

**Lincoln Supervisory District Progress Report**  
**Prepared for the State Board of Education**  
**February 10, 2023**

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

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

## **Areas of Activity**

### **1. Finance, Personnel & Data Management**

#### **a. Budget approval and funding for planning and transition activities**

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

- LSD developed a Transition Fund budget of \$100,000 to cover expenses from 5/18/2022 - 7/30/2023 for the purpose of “taking all steps necessary for the district to assume sole responsibility for the education of Lincoln students in a manner that meets education quality standards and all other state and federal laws on July 1, 2023.” (SBE minutes, May 18, 2022)
- In August 2022, LSD held its first Annual Meeting during which voters approved the LSD Board to raise and spend \$50,000 in non-taxpayer revenue to cover transition expenses.
- At the time of this report, LSD has over \$90,000 in private donations in the Transition Fund and has spent approximately \$35,000.
- At its next Annual Meeting on April, 11, 2023 LSD voters will be asked to approve spending up to the balance in the Transition Fund and, should funds remain as of June 30, 2023, to place them in a reserve fund, the creation of which will also be voted at the Annual Meeting.

- Use of these funds is for one-time, non-educational spending related to the transition.
- No municipal funds from the Town of Lincoln have been used to support the expenses of Lincoln's transition to a Supervisory District

#### **b. Financial and operational modeling and first year budget**

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

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

- Engaged a former Operations Manager and Business Manager for two Vermont. SUs/SDs as a consultant to support budget modeling (Attachment B)
- Engaged a retired Vermont school administrator with 35 years' experience in special education and district management, to serve as LSD's Acting Superintendent (Attachment A)
- Engaged a community member with extensive financial, administrative, technology and systems management experience to oversee technology implementation as well as advise on business operations. (Attachment C)
- Created Finance, Facilities Management, Hiring, and Transportation Committees to focus on those specific areas.
- Obtained enrollment and staffing information from MAUSD and continues to work with MAUSD to ascertain additional information relevant to LSD operations
- Consulted with staff working in the Lincoln Community School about continuing as part of the LSD (the vast majority of which want to stay) and began the process of negotiating new contracts for teaching and administrative staff with VTNEA representatives.
- Developed job descriptions and began recruiting and interviewing candidates for vacant positions
- Reviewed individual special education plans to assess the adequacy, appropriateness and cost of special ed interventions and develop a budget for excess spending
- Used tools from and worked directly with individuals in the AOE Department of Finance to develop revenue projections
- Used information and methodologies provided by the AOE and VT Tax Office to develop tax rate projections
- Engaged in discussions/negotiations with potential service providers for transportation and technology
- Engaged with the Vermont Bond Bank and began the administrative process of assuming the debt on the Lincoln Community School building.
- Reached out to MAUSD about the potential to purchase services for food service, but will plan to build internal capacity to provide these services if necessary

- Liaised with neighboring public and middle/high schools to gather tuition and enrollment information and establish relationships and procedures for tuitioning of Lincoln's 7-12 graders
  - Completed negotiation of the Financial Withdrawal Agreement with MAUSD.
- Provide the final draft of the first-year budget, accompanied by a presentation or discussion of how the budget will ensure compliance with federal and other budgeting requirements and is connected to LSD's goals and priorities. The update should identify the sources of all funding and provide details of requirements and application deadlines for grants upon which LSD will depend for revenues during its first year of operations.

See Attachments D1 and D2 for the current draft of the FY24 LSD Budget, which includes tax rate calculations. Small adjustments may continue until it is warned in early March for vote by the District electorate at the LSD Annual Meeting on April 11, 2023.

The budget was developed by a highly experienced former VT SU/SD business manager to ensure compliance with federal and other budgeting requirements. A primary goal of the Board for the coming year is to ensure stability and consistency at the Lincoln Community School – for students, families, and staff -- even as changes related to being a Supervisory District unfold. The budget therefore funds the same level of staffing and programming at LCS as the current year and does not anticipate significant changes to school operations.

