual employment contracts that are in place in the forming districts on June 30, 2017 until their termination dates.

Article 6: Indebtedness of Member Districts

D. Capital Debt

The Barre Unified Union District shall assume all capital debt of the forming districts as may exist on June 30, 2017, including both principal and interest, of the forming school districts that joined the new union district.

E. Operating Fund Surpluses, Deficits and Reserve Funds

The Barre Unified Union District shall assume any and all operating deficits, surpluses, and fund balances of the forming districts that may exist on the close of business on June 30, 2017. In addition, reserve funds identified for specific purposes will be transferred to the Barre Unified Union District, and will be applied for lawful district purposes unless otherwise designated through lawful conditions of use.

F. Restricted Funds:

The Barre Supervisory Union and the forming school districts will transfer to the Barre Unified Union District any preexisting specific endowments or other restricted accounts, including student activity and related accounts, held by school districts that may exist on June 30, 2017. Scholarship accounts or similar accounts, held by school districts prior to June 30, 2017, that have lawful specified conditions of use will be used in accordance with said provisions.

Article 7: Real and Personal Property

B. Transfer of Property to the Unified District:

No later than June 30, 2017, the forming districts will convey to the Barre Unified Union District, for the sum of one dollar, and subject to the encumbrances of record, all of their real and personal property, including all land, buildings, and content.

B. Subsequent Sale of Real Property to Towns:

In the event that, and at such subsequent time as, the Barre Unified Union Board of Directors determines, in its discretion, that continued possession of the real property, including land and buildings, conveyed to it by one or more of the necessary forming districts will not be used in direct delivery of student educational programs, the Barre Unified Union School District shall offer for sale such real property to the town/city in which such real property is located, for the sum of one dollar, subject to all encumbrances of record, the assumption or payment of all outstanding bonds and notes, and the repayment of any school construction aid or grants required by Vermont law, in addition to costs of capital improvements subsequent to July 1, 2017. Article 13 of these Articles of Agreement addresses the conditions under which a building may be closed.

The conveyance of any of the above school properties shall be conditioned upon the town owning and using the real property for community and public purposes for minimum of five years after conveyance to the municipality. In the event the town elects to sell the real property prior to five years of ownership, the town/city shall compensate the Unified District for all capital improvements and renovations completed after the formation of the Unified District prior to the sale to the town. In the event a municipality elects not to acquire ownership of such real property, the Unified District shall, pursuant to Vermont law, sell the property upon such terms and conditions as established by the Barre Unified Union School District Board of School Directors.

Article 8: Board of School Directors Representation

The Board of School Directors shall have nine (9) members, with four (4) residing in and representing Barre City; four (4) residing in and representing Barre Town; and one (1) elected at-large by the voters of both municipalities. The Barre Town and Barre City specific numbers of directors are consistent with current census figures. Each time there is a new decennial census, the proportionality of the Barre Town and Barre City specific numbers of directors shall be aligned to the new counts if necessary.

The Board member elected at-large shall be subject to voting by the electorate in both forming districts, with the candidate receiving the highest vote total prevailing. The eight Board members representing a specific municipality shall be subject to voting only in their municipality of residence, with the candidate(s) receiving highest vote totals prevailing.

Article 9: Initial Directors Terms of Office

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

| Town | Term ending March 2018 | Term ending March 2019 | Term ending March 2020 |
|-------------|-----------------------------------|-----------------------------------|-----------------------------------|
| Barre City | 1 | 2 | 1 |
| Barre Town | 2 | 1 | 1 |
| At- Large | 0 | 0 | 1 |

The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting.

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

Nominations for the office of the at-large School Director shall be made by filing a statement of nomination signed by at least 60 voters from one or more of the forming districts with the clerk of any district/town proposed as a necessary member of the Unified District. A statement shall be filed not fewer than 30, nor more than 40 days prior to the date of the vote.

Pursuant to the provisions of 16 V.S.A. – 706j(b), directors initially elected to the new district shall be sworn in and assume the duties of their office.

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

Article 10: Submission to Voters

The proposal forming the Barre Unified Union School District will be duly warned and presented to the voters of each town school district on November 8, 2016. The vote shall take place in each of the school districts by Australian ballot.

Article 11: Commencement of Operations

Upon an affirmative vote of the electorates of the forming districts and upon compliance with 16 VSA – 706g, the Barre Unified Union School District shall have and exercise all of the authority which is necessary in for it to prepare for full educational operations beginning on July 1, 2017. The Barre Unified Union School District shall, between the date of its organizational meeting under 16 VSA – 706j and June 30, 2017, undertake planning and related duties necessary to begin operations of the new unified union school district on July 1, 2017, including preparing for and negotiating contractual

agreements, preparing and presenting the budget for fiscal year 2018, preparing for the Barre Unified Union School District annual meeting and transacting any other lawful business that comes before the Board, provided however, that the exercise of such authority by the Barre Unified Union School District shall not be construed to limit or alter the authority and/or responsibilities of the school districts that will form the new unified union school district and that will remain in existence during the transition period for the purpose of completing any business not given to the Barre Unified Union School District.

On July 1, 2017, when the Unified District becomes fully operational and begins to provide educational services to students, the school districts of the forming towns shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the Unified District under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2017. Upon the completion of outstanding business or December 31, 2017, whichever date is earlier, the forming school districts shall cease to exist pursuant to 16 VSA §722. The Barre Supervisory Union shall cease all operations within a reasonable timeframe of the completion of all outstanding business of its member school districts, but in no event any later than January 31, 2018.

Article 12: Australian Ballot Voting

The Barre Unified Union School District shall vote the annual school district budget and public questions by Australian ballot. In the Australian ballot voting, the ballots shall not be commingled between Barre City and Barre Town, with each merging district's votes to be counted separately before a determination of total combined votes.

Article 13: School Restructuring and Closing

Any proposal by the district's new unified board of directors to restructure the district's current elementary school configuration into one elementary and one middle school may not be considered for 5 years. Additionally, per Act 153, Section 3(d) no school may be closed during the first four years of operation of a new Regional Educational District without the approval of the electorate of the town in which it is located.

Article 14: Redistricting/Choice

For the first five years of the operation of the Barre Unified Union School District, students in elementary schools (Prek-8) will attend school in their current town of residency; provided however with parental consent, the Board may adjust student enrollment based upon individual circumstances and the needs of the Unified District. After the first five years the board will have the authority to adjust school attendance boundary lines with a 2/3rds (supermajority) vote of the Board.

Students and their families may voluntarily request assignment at another elementary school (Prek-8) according to policies on intra-district choice established by the Board.

Article 15: Local Input

The new unified board shall ensure ongoing opportunities for local input on policy and budget development. Structures to support and encourage public participation within the Barre Unified Union School District will be established by the Board on or before June 30, 2017.

APPENDICES

Appendix 1: Essential Questions answered by Supervisory Union Admin Team

To what extent do existing governance structures limit effective patterns of preK-12 planning, administration, accountability, and cost containment?

1. It is difficult for individual boards to be fully aware of what's happening in other schools due to isolation or misinformation.
2. There can be a sense of negative competition across boards.
3. Negotiation of common contracts is currently complex and messy (for instance, the food service contract).
4. Operation at the school level does not lend itself to cost containment (e.g., requirement for four audits, separate and smaller contracts for various things).
5. Individual boards are always free to chart new directions that could disrupt unity.
6. Any initiative requires negotiation with different boards.
7. Systems tend to be different from school to school (e.g., purchasing approval).
8. Moving common decisions through multiple boards is difficult to do efficiently, collaboratively and effectively.
9. Current structure of SU board and district boards is not always as effective as it could be. Roles and responsibilities are not always clear, and decisions by other boards are not always well received.
10. Student and staff issues that come to the board are handled inconsistently at times.
11. Local boards are more inclined to have different mindsets from one to another and over time.
12. Time that building and SU administrators spend preparing for, participating in and responding to individual board meetings is time that is not spent on instructional leadership.

What would it take for multiple boards to think and act with a district-wide focus?

1. Carousel board meetings (which have proven tough to implement).
2. Legal/statutory framework to support common work (to prevent boards from having individual agendas).
3. Excellent communication between current boards.

How will the interests of stakeholders in each community - students, parents, community members, and taxpayers - be protected and or enhanced in a unified district? (e.g. representation, parent councils, etc.)

1. Availability of the board's attention to individual stakeholder groups could be addressed through board member participation in building-based parent and community councils, forums, open houses, etc. Should be approached systematically to ensure participation as needed.
2. Having one board allows us to have district-wide initiatives that are currently difficult to coordinate across boards.
3. A unified board would be familiar with efforts successful and unsuccessful in all schools and be able to use that knowledge to enhance the learning experiences of all children.
4. Board representation should be structured to ensure the voices of both communities are heard.

5. A unified board is responsible for meeting the needs of all children, with “all children” meaning every child in each community.
6. Pooling resources could create more opportunities for students (for instance, by enabling specialized programs).
7. Taxpayers’ interests are served by many of the advantages cited elsewhere.
8. The potential for intra-district school choice (in some limited circumstances) could benefit students’ needs.

How would current instructional practice, educational opportunities, and local traditions be protected in any restructuring of district governance?

1. Language in the merger proposal should express the importance of local innovation and sharing of best practice – concept of laboratory schools.
2. Conversely, do we necessarily *want* to preserve all existing instructional practices, opportunities, etc.? Merger could lead to more timely review of existing practices for effectiveness. We want to preserve what makes sense to preserve, but collaboration will help us be more clear about what *should* be preserved.
3. Document existing traditions at each school as a starting point for discussion.
4. Administrators could recommend to the unified board those structures and practices that should be common across buildings.

How would a unified board be fully responsive to the interests and needs of each school in the district?

1. It would be administration’s job to communicate on behalf of each school, in part by means of a standard structure for building administrator reports.
2. The Board could invite student and staff presentations at each meeting, perhaps in rotation across buildings.
3. A unified board should establish a defined structure for board retreats that focuses on goal-setting and mission, less on routine business.
4. A unified board should maintain a manageable and intentional level of building level administrative presence at regular board meetings.

How might a unified board really understand and respond to the needs of schools within the district?

1. It would be administrators’ job to help the board to use school and district performance data to make decisions in order to approach their work more efficiently.
2. A unified board could establish school-community councils (administrative representation, one/two board members and others such as staff and students) to ensure regular and thoughtful community input.

Appendix 2: District Real Property - Assets and Liabilities

Barre Supervisory Union

Summary of Buildings, Contents and Site Values, Long Term Debt, and Reserve Funds

| Fund Balances (unaudited) as of 6/30/16. | Total Insurance Value of Buildings, Contents and Site Improvements | Less Total Long Term Debt/Lease | Buildings, Content and Site Improvements Less Long Term Debt and Capital Leases | FY17 Equalized Pupils | Capital Asset Value Less Long Term Debt Per Equalized Pupil |
|---|--|--|---|---|--|
| | Barre Supervisory Union | \$1,319,600.00 | \$0.00 | \$1,319,600.00 | 0 |
| Barre City | \$20,547,600.00 | \$609,182.00 | \$19,938,418.00 | 875.31 | \$22,778.69 |
| Barre Town | \$25,651,200.00 | \$95,000.00 | \$25,556,200.00 | 795.94 | \$32,108.20 |
| Spaulding Union High School | \$42,484,300.00 | \$3,085,039.00 | \$39,399,261.00 | 788.96 | \$49,938.22 |
| Total All Member Districts | \$90,002,700.00 | \$3,789,221.00 | \$86,213,479.00 | 2460.21 | \$35,043.14 |
| Fund Balances (unaudited) as of 6/30/16. | Current General Fund Balance (unaudited) | Current Tax Stabilization Balance (unaudited) | Current Maintenance Reserve Fund Balance (unaudited) | Current Value of all Funds (unaudited) | Capital Asset Value Less Long Term Debt Per EP Including Maint. Reserve |
| Barre Supervisory Union | \$192,421.00 | \$0.00 | \$0.00 | \$0.00 | \$0.00 |
| Barre City | \$0.00 | \$317,000.00 | \$159,000.00 | \$476,000.00 | \$23,322.50 |
| Barre Town | \$445,000.00 | \$35,700.00 | \$320,000.00 | \$800,700.00 | \$33,114.18 |
| Spaulding Union High School | \$230,000.00 | \$120,000.00 | \$152,038.00 | \$502,038.00 | \$50,574.55 |
| Total All Member Districts | \$867,421.00 | \$472,700.00 | \$631,038.00 | \$1,778,738.00 | \$88,184,638.00 |
| FUTURE CONSIDERATIONS | | | | | |
| BTMES Buses | Estimated in May 2016 to have a Blue Book value of \$330,000 | | | | |
| BTMES Athletic Fields | If athletic fields are transferred to Town of Barre total insurance value listed above will decrease | | | | |

**Appendix 3A: Comparison of 2015 Smarter Balanced Assessment Data
Aggregated and Dis-Aggregated for Free & Reduced Lunch
Barre Town School vs. Barre City School**

| School | Grade | All % Proficient | | FRL # Students | FRL % Proficient | NFRL # Students | NFRL % Proficient |
|-------------------|-------|------------------|--|----------------|------------------|-----------------|-------------------|
| Barre Town | | | | | | | |
| ELA | 3 | 60 | | 26 | 42 | 49 | 69 |
| | 4 | 53 | | 21 | 48 | 58 | 55 |
| | 5 | 55 | | 25 | 40 | 64 | 61 |
| | 6 | 61 | | 31 | 38 | 58 | 55 |
| | 7 | 56 | | 20 | 30 | 69 | 64 |
| | 8 | 69 | | 23 | 70 | 61 | 68 |
| Totals/Ave | | ~59% | | 146 | ~45 % | 359 | ~62% |
| Math | | | | | | | |
| | 3 | 61 | | 26 | 46 | 49 | 69 |
| | 4 | 56 | | 21 | 52 | 58 | 57 |
| | 5 | 43 | | 25 | 24 | 64 | 50 |
| | 6 | 36 | | 31 | 16 | 58 | 47 |
| | 7 | 44 | | 20 | 30 | 69 | 48 |
| | 8 | 56 | | 23 | 35 | 61 | 64 |
| Totals/Ave | | ~49% | | 146 | ~34% | 359 | ~55% |
| Barre City | | | | | | | |
| ELA | 3 | 31 | | 59 | 32 | 20 | 30 |
| | 4 | 51 | | 59 | 41 | 31 | 71 |
| | 5 | 43 | | 53 | 32 | 19 | 74 |
| | 6 | 38 | | 52 | 23 | 35 | 60 |
| | 7 | 49 | | 46 | 30 | 25 | 72 |
| | 8 | 54 | | 44 | 35 | 27 | 74 |
| Totals/Ave | | ~44% | | 313 | ~32% | 157 | ~64% |
| Math | | | | | | | |
| | 3 | 37 | | 59 | 32 | 20 | 50 |
| | 4 | 42 | | 59 | 39 | 31 | 48 |
| | 5 | 34 | | 53 | 25 | 19 | 58 |
| | 6 | 31 | | 52 | 21 | 35 | 46 |
| | 7 | 43 | | 46 | 36 | 25 | 56 |
| | 8 | 44 | | 44 | 33 | 27 | 63 |
| Totals/Ave | | ~39% | | 313 | ~31% | 157 | ~54% |