The budget supports a streamlined central office, which will be housed in the Lincoln Community School, aligning with a Board priority of directing as much funding as possible to school staff and programs. However, it also supports central office staff salaries sufficient to attract experienced district administrators, to provide a smoother start up and support stability in the coming year.

The amount of the Small Schools Grant was calculated and provided by Brad James, AOE Department of Finance. Grant Income of \$60K is an estimated total for Medicaid, EPSDT, IDEA-B, IDEA-B PS, Best, Act 230, VSBIT, and other small grants. A schedule of grant eligibility requirements and application deadlines is currently being developed.

### **c. Accounting & Internal Controls**

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

LSD will maintain accounting systems and records that ensure transparency and accountability for all funds, regardless of source, and provide complete, accurate, reliable, and timely data for reporting, including: (a) maintaining accounting records in accordance with Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board principles (GASB) and (b) recording and

reporting information consistent with Vermont's Uniform Chart of Accounts within the SD's accounting software.

LSD is recruiting a Business Manager with experience in VT school financial and business operations, including full knowledge of GAAP, GASB, Vermont's Uniform Chart of Accounts, as well as policies and procedures outline in the VT AOE Handbook for Financial Accounting of Vermont School Systems. LSD is currently negotiating a contract with Tyler Technologies for an accounting package that will enable recording and reporting consistent with Vermont's Uniform Chart of accounts.

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

An experienced Superintendent, Business Manager, and Special Education Director, supported by the necessary financial accounting tools (included in the Tyler Technology package), will ensure the SD spends its federal funds effectively and efficiently to prevent reversion of funds. The LSD Board will regularly review reports of grant spending as well as all monthly financial reports.

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

The LSD Board is in the process of adopting policies and procedures governing internal controls and procurement and contract administration. A requirement for the Business Manager is experience implementing and overseeing adherence to these processes. The VT AOE Internal Financial Controls Checklist for Schools will be used to ensure the integrity of these systems.

<https://auditor.vermont.gov/sites/auditor/files/documents/Internal%20Financial%20Controls%20Checklist%20for%20Schools%20v.1%20%20Fillable%20with%20digital%20signature.pdf>

#### **d. Personnel Management**

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

LSD will create and adopt personnel management policies and practices using model policies from the VSBA and those of other SU/SDs to ensure equitable and inclusive practices and adherence to federal and State law. Policies will be reviewed by LSD

legal counsel as necessary. A requirement for both the Business Manager and Superintendent positions is experience with personnel policies and practices.

#### **e. Data Management**

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

LSD is currently negotiating contracts with Tyler Technologies, Power School, and Goldview to ensure educational records are collected in a form to meet interoperability requirements specified by the Agency of Education. Financial and personnel information will be managed using modules from Tyler Technologies. Information regarding special education and 504 plans will be managed using Goldview, and student information will be managed using Power School. Metrics to evaluate programs and student performance and data will be gathered and tracked using summative, informative assessments developed by LSD along with State and Federally required assessments. Information will be shared with the community through the LSD Annual Report and other existing communication vehicles.

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

LSD has a FERPA policy in place and LCS staff have received and will continue to receive annual FERPA training. Hard copies of student records will be housed in the Supervisory District office (within the Lincoln Community School) in locked, fireproof file cabinets with the names of individuals allowed to access the files posted on the file cabinet. Central Office staff will ensure hard copy and electronic files are held for the required amount of time based on the Special Records Schedule for Supervisory Unions (SRS-1897) updated by the VSARA on 12/16/2021.

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

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

The LSD Board negotiation team has begun meeting with VTNEA and union representatives of LCS teachers and administrative staff to negotiate new contracts for each employee group. The existing contracts with MAUSD will serve as the basis for negotiation and meetings are scheduled in February and March. LSD has discussed transition of staff with MAUSD and will provide teachers desiring to stay at LCS with Letters of Intent to Hire in mid-March to ensure they have time to consider their options

of working for LSD or continuing employment with MAUSD. Currently, the majority of teaching and administrative staff at the Lincoln Community School intend to stay.