**Appendix 3B: Comparison of 2016 Smarter Balanced Assessment Data
Aggregated and Dis-Aggregated for Free & Reduced Lunch
Barre Town School vs. Barre City School**

| School | Grade | All % Proficient | | FRL # Students | FRL % Proficient | NFRL # Students | NFRL % Proficient |
|-------------------|-------|------------------|--|----------------|------------------|-----------------|-------------------|
| Barre Town | | | | | | | |
| ELA | 3 | 56 | | 17 | 53 | 63 | 57 |
| | 4 | 70 | | 23 | 61 | 51 | 75 |
| | 5 | 68 | | 19 | 63 | 56 | 69 |
| | 6 | 61 | | 21 | 38 | 65 | 69 |
| | 7 | 57 | | 24 | 38 | 73 | 63 |
| | 8 | 78 | | 19 | 68 | 69 | 81 |
| Totals/Ave | | ~65% | | 123 | ~54% | 377 | ~69% |
| Math | | | | | | | |
| | 3 | 66 | | 17 | 59 | 63 | 68 |
| | 4 | 66 | | 23 | 57 | 51 | 71 |
| | 5 | 35 | | 19 | 32 | 56 | 35 |
| | 6 | 34 | | 21 | 10 | 55 | 42 |
| | 7 | 46 | | 24 | 25 | 65 | 53 |
| | 8 | 64 | | 19 | 37 | 69 | 71 |
| Totals/Ave | | ~52% | | 123 | ~37% | 377 | ~57% |
| Barre City | | | | | | | |
| ELA | 3 | 51 | | 61 | 46 | 37 | 59 |
| | 4 | 35 | | 48 | 17 | 30 | 63 |
| | 5 | 40 | | 51 | 24 | 38 | 63 |
| | 6 | 43 | | 47 | 32 | 25 | 64 |
| | 7 | 49 | | 43 | 26 | 41 | 73 |
| | 8 | 50 | | 44 | 34 | 28 | 75 |
| Totals/Ave | | ~45% | | 294 | ~30% | 199 | ~66% |
| Math | | | | | | | |
| | 3 | 60 | | 60 | 52 | 37 | 73 |
| | 4 | 47 | | 48 | 38 | 30 | 63 |
| | 5 | 28 | | 50 | 16 | 38 | 45 |
| | 6 | 38 | | 47 | 28 | 25 | 56 |
| | 7 | 42 | | 42 | 36 | 41 | 59 |
| | 8 | 43 | | 45 | 33 | 28 | 57 |
| Totals/Ave | | ~43% | | 292 | ~34% | 199 | ~59% |

Appendix 4: SUMMARY FINANCIAL AND ENROLLMENT DATA
Barre Supervisory Union - School District Data

| | Spaulding High School | Barre City School | Barre Town School | Vermont |
|---|-----------------------|-------------------|-------------------|-----------|
| Grades Served | 9-12 | PreK-8 | PreK-8 | PreK-12 |
| FY'16 ADM | 664.41 | 878.34 | 838.45 | |
| FY'16 Educational Spending per Equalized Pupil (ES/EP) | 12,474.12 | 11,495.58 | 11,594.65 | 14,008.54 |
| FY'16 Student-to-Teacher Ratio | 10.36 | 8.73 | 11.3 | 10.45 |
| FY'16 Student-to-Adult Ratio | n/a | n/a | n/a | n/a |
| FY'16 Teacher-to-Administrator Ratio | 4.58 | 33.58 | 24.6 | 9.4 |
| FY'16 Student-to-Administrator Ratio | 47.43 | 294 | 268 | 98.26 |
| FY'16 Ave. Teacher Salary (\$49,033 for S.U.) | \$52,114 | \$49,096 | \$51,888 | \$57,063 |
| | | | | |
| FY'15 ADM | 725.02 | 890.44 | 848.44 | |
| FY'15 Educational Spending per Equalized Pupil (ES/EP) | 12,448.12 | 11,361.68 | 11,093.98 | 14,008.54 |
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| FY'15 Student-to-Adult Ratio | n/a | n/a | n/a | n/a |
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| FY'14 Student-to-Administrator Ratio | 66.55 | 300.7 | 285.3 | 105 |
| FY'14 Ave. Teacher Salary (\$49,635 for S.U.) | \$48,326 | \$46,377 | \$55,531 | \$55,903 |
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| FY'13 ADM | 731.30 | 914.16 | 861.50 | 83,139.20 |
| FY'13 Educational Spending per Equalized Pupil (ES/EP) | 11,580.03 | 10,959.55 | 10,610.68 | 12,788.90 |
| FY'13 Student-to-Teacher Ratio | 7.6 | 10.2 | 10.9 | 10.7 |
| FY'13 Student-to-Adult Ratio | 5.1 | 5.7 | 6.9 | 5.5 |
| FY'13 Teacher-to-Administrator Ratio | 26.67 | 45.3 | 26 | 9.7 |
| FY'13 Student-to-Administrator Ratio | 202.5 | 465 | 285 | 103 |
| FY'13 Ave. Teacher Salary (\$44,415 for S.U.) | \$40,761 | \$46,327 | \$47,973 | \$54,420 |
| | | | | |
| NOTE: The source of this table is the School Report data from the Vermont Agency of Education | | | | |

Appendix 5: Enrollment Data for Barre Supervisory Union Schools

| <u>Grade</u> | Barre Town School | Barre City School | Spaulding HS |
|----------------|--------------------------|--------------------------|---------------------|
| PreK | 117 | 111 | |
| K | 82 | 112 | |
| 1 | 66 | 118 | |
| 2 | 103 | 95 | |
| 3 | 81 | 90 | |
| 4 | 85 | 99 | |
| 5 | 86 | 82 | |
| 6 | 79 | 89 | |
| 7 | 89 | 77 | |
| 8 | 100 | 90 | |
| 9 | | | 195 |
| 10 | | | 167 |
| 11 | | | 180 |
| 12 | | | 197 |
| Post-12 | | | 9 |

**Appendix 6: Curriculum Comparison between
Barre City School and Barre Town School**

| Grade Span | Curriculum |
|-------------------|---|
| PreK | <ul style="list-style-type: none"> • Common Curriculum and Assessment • Both programs supervised and coordinated by BSU Early Education Director • Both programs are pilot programs for Early MTSS |
| K to 4 | <ul style="list-style-type: none"> • Common Math Curriculum (coordinated by Math Curriculum Specialist) • Common Language Arts Curriculum (coordinated by Literacy Curriculum Specialists) <ul style="list-style-type: none"> • Common Science Curriculum • Common Social Studies Curriculum • Common PBIS & Responsive Classroom <p align="center"><u>“Separate” Specials Curriculum*</u></p> <ul style="list-style-type: none"> • Art • Music/Band • P.E. • Health/Counseling |
| 5 to 8 | <ul style="list-style-type: none"> • Common Math Curriculum (coordinated by Math Curriculum Specialist) • Common Language Arts Curriculum (coordinated by Literacy Curriculum Specialists) <ul style="list-style-type: none"> • Common Science Curriculum • Common Social Studies Curriculum <p align="center"><u>“Separate” Specials Curriculum*</u></p> <ul style="list-style-type: none"> • Art • Music/Band • P.E. • Family & Consumer Science <ul style="list-style-type: none"> • Technology Education • Spanish • Social Curriculum |

* Teachers collaborate but do not follow identical curriculum and units of study

Appendix 7: Community Outreach

- IV. Act 46 Committee Meetings (all warned and open to the public):**
- September 29, 2015
 - October 28, 2015
 - November 19, 2015
 - December 3, 2015
 - January 21, 2016
 - February 18, 2016
 - March 17, 2016
 - April 28, 2016
 - June 16, 2016
 - July 14, 2016
 - August 11, 2016
 - September 8, 2016
 - September 22, 2016
 - October 6, 2016
- V. Public Forums**
- January 12, 2016
 - May 19, 2016
 - October 20, 2016 (planned)
- VI. Public Surveys**
- May & June 2016
 - August & September 2016
- VII. Presentations**
- August 17, 2016 - Barre Rotary
 - September 2, 2016 – Open Mike on WDEV
 - September 6, 2016 – Barre Lions
 - September 13, 2016 – Barre City Council
- VIII. Media Outreach**
- Barre Act 46 Web Page: <http://bsuvt.org/joomla/index.php/act-46>
 - Front Porch Forum Postings
 - School Newsletters and Mailings
 - Letters to the Editor; Barre-Montpelier Times Argus
 - Radio Public Service Announcements
- IX. Additional Planned Outreach for September & October**
- Information tables at school athletic, co-curricular, and other events
 - Presentations to service and other local organizations
 - Newspaper inserts and advertisements
 - Postcard mailing to registered voters
 - Lawn signs
 - Exit poll
 - Post-vote online survey

Appendix 8

Act 46 Exploratory Study Report Barre Supervisory Union January 31, 2016

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EXECUTIVE SUMMARY

Introduction:

Act 46 is a far reaching piece of legislation designed to encourage local school districts and supervisory unions to explore the potential benefits of unifying existing governance structures. This law is designed to simplify complex patterns of school governance throughout the state of Vermont in the interest of improving educational quality and opportunity, and to achieve that goal at a more affordable cost. For Barre, this could mean unifying three districts and four school boards into a single district, with one school board, one budget, and one set of policies serving every student in the current Barre Supervisory Union.

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

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

Charge of the Committee:

The committee wishes to emphasize that its sole charge was to explore the potential benefits and challenges of merging/restructuring school districts and boards within the Barre Supervisory Union, not merging schools or changing the current school structures. It is clear that the public has been confused on this issue and some may still believe the discussion is about merging schools; this was not within the charge of the committee. This would be a possible discussion for the unified board in the future should the districts merge.

Currently the needs and interests of Barre students are served by four distinct governance bodies: 2 local elementary school boards, representing the communities of Barre City and Barre Town; one high school union board overseeing the operation of Spaulding Union High School; and one board overseeing the affairs of the entire Barre Supervisory Union.

The overriding question before the committee was whether or not there is reason to believe that merging Barre's current supervisory union into a single, unified school district with one board would lead to improved learning opportunities and outcomes for its students at a more affordable cost for the citizens of Barre City and Barre Town. The work of this study has been to create a blueprint for comprehensively addressing this central question.

Committee Process:

This past summer, the school boards of Barre City and Barre Town voted to form an exploratory study committee, representing both member districts¹, to review and assess current patterns of governance

within the Supervisory Union (S.U.) given the new requirements of Act 46. To facilitate this study, the committee secured a consultant from the *Act 46 Project*, a joint initiative of the Vermont School Boards Association, Vermont Superintendents Association, and Vermont School Board's Insurance Trust.

Over the past four months, the committee met four times in open session. The consultant visited each school in the district and interviewed members of the S.U.'s administrative team, as well as, members of the school boards of Barre City, Barre Town, and Spaulding High School in order to identify key issues for committee deliberation.

The committee has attempted to maintain a transparent record of its work through the ongoing posting to the S.U.'s website of its meeting schedule, minutes, and draft findings. Prior to the completion of this report, the committee held one public forum to elicit comment on its findings and used that feedback to revise and strengthen this final report.

During the course of its work the committee sought to identify:

1. The essential questions that must be answered through a comprehensive 706 study before undertaking any recommendation to change current district governance.
2. The educational opportunities that a new governance structure might create and/or foster; opportunities that might lead to higher levels of student success.
3. The educational and institutional challenges that might attend any decision to restructure the existing configuration of local school districts here in Barre.
4. The financial and organizational changes that if undertaken might make a unified district more effective, efficient, and affordable.

Summary Committee Finding/Recommendation:

As a result of its deliberations, it is the unanimous recommendation of the Act 46 Exploratory Study Committee that the school boards of Barre City and Barre Town authorize a full and comprehensive 706 study process to address the questions, opportunities, and challenges raised by this exploratory report in order to decide whether or not to formulate new Articles of Agreement for the Barre Supervisory Union in keeping with the goals and governance requirements of Act 46 that would be put before the voters of Barre City and Barre Town prior to July 1, 2017.

Respectfully Submitted,
The Act 46 Study Committee
January 31, 2016

¹ "Member Districts", per Act 46, are the districts of the towns within the supervisory union, and do not include unified districts like the Spaulding Unified High School District, which was created by Barre City and Barre Town School Districts

SECTION 1: CHARGE OF THE COMMITTEE

Adopted: November 19, 2015

To identify the major educational, financial, organizational and cultural opportunities and challenges of any consolidation of the governance structures currently administering the educational programs in the Barre Supervisory Union under Act 46.

In fulfilling this charge the committee will submit an Initial Educational Study to each member district in the S.U. outlining the key issues the committee believes must be fully investigated in order for the citizens of Barre City and Barre Town to make an informed decision concerning any plan to restructure Barre's existing supervisory union in order to meet the educational and financial goals of the law.

In an attempt to clarify the phases of work under Act 46, and the language in this document, the committee would also like to clarify the following:

- The Exploratory Study looked at determining whether a more in-depth, comprehensive "706" study² is warranted, and if so what opportunities, challenges, and questions the "706" study should address.
- The more comprehensive "706" study, assuming it happens, will address the opportunities, challenges, and questions identified in the Exploratory Study in more depth and determine whether the communities should vote on merging districts.

² The term "706" comes from 16 V.S.A. Section 706, which defines how a committee is formed to carry out a merger study.

SECTION 2: ESSENTIAL QUESTIONS WITH ASSOCIATED FOLLOW-UP/CLARIFICATION QUESTIONS

As a result of the work of this exploratory study, the following questions emerged as essential in its view for arriving at any recommendation to merge existing district's governance structures within the current Supervisory Union under Act 46.

It is the committee's expectation that any comprehensive study that follows will seek to address these questions fully, and as a result, be in a position to articulate clearly to parents, students, and community members, "What would change, and what would remain the same?" under any recommended change in governance.

- I. Would a unified district governance structure lead to better instructional practices and more effective student educational and social outcomes? Why?**
 - a. What educational opportunities/enhancements might a unified district be in a position to explore and deliver that are not possible under existing governance structures?
 - b. What organizational and financial efficiencies might a unified district be in a position to explore and deliver that are not possible under existing governance structures?
 - c. Would a unified PreK-12 district with a single governing school board be more focused upon and accountable for delivering better student results at every level? Why?
 - d. Would a unified district strengthen and enhance the relationship between the Barre schools and the communities they serve? Why? How?
 - e. To what extent do existing governance structures limit effective patterns of preK-12 planning, administration, accountability, and cost containment? What would it take for multiple boards to think and act with a district-wide focus?