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

LSD is currently negotiating a contract with Tyler Technologies for implementation of an accounting system that will include a payroll module. Based on cost, LSD may implement the HR module for the coming year or may wait until the following year to spread out technology costs. Should the decision be made to wait, the Superintendent, Business Manager, and Admin Asst will develop an alternative time-tracing and absence management system.

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

See Attachment E for an organizational chart of the Lincoln School District, including the Central Office and the Lincoln Community School.

- LSD has completed interviewing and will soon make an offer for the Special Education Director
- LSD is currently negotiating with an individual for the position of Business Manager.
- LSD is currently recruiting for the Superintendent position
- LSD is currently interviewing for the Math Teacher/Apprentice Principal position
- LSD has commitments from staff (pending successful contract negotiations) for all positions with an asterisk (\*)
- LSD is currently interviewing, or offers are pending, for those positions with a plus sign (+)

- Services for Facility Maintenance, Technology Support and Speech Pathology will be contracted out and are marked with an (^). Discussions are underway or will begin soon with potential providers of these services
- Food Service and Extended Learning Program staff are not currently in the org chart pending additional discussion with MAUSD, however funding for these programs is included in the budget.
- Job descriptions exist for all current positions at LCS. Job descriptions for new positions were developed by adapting standard language used by VT school districts for similar positions.

Recruitment processes have initiated at the local level, with open positions posted on Front Porch Forum and circulated through word of mouth and specific outreach. In instances where this does not provide a strong candidate pool, positions will be posted on SchoolSpring and other recruitment vehicles with a broader reach. A Hiring Committee comprised of two Board Members, the LCS Principal, an LCS teacher, the Acting Superintendent and a community member interviews prospective candidates. The Acting Superintendent conducts reference checks for applicants that move forward and makes a recommendation to the Board on a hiring decision.

Within the Lincoln Community School, the title of individual positions reflects the responsibilities of the position. At the Central Office level, the Business Manager (with the support of the Admin Asst) will be responsible for, among other things, financial and HR management, contracts and work of external service providers for Facility Maintenance and Technology, and any services purchased from MAUSD.

Among other things, the Special Ed Director is responsible for special education and student support services and the required reporting and data management and is the LEA special ed students in Gr 7-12 students in out-of-districts schools. The Superintendent, among other things, is responsible for District management, central office leadership and supervision, supervision of the principal, and data management for AOE reporting and development of data-driven continuous improvement plans.

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

LSD will employ a part-time special educator in the Lincoln Community School and the part-time Special Education Director position will be equally dedicated to Lincoln students. Strong relationships already exist between the Special Educator, students, parents, teachers and service providers that drive the consultative process. Student assessments will be conducted by the Counseling Services of Addison County. Students eligible for special education services that cannot be met by in-school staff will be provided through a contract with the Counseling Services of Addison County (CSAC) or other service providers.

### 3. Transfer of Resources & Records from MAUSD

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

Transfer of the school building to LSD is included in the Exit Agreement between MAUSD and LSD. Exit Agreement negotiations were recently concluded and the document is awaiting execution. LSD has initiated paperwork with the Vermont Municipal Bond Bank to assume the bond debt on the building by July 1, 2023, and VSBIT is developing a quote for LSD insurance coverage, including for the building and its contents as well as general liability.

LSD has a Facilities Committee comprised of Board and community members with significant experience as builders, carpenters and in building maintenance. The committee is responsible for retrieving and reviewing all documentation related to the building and grounds maintenance, preparing a list of maintenance contracts and their terms, preparing a schedule for on-going maintenance, and developing a Scope of Work for facilities management services that LSD will put out to bid. Steps to retrieve the documentation from MAUSD recently began.

The LSD Business Manager and Superintendent will be responsible for reviewing, re-negotiating or entering into new contractual relationships as necessary.

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

LSD has completed a review of the files of all Lincoln students with IEP and 504 plans to understand and ensure the appropriateness of the services they are receiving. Data for special education students will be maintained in the Goldview electronic data management system and discussions have begun with MAUSD to coordinate the transfer of both hard copy and electronic data.