- II. What are the educational, organizational, and cultural challenges associated with moving to a single school board? How might these challenges be addressed, if at all, in a new unified district? How would this new governance structure work in practice?**
 - a. How would the interests of stakeholders in each community - students, parents, community members, and taxpayers - be protected and or enhanced in a unified district? (e.g. representation, parent councils, etc.)
 - b. How would current instructional practice, educational opportunities, and local traditions be protected in any restructuring of district governance?
 - c. How would a unified board be fully responsive to the interests and needs of each school in the district?

- d. Can a unified board really understand and respond to the needs of schools within the district?

III. What are the projected financial, legal, and liability outcomes of consolidating existing school boards into a unified district?

- a. Would a unified district make education more affordable in Barre? How?
- b. How would budgets be combined? What actions are necessary to achieve this? *
- c. What impact would consolidating School Districts' governance structures have on the eligibility and distribution of grants including Title 1 and Free and Reduced Lunch? *
- d. What are the legal, contractual, liability, charter, and/or ownership issues that need to be addressed in any proposed merger?
- e. What are the projected financial obligations in deferred maintenance, health, and building safety that need to be addressed in any merger?
- f. What is the impact on individual tax rates of creating a unified district? What happens to individual tax rates if districts choose not to merge?
- g. What would be the impact, if any, of consolidation on home values in each community?
*

**** Questions added as a result of January 12, 2016 Public Forum***

SECTION 3: EDUCATIONAL OPPORTUNITIES AND CHALLENGES – PRIORITIES FOR FURTHER STUDY

A key factor in arriving at the committee’s decision to recommend a more in-depth study was the identification of a number of compelling educational opportunities that must be addressed before arriving at a final recommendation on unification. The committee also identified a number of significant challenges to address. Given the demands of the law, the committee believes that moving forward with due diligence to explore these issues will prove to be an important and meaningful process for the supervisory union regardless of the outcome and will provide greater justification for whatever final recommendations are made.

In assessing each of these potential areas of educational opportunity and challenge, the committee recommends that a comprehensive study assess each priority by investigating:

- a. How Barre’s current Supervisory Union addresses each identified opportunity or challenge?
- b. Whether a unified district with a single board could address each opportunity or challenge more effectively and why?
- c. How this new approach would lead to better educational opportunities and outcomes for Barre students and/or provide better supports for Barre teachers?

For transparency, all opportunities and challenges identified by the committee and the public are included in this report, even those which the committee determined were outside the charge of the study.

Educational Opportunities and Challenges

OPPORTUNITIES

IDENTIFIED AS HIGHEST PRIORITY:

1. Opportunities to coordinate shared staff (Facilities Director, Transportation Coordinator, Special Ed and Specialized Services), or streamlining staff, administration, and resources (supplies and equipment – including maintenance equipment)
2. Cost savings

IDENTIFIED AS HIGH PRIORITY:

1. Better access to interventions or enrichments
2. More opportunities to expand qualified Pre-K
3. Coordination/alignment of curriculum within grade levels
4. Combining committees
5. More sustainable distribution of expenses and revenue
6. Broader local control...more ideas – city and town responsible for community care

7. Coordination & collaboration of Special Education teachers, better equipped to meet students' needs could decrease the number of para professionals and lead to better outcomes for students with disabilities

ADDITIONAL TOPICS DICUSSED:

16. Opportunity to access improved teaching and teaching styles
17. Teacher expertise, sharing of professional development
18. Opportunity to create magnet schools
19. Opportunity create more equitable opportunities
20. School choice within the district
21. Ability to provide greater variety to students (types of Band, Languages)
22. Administrative collaboration
23. Equitable opportunities for transportation access
24. More efficient busing (less pollution)
25. More coherent transportation plan
26. Engage students who are not engaged through variety
27. Short term tax credit to help with transitional cost
28. Long term sustainability for a school system vs. building
29. Expand social boundaries and foster a stronger sense of community throughout "Barre"
30. Building relationships before high school
31. Smoother high school transition
32. Opportunity for us to teach tolerance, acceptance, patience, and creative problem solving
33. Opportunity to do this at our pace rather than when the State tells us
34. Synergistic implementation of Act 153 & 46³
35. Unified Sports
36. Larger volume of instructional materials at lower cost
37. More opportunities for peer development, both for gifted students, and those trying to meet educational standards
38. All districts are forced in the same direction
39. Opportunities for additional grants
40. All share same policies
41. Teacher cost savings

³ For more information on Act 153 see <http://education.vermont.gov/laws/2010/act-153>

CHALLENGES

IDENTIFIED AS HIGHEST PRIORITY:

1. Community education and understanding of the issues

IDENTIFIED AS HIGH PRIORITY:

1. Engage the community in the change
2. Integrating and passing budgets
3. Fairness – equitable distribution of assets, e.g. buses
4. Leadership challenges: blending of philosophies and styles, goals, objectives and traditions
5. Integrating three governing bodies into one
6. History of division between the communities (cultural, expectations – adults may have more of an issue than students)
7. New Board members learning about each school and how it works
8. Showing a true savings to the taxpayers

ADDITIONAL TOPICS DISCUSSED:

1. Diversity of board member knowledge
2. Transportation
3. Loss of opportunities (“small fish in a big pond”)
4. Demographic challenges between the two districts
5. Leadership challenges – create other avenues for involvement and engagement
6. Paying for buses/busing
7. How does seniority work between the two different schools
8. If schools unified into one PK-4 and one 5-8 would you have more competition and less students able to participate on school teams and would that lead to less kids being engaged in sports and physical activity
9. Logistical issues for parents with children in different schools
10. Equity of instruction: training for teachers, learning for students (One school may have more opportunities or money for staff training/education)
11. Fewer mentoring opportunities between higher and lower grades
12. Managing change effectively
13. Different school board / governance structure (equity, feelings of equality, equal voices among the community)
14. Are Charter changes required
15. Challenge to learn finances of each school
16. How does it affect property values
17. Keep buildings as they are
18. Harder to find school board members
19. Composition of school board
20. Division of Transportation services
21. Administrative personnel and how they work and how the board gets to know them
22. Teacher placement
23. Recreation facilities

SECTION 4: FINANCIAL/ORGANIZATIONAL OPPORTUNITIES - PRIORITIES FOR FURTHER STUDY

An important goal of Act 46 is to create more sustainable, transparent, and accountable models of school governance that lead to more opportunity and better student achievement at “a cost that parents, voters, and taxpayers value.” The following financial and organizational issues emerged as worthy of further study to fully inform any final recommendation.

VI. State Tax Incentives over 4/5 years; Merger Implementation Grants

VII. Large Scale Purchasing/Contract Negotiation with Private Vendors

- ✓ Technology
- ✓ Books & Supplies
- ✓ Maintenance Needs

VIII. Shared Administrative, Staffing, and Service Delivery Models

- ✓ Coordinate Teaching/Staffing Assignments (Responding to changing school demographics, program, and building needs)
- ✓ Eliminate Administrative Redundancy
- ✓ Streamline Existing Service Models (Transportation, Maintenance)
- ✓ Coordinate Financial Administration/Reduce Bureaucracy
 - One audit Instead of Four
 - Fewer Board Stipends
 - Board Services/Support (Stenographer, Legal, Dues, etc)
 - Purchasing Process
- ✓ Increase Efficiency in State and Federal Data Collection and Reporting
- ✓ Coordinate Use of Facilities

IX. Further Collaboration of Special Education and Behavioral Management Services

- ✓ Review of out-of-house vs in-house delivery models and opportunities
- ✓ Alternative Program Delivery

X. Asset Coordination

- ✓ Transportation
- ✓ Buildings and Grounds
- ✓ Differed Maintenance
- ✓ Long-Term Capital Planning

SECTION 5: SUMMARY RECOMMENDATION:

As a result of its deliberations, it is the unanimous recommendation of the Act 46 Exploratory Study Committee that the school boards of Barre City and Barre Town authorize a full and comprehensive 706 study process to address the questions, opportunities, and challenges raised by this exploratory report in order to decide whether or not to formulate new Articles of Agreement for the Barre Supervisory Union in keeping with the goals and governance requirements of Act 46 that would be put before the voters of Barre City and Barre Town prior to July 1, 2017.

Respectfully Submitted,
The Act 46 Study Committee
January 31, 2016

Motion of the Committee on January 21, 2016:

Ms. Lamb moved to recommend to the communities and the Boards of the Barre City and Barre Town School Districts, to move forward with forming a 706 Study Committee, contingent on receipt of a Code 3718 grant. Mr. Walz seconded the motion.

The Committee unanimously approved the motion to recommend to the communities and the Boards of the Barre City and Barre Town School Districts, to move forward with forming a 706 Study Committee, contingent on receipt of a Code 3718 grant.

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Barre Supervisory Union - School District Data

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| FY'13 ADM | 731.30 | 914.16 | 861.50 | 83,139.20 |
| FY'13 Educational Spending per Equalized Pupil (ES/EP) | 11,580.03 | 10,959.55 | 10,610.68 | 12,788.90 |
| FY'13 Student-to-Teacher Ratio | 7.6 | 10.2 | 10.9 | 10.7 |
| FY'13 Student-to-Adult Ratio | 5.1 | 5.7 | 6.9 | 5.5 |
| FY'13 Teacher-to-Administrator Ratio | 26.67 | 45.3 | 26 | 9.7 |
| FY'13 Student-to-Administrator Ratio | 202.5 | 465 | 285 | 103 |
| FY'13 Ave. Teacher Salary (\$44,415 for S.U.) | \$40,761 | \$46,327 | \$47,973 | \$54,420 |
| | | | | |

APPENDIX B: COMMENTS/FEEDBACK FROM COMMUNITY FORUM

Essential Questions

1. How do we make the new Board equitable? Board Size?
2. What is the cost of this process to combine the districts?
3. Cost & savings (itemized)?
4. Are their 2 tiers of governance being discussed? (1) boards and (2) schools
5. What would a consolidated board look like? (Membership, size, relation to administrators, etc., Adequate representation of stakeholders from various communities)
6. How will budgets be combined? What actions are necessary?
7. What will be the impact of consolidation on home values in each community?
8. Will consolidation impact community input (voting) on total budget?
9. How would budget be developed under a consolidated board?
10. How will distribution and eligibility for Title grants be affected?
11. What is the built in longevity of consolidation? Can the status be maintained over years? Can assurances be built into the Articles of Agreement?
12. How will success/effectiveness be measured? What will determine success?
13. What are the controls for assuring positive changes and continued success can be built into consolidation agreements(s)?
14. Transportation questions may be resolved through consolidation(?)
15. How do we make this equitable for everyone?
16. How to choose # of school board members?
17. Has this been done in other places?
18. How do we know it will work or will be better?
19. What is the evidence?
20. What are the metrics to measure?
21. How does consolidation impact challenges with budgets?
22. What about sports?
23. What about grants/funding for students with special needs/circumstances?
24. How can opportunities be missed/gained based on a school's demographics (Title 1, other grants)?
25. Depending on the structure of subcommittees, could a school be "slighted" on services including but not limited to facilities spending?
26. Could the structure of the schools change, (students moved, grades moved etc.)?
27. More solid information on money savings, and associated benefits would help in making a decision.

Opportunities

1. Stability in Superintendent and Business Manager positions
2. Consistency
3. Equalized per pupil cost is already very similar
4. Keep wide variety of opportunities for students with variety of interests (art, music, drama, etc.)
5. Equitable expenses between school; fairness (?)

Challenges

1. Equitable expenses between school; fairness
2. Need to maintain clear line of thought between governance consolidation and actual school consolidation
3. Most are anxious/confused about combining schools
4. Finance piece
5. Not knowing what I do not know
6. Concern about the size of unified/district school board

APPENDIX C: ACT 46 EXPLORATORY STUDY COMMITTEE MEMBERS

Chad Allen – Barre Town Board Member

Giuliano Cecchinelli – Barre City Board Member

Alice Farrell – Barre Town Community Representative

David LaCroix – Barre Town, SHS Board Member

Kerri Lamb – Barre Town Community Representative

Ashlyn Smith – Barre City Community Representative

Sonya Spaulding – Barre City Board Member

Mark Tatro – Barre City, SHS Board Member

Brent Tewksbury – Barre Town Board Member

Tommy Walz – Barre City Community Representative

SUPPORTING PERSONNEL

John Pandolfo – Superintendent of Schools

Peter Clarke – Act 46 Consultant

Study Committee Worksheet for All Phases of Voluntary Merger

Please submit this to the Agency with the Study Committee Report

| Current Supervisory Union or Unions (list each) | Potentially Merging Districts Pursuant to 16 V.S.A. § 706b(b)(1)-(2) (list each) | Is the District: | |
|--|---|------------------|-----------|
| | | Necessary | Advisable |
| Barre Supervisory Union | | | |
| | Barre City | x | |
| | Barre Town | x | |
| | Spaulding Union High School District (including the Central Vermont Career Center) | x | |
| | | | |
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| | | | |
| | | | |

| 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) | |
| <p>A Regional Education District (RED) or one of its variations (Act 153 (2010) and Act 156 (2012))</p> <p><input checked="" type="checkbox"/> RED (Act 153, Secs. 2-3, as amended by Act 156 , Sec. 1 and Act 46, Sec. 16)</p> <p><input type="checkbox"/> Side by Side Merger (Act 156 , Sec. 15) Districts involved in the related merger:</p> <p><input type="checkbox"/> Layered Merger (Union Elementary School District) (Act 156, Sec. 16)</p> <p><input type="checkbox"/> Modified Unified Union School District (MUUSD) (Act 156, Sec. 17, as amended by Act 56 (2013), Sec. 3)</p> | |
| <input checked="" 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)): 11/08/16 | |
| Date on which the new district, if approved, will begin operating (16 V.S.A. § 706b(b)(12)): 7/1/2017 | |
| Combined ADM of all “necessary” districts in the current fiscal year: FY17: 2,388.11 (ADM 17) | |
| Proposed name of new district: Barre 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>Operational efficiency should result by utilizing already existing resources to provide for an increase in the quality and equity of educational opportunities for Barre students without increasing the level of taxpayer support needed to achieve those same goals.</p> <p>Improve opportunities for teacher leadership to support consistency across content areas PreK-12.</p> <p>Coordinate individual school schedules at various levels in order to:</p> <ul style="list-style-type: none"> A. Improve equity B. Enhance opportunities for professional collaboration across schools C. Share staff across schools (e.g., world languages, music education, technology education, special education) D. Improve opportunities for gifted learners, struggling learners, etc. E. Share specialized resources more easily (e.g., Occupational Therapy, Physical Therapy, English Language Learning, alternative educational programs, School Resource Officers, Student Assistance Professionals) F. Differentiate learning opportunities for students including greater exposure to the career center, community service learning and elective courses <p>Continuing and increasing coordination of Special Education services, PreK-12, would more effectively address the specific needs of students with disabilities.</p> <p>(Also: See Final Report, Goal 1, Page 12)</p> | |
| | <p>Barre City and Barre Town already share a high</p> | |