### 4. Adoption & implementation of policies and procedures

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



See Attachment F for the list of approved/adopted policies, a list of those pending approval and adoption, and a timeline to complete the process of adopting policies and procedures mandated under state and federal law. LSD priorities follow guidelines provided by the Vermont School Board Association for mandatory policies and include policies of particular importance to LSD such as school choice and tuitioning policies. All mandatory policies and procedures will be in place by July 1, 2023 and policy work will continue over the course of the year.

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

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

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

2021.3 MAUSD has a robust, needs-based professional development plan, created with involvement of LSD staff. LSD will refine the existing professional development plan to meet LSD-specific needs and priorities. LSD has also requested, and MAUSD is considering, allowing LSD staff to continue to participate in relevant professional development initiatives, at its own cost. Staff professional learning needs are identified by self-reporting, student outcome data, observation, and staff assessments. This is a responsibility of the Superintendent and the Principal.

2021.5 The Lincoln Community School currently provides tiered systems of support for students in line with the size and needs of its student populations (ie. special education, positive behavior coach, guidance counselor, speech pathologist, nurse) and has budgeted to continue to provide (and evolve as needed) these supports utilizing in-school staff and/or contracts with outside agencies. This is the shared responsibility of the Superintendent, Principal, and Special Ed Director.

2121.1 LSD has and will continue to administer assessments of student performance using methods developed by the State Board of Education under 16 V.S.A. §164 and

shall account for 100% of its student in regard to their participation in the state assessments. This is the responsibility of the school Principal.

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

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

## 5. Facilities Management & Safety

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

The Lincoln Community School will employ a full-time custodian responsible for ensuring the cleanliness and daily functioning of the school building. The Facilities Committee will develop a plan for ongoing building maintenance and develop a Scope of Work for and help identify an individual or service that can fill the function of Facilities Manager. LSD will utilize services offered by VSBIT for building safety and security audits.

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

- Describe the steps that have been taken or will be taken to ensure that the facilities for which LSD is responsible are safe and that there is an Emergency Operations Plan (EOP) in the format prescribed by the Agency of Education, that each building/facility has adopted an appropriate and layered approach to physical security to ensure that the facility is safe and secure; and that all staff are trained in emergency operations, including threat assessment protocols.

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

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

LSD will use current the MAUSD 5-year capital improvement plan for the Lincoln Community School which goes through FY25, a review of relevant maintenance and facility assessment documents, and inspections of the facility and its systems by the LSD Facilities Committee, VSBIT safety/security assessment, and other potential service providers. This process will be completed during LSD's first year of operation allowing LSD to develop an FY25-FY29 Capital Improvement Plan,

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

In the coming months, the Facilities Committee will be develop a Scope of Work/Job Description, including required certifications, and begin the process of identifying and contracting with a service provider to ensure LSD has access to the necessary Facilities Management services and support.

## 6. Food Service & Transportation

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

LSD reached out to MAUSD to discuss continued participation in the MAUSD/ANWSU food cooperative which is managed by MAUSD. LSD has been waiting for information regarding cost but having not received is now considering providing its own food service as it successfully did for many years prior to the creation of MAUSD. Planning for this will begin in the coming weeks.

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

The LSD Transportation Policy ensures transportation for students attending the Lincoln Community School and Mt Abraham Middle/High School (where 90% of Lincoln gr 7-12 students are expected to attend). LCS will not provide transportation for students in grades 7-12 attending other out of district schools due to the extremely low numbers and prohibitive cost. However, depending on the actual circumstances that play out in FY24, LSD may encourage other schools to consider providing transportation for Lincoln students.

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

## 7. Risks & Contingency Planning

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

Risk #1: LSD is unable to recruit and train staff before July 1, 2023 for the Business Manager and/or Superintendent positions.

Resolution: LSD has commitments from its current consultants that they will fill these positions in an "acting" capacity until permanent staff are on board.

Risk #2: Contract negotiations for LCS teacher/administrative staff are not concluded by July 1, 2023.

Resolution: LCS staff will continue to operate under the terms of their current contract with MAUSD.

In the unlikely event LSD is not able to be fully operational by July 1, 2023 it will tuition its students in grades K-6 to out-of-district elementary schools until the SD is fully prepared.