| | | |
|--|---|--|
| <p><u>Goal #2:</u> The proposed union school district will lead students to achieve or exceed the State’s Education Quality Standards, adopted as rules by the State Board of Education at the direction of the General Assembly.</p> <p><i>Act 46, Sec. 2(2)</i></p> | <p>school. Unification would further the development of a single PreK-12 educational vision for all students and the important work of strengthening and aligning the educational programs. It will increase opportunities for sharing best practice and supporting teachers throughout the district. Greater focus on the big picture, along with better coordination of the programs and services offered - specifically regarding the way we plan and implement curriculum, programs, policies, and procedures across three schools – will result in an even better education for all students.</p> <p>Unification would allow the Superintendent and the district’s full administrative team to focus more on leading and developing the district’s educational programs than the day to day administrative work of preparing, coordinating, and serving the policy and administrative needs of multiple school boards (e.g. 4 budgets, multiple board meetings, etc.). Over the long term, this might also help us attract and retain good leaders.</p> <p>(Also: See Final Report Goal 1, page 12)</p> | |
| <p><u>Goal #3:</u> The proposed union school district will maximize operational efficiencies through increased flexibility to manage, share, and transfer resources, with a goal of increasing the district-level ratio of students to full-time equivalent staff.</p> <p><i>Act 46, Sec. 2(3)</i></p> | <p>A single, unified board could prioritize the ongoing capital needs of the entire district (technology infrastructure, building repairs, future school renovations). This would ensure that the district’s educational programs get the investments in technology and infrastructure they need to deliver a quality education to every Barre student, supported by the increased efficiencies and economies of scale that attend a larger, more operationally streamlined district.</p> <p>Maximizing Efficiencies would include:</p> <p>A. Large Scale Purchasing/Contract Negotiation with Private Vendors</p> <ul style="list-style-type: none"> d. Technology e. Books & supplies | |

| | | |
|---|--|--|
| | <p style="text-align: center;">f. Maintenance needs</p> <p>B. Shared Administrative, Staffing, and Service Delivery Models</p> <ul style="list-style-type: none"> g. Coordinate teaching/staffing assignments (responding to changing school demographics, program, and building needs) h. Eliminate administrative redundancy i. Streamline existing service models (transportation, maintenance) j. Coordinate financial administration/reduce bureaucracy <ul style="list-style-type: none"> v. One audit instead of four vi. Fewer board stipends vii. Board services/support (stenographer, legal, dues, etc) viii. Purchasing process k. Increase efficiency in state and federal data collection and reporting l. Coordinate use of facilities <p>C. Further Collaboration of Special Education and Behavioral Management Services:</p> <ul style="list-style-type: none"> c. Review of out-of-house vs in-house delivery models and opportunities d. Alternative program delivery <p>D. Asset Coordination</p> <ul style="list-style-type: none"> e. Transportation f. Buildings and grounds g. Deferred maintenance h. Long-term capital planning | |
| <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>To achieve the goal of promoting greater transparency and accountability, the new unified union board would work to:</p> <ul style="list-style-type: none"> 6. Enhance board knowledge of all schools rather than just one. This will afford additional opportunities | |

for PreK-12 strategic thinking and planning including reflection on lessons learned in one school to be applied elsewhere.

7. Work to create a unified set of district-wide educational goals and policies aimed at:
 - g. The effective coordination of initiatives (e.g. common school improvement plans).
 - h. The alignment of social-emotional curriculum across the district (e.g. PBIS, Development Design, Trauma-Informed Schooling).
 - i. The alignment of student information system usage and data management tools, including training for all teachers to more effectively use individual and aggregate student data to improve instruction.
 - j. A unified program of educator recruitment, induction, and mentoring (including paraprofessionals and substitutes).
 - k. The creation of a unified student handbook reinforcing common standards of behavior and school culture.
 - l. The creation of a unified staff handbook promoting professional standards of conduct and instructional best practice.

8. Develop and foster district-wide planning and accountability systems focused on:
 - g. A sustained emphasis on analyzing common data points across all schools, programs, and students.
 - h. A single, agreed upon set of strategic priorities at the board level, the administrative level, and instructional level.
 - i. The promotion of clear and transparent vertical curriculum alignment.
 - j. The needs of all students rather than on specialized interest groups.
 - k. The communication of a clearer, more

| | | |
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| | <p>focused, more integrated picture of the work of Barre’s schools.</p> <ol style="list-style-type: none"> 1. Fostering new avenues for community engagement and input led by Board members. (e.g. school-based councils) <p>9. Restructure current leadership patterns and responsibilities to ensure:</p> <ol style="list-style-type: none"> c. More time for administrators to be instructional leaders by allowing time for administrators to meet with counterparts across and outside the district d. Less time spent preparing for meetings (e.g. improved operational efficiencies would provide more time for central office administrators and building principals to serve in their primary role as instructional leaders) <p>10. Establish a yearly standardized list of agenda topics for monthly/semimonthly meetings to put a more efficient structure to board meetings. The Board could clearly express its policy-driven and goal-driven desires about what information it wants to review. This process would also foster public engagement through a well-warned exploration of key issues of interest to parents and community members.</p> | |
| <p><u>Goal #5:</u> The proposed union school district will deliver education at a cost that parents, voters, and taxpayers value.</p> <p><i>Act 46, Sec. 2(5)</i></p> | <p>In addition to achieving the educational and operational goals noted above, The Committee believes that central to achieving Goal 5 is fostering a new, unified sense of community identity and culture within the new Barre Unified Union School District.</p> <p>Community members need to engaged and involved in their schools in order to responsibly contribute to and evaluate whether the district is delivering a quality education at a cost that parents, voters, and taxpayers</p> | |

| | | |
|--|--|--|
| | <p>value.</p> <p>To achieve this goal, the new unified union will work to:</p> <ol style="list-style-type: none"> 1. Consolidate school websites to promote a common identity and establish improved patterns of communication and outreach. 2. Coordinate community activities across schools so that certain functions could take place in one school but serve families from all schools. (Examples: District music concerts, district art shows, SAP speakers, open houses) 3. Celebrate district-wide examples of educational progress and student achievement. 4. Explore ways to unify or coordinate PTA/parent council activities 5. Foster district-wide opportunities for outreach to community and municipal organizations and leadership groups. 6. Initiate regularly held committee meetings to facilitate community input and monitor the implementation of policy by administration (e.g. school-based councils, community forums, and open houses). 7. Explore creative governance structures that encourage non-voting, community representation and engagement on standing board committees in order to foster greater community input and engagement in the development of board policy. | |
| <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</p> | <p>None. No districts would be left geographically isolated as a result of the creation of this proposed unified union school district.</p> <p>(Also, see – Neighboring Districts: Final Report, page 8)</p> | |

| | | |
|---|--|--|
| <p>other districts geographically isolated?</p> <p><i>Act 46, Section 8(a)(2)</i></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>PK – 12</p> <p>None</p> | |
| <p>(4) The cost and general location of any proposed new schools to be constructed</p> <p>The cost and general description of any proposed renovations</p> | <p>No new schools will be constructed as a result of this merger.</p> <p>No renovations are proposed as part of this merger.</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</p> | <p>Upon an affirmative vote of the electorate in both Barre City and Barre Town on November 8, 2016 and certification of the final vote of each district by the Vermont Secretary of Education to the Vermont Secretary of State per 16 VSA § 706g, the new Barre Unified Union School District would come into existence and have all of the authority necessary for it to prepare for full educational operations beginning on July 1, 2017.</p> <p>The Barre Unified Union School District would, between the date of its first organizational meeting under 16 VSA – 706j and June 30, 2017, undertake all</p> | |

provisions of law, including 16 V.S.A. chapter 53, subchapter 3 (transition of employees)

of the planning and related duties necessary to begin operations of the new unified union school district on July 1, 2017, including:

- i. Preparing for and negotiating contractual agreements;**
- j. Preparing and presenting a budget to the voters for fiscal year 2018;**
- k. Preparing for the Barre Unified Union School District annual meeting, March 7, 2017;**
- l. Transacting any other lawful business that comes before the Board.**

The authority exercised by the new Barre Unified Union School District shall not limit or alter the ongoing authority and/or responsibilities of the school boards that make up the current Supervisory Union which will remain in existence during the transition period for the purpose of completing any and all business not given under law to the new unified union district board. In essence, each individual district board would maintain its current authority until the new district becomes operational on July 1, 2017.

On July 1, 2017, when the Unified District becomes fully operational and begins to provide educational services to students, the school districts of the forming towns shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the Unified District under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2017. Upon the completion of outstanding business or December 31, 2017, whichever date is earlier, the forming school districts shall cease to exist pursuant to 16 VSA §722. The Barre Supervisory Union shall cease all operations within a reasonable timeframe of the completion of all outstanding

business of its member school districts, but in no event any later than January 31, 2018.

In summary, an affirmative vote of the electorate in both Barre City and Barre Town would also result in, but not be limited to, the following:

- m. Employees throughout the current Supervisory Union offered continuing employment following the 2016-2017 school year, consistent with all legal requirements, would become employees of the new Barre Unified Union School District.
- n. All assets of the pre-existing districts would be transferred to the new unified union district for the sum of \$1.00 as of July 1, 2017.
- o. Debts and liabilities of the pre-existing districts and supervisory union would be transferred to the new unified union district as of July 1, 2017.
- p. Following the certification of the election results by the Agency of Education to the Secretary of State (30-45 days after the vote), an organizational meeting of the new unified district would be convened by the Secretary of the Agency of Education or designee in accordance with Title 16, 706j.
- q. The newly elected members of the Barre Unified Union School District, consistent with statute, would begin the work of preparing for the district's first day of operations - hiring a superintendent, defining administrative and operational roles and responsibilities, establishing policy, negotiating contracts, developing budgets, and establishing new structures for community engagement.

| | | |
|--|---|--|
| | <p>r. Through June 30, 2017, the four pre-existing boards of the supervisory union would continue to govern their respective districts and/or schools. The existing districts and supervisory union will remain in operation after July 1, 2017 only to conclude any business.</p> | |
| <p>(6) The indebtedness of the proposed merging districts that the proposed union school district shall assume.</p> | <p>See Appendix 2 – Final Report</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>See Appendix 2 – Final Report</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 | <p>The Barre Unified Union Board of School Directors shall have nine (9) members, with four (4) residing in and representing Barre City; four (4) residing in and representing Barre Town; and one (1) elected at-large by the voters of both municipalities. The Barre Town and Barre City specific numbers of directors are consistent with current census figures. Each time there is a new decennial census, the proportionality of the Barre Town and Barre City specific numbers of directors shall be aligned to the new counts if necessary.</p> <p>The Board member elected at-large shall be subject to</p> | |

| <p>representative * see also 16 V.S.A. § 706k(c): one or more at-large directors * see also 16 V.S.A. § 707(c): weighted voting</p> | <p>voting by the electorate in both forming districts, with the candidate receiving the highest vote total prevailing. The eight Board members representing a specific municipality shall be subject to voting only in their municipality of residence, with the candidate(s) receiving highest vote totals prevailing.</p> | | | | | | | | | | | | | | | | | |
|---|--|-----------------------------------|-----------------------------------|-----------------------------------|-----------------------------------|-------------------|----------|----------|----------|-------------------|----------|----------|----------|------------------|----------|----------|----------|--|
| <p>(10) The term of office of directors initially elected, to be arranged so that one-third expire on the day of each annual meeting of the proposed union school district, beginning on the second annual meeting, or as near to that proportion as possible</p> | <p>School Directors will be elected by Australian ballot for three year terms, except for those initially elected at the time of the formation of the new Unified District (Barre Unified Union District). In the initial election of School Directors, the terms of office will be as follows:</p> <table border="1" data-bbox="573 835 1352 1142"> <thead> <tr> <th>Town</th> <th>Term ending March 2018</th> <th>Term ending March 2019</th> <th>Term ending March 2020</th> </tr> </thead> <tbody> <tr> <td>Barre City</td> <td>1</td> <td>2</td> <td>1</td> </tr> <tr> <td>Barre Town</td> <td>2</td> <td>1</td> <td>1</td> </tr> <tr> <td>At- Large</td> <td>0</td> <td>0</td> <td>1</td> </tr> </tbody> </table> <p>The terms of the initial school directors indicated above will include the months in between the organizational meeting and the first annual meeting.</p> | Town | Term ending March 2018 | Term ending March 2019 | Term ending March 2020 | Barre City | 1 | 2 | 1 | Barre Town | 2 | 1 | 1 | At- Large | 0 | 0 | 1 | |
| Town | Term ending March 2018 | Term ending March 2019 | Term ending March 2020 | | | | | | | | | | | | | | | |
| Barre City | 1 | 2 | 1 | | | | | | | | | | | | | | | |
| Barre Town | 2 | 1 | 1 | | | | | | | | | | | | | | | |
| At- Large | 0 | 0 | 1 | | | | | | | | | | | | | | | |
| <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> | <p>Australian Ballot Voting (Article 12)</p> <p>The Barre Unified Union School District shall vote the annual school district budget and public questions by Australian ballot. In the Australian ballot voting, the ballots shall not be commingled between Barre City and Barre Town, with each merging district’s votes to be counted separately before a determination of total combined votes.</p> <p>School Restructuring and Closing (Article 13)</p> | | | | | | | | | | | | | | | | | |

Any proposal by the district's new unified board of directors to restructure the district's current elementary school configuration into one elementary and one middle school may not be considered for 5 years. Additionally, per Act 153, Section 3(d) no school may be closed during the first four years of operation of a new Regional Educational District without the approval of the electorate of the town in which it is located.

Redistricting/Choice (Article 14)

For the first five years of the operation of the Barre Unified Union School District, students in elementary schools (Prek-8) will attend school in their current town of residency; provided however with parental consent, the Board may adjust student enrollment based upon individual circumstances and the needs of the Unified District. After the first five years the board will have the authority to adjust school attendance boundary lines with a 2/3rds (supermajority) vote of the Board.

Students and their families may voluntarily request assignment at another elementary school (Prek-8) according to policies on intra-district choice established by the Board.

Local Input (Article 15)

The new unified board shall ensure ongoing opportunities for local input on policy and budget development. Structures to support and encourage public participation within the Barre Unified Union School District will be established by the Board on or before June 30, 2017.