

ANWSD-MAUSD Merger Study Committee Report & Articles of Agreement

June 27, 2022
Revised July 20, 2022



Table of Contents

Committee Charge	4
Committee Members	4
Recommendation	5
Rationale	5
Advantages and Disadvantages	6
Advantages	6
Disadvantages	7
Addison North School District	9
Articles of Agreement	9
Article One: Necessary Districts	9
Article Two: Advisable Districts	9
Article Three: Grades to be Operated	9
Article Four: Cost and Location of Proposed New Schools	9
Article Five: Plan for the First Year of Operation	9
Article Five A: Transportation of Students	9
Article Five B: Assignment of Staff, Collective Bargaining Agreements	10
Article Five C: Contracts	10
Article Five D: Curriculum	10
Article Six: Surpluses, Debts, and Special Funds	11
Article Six A: Debt	11
Article Six B: Surpluses and Deficits	11
Article Six C: Endowments, Special Funds, and Restricted Accounts	11
Article Seven: Property, Valuation, and Payment	11
Article Seven A: Transfer of Real and Personal Property	11
Article Seven B: Disposal of Real Estate	12
Article Eight: Forming Entities Cease to Exist	13
Article Nine: Board of Directors Representation	13
Article Ten: Initial Terms of Office for Board Directors	14
Article Eleven: Date of Vote	16
Article Twelve: Date Operations of the Addison North School District	16
Article Thirteen: Board of Directors Operations During Transition (16 VSA §716)	16
Article Fourteen: Other Matters	16
Article Fourteen A: Votes on the Budget and Other Public Questions	16
Article Fourteen B: Supporting and Protecting Our Schools	16
Elementary Schools:	17
Middle and High Schools:	17
Article Fourteen C: Preference to Operate as a Supervisory District	17
Article Fourteen D: School of Attendance	18
Article Fourteen E: Community Involvement	18

About the Articles of Agreement	19
Background and Context	22
Context	22
About the Study Process	23
Enrollment	24
Community Population & Housing	27
Cost Efficiencies and Tax Rate Projections	28
Opportunities for Learning	31
Transportation	36
Act 46 Outcomes	36
Supervisory District Preferred	37
Community Values	38
Community Feedback on Draft Articles of Agreement	38
A Multi-Year Process	39
Surpluses, Debt, and Special Funds	40
School Facilities, Facilities Needs, and Long-Term Debt	40
Property Values	40
Long-Term Debt, Capital Funds, and Capital Needs	41
ANWSD	41
MAUSD	42
Disposal of Property	43
Other Options Considered	43
ANWSD	43
MAUSD	44
Merger Study Committee	46
Appendices	52

Committee Charge

ANWSD & MAUSD agree to form a study committee (per 16 VSA ss706) to analyze the advisability of forming a union school district. The Committee's work ideally will be completed within a timeframe that will allow a vote on a proposed plan by Town Meeting Day 2022.

The Committee's charge was adopted by both the ANWSD and MAUSD Boards of Directors at a joint meeting on April 26, 2021. To provide clarity for the communities of ANWSD and MAUSD and to allow the Committee to ensure its work is thoughtful and thorough, the Committee formally acted on August 31, 2021, to set November 8, 2022, as the anticipated date for any vote on the formation of a union, if so recommended by the Committee.

Committee Members

The Committee is composed of local people who are passionate about the future of our communities. They are parents, teachers, coaches, neighbors, grandparents, and school board members. They have each volunteered to commit to spending many hours over the course of over a year to carefully examine the details of their charge: to learn about school governance models, listen to what people in the community value, and create a model of what the best merging plan would look like, and recommend whether or not it is a good idea to merge based on the plan and on the current situations in the two districts.

Erica Andrus, Ferrisburgh
Rebecca Coffey, Vergennes
Martha DeGraaf, Panton, Co-Chair
Carole McBride, Addison
Keith Morrill, ANWSD Board, Vergennes
Mary Neffinger, Ferrisburgh
Dustin Corrigan, Bristol
Kevin Hanson, MAUSD Board, Bristol

Brad Johnson, MAUSD Board, Starksboro**
Marikate Kelley, Monkton, Co-Chair
Sarah LaPerle, MAUSD Board, New Haven
Ed McGuire, New Haven
Troy Paradee, Bristol
Stephanie Rossier, Lincoln
Dave Sharpe, MAUSD Board, Bristol*
Liz Sayre, MAUSD Board, Bristol*

*Liz Sayre was appointed beginning May 17, 2022, to replace Dave Sharpe following his resignation from the MAUSD Board and Study Committee.

**Brad Johnson resigned from the Study Committee on June 27, 2022.

The Committee was staffed by Superintendent Patrick Reen, Superintendent Sheila Soule, Administrative Assistant Glory Martin, and Consultant Tracy Wrend.

Recommendation

For more than 11 months, the ANWSD-MAUSD Merger Study Committee met to learn about the current state of the two districts. The Committee heard reports on enrollment trends, financial projections, academic programming, and transportation. The Committee sought community input from many different stakeholders on the goals and priorities and used that feedback to craft articles of agreement for a proposed merger. As a result, the Merger Study Committee recommends a merger of ANWSD and MAUSD into a unified union school district to enhance educational opportunities, provide greater equity for students, and increase financial and educational stability in our region. Our study indicates a merged single organizational structure will provide a more coherent system of teaching and learning PreK-12 with a greater ability to provide better outcomes for learners and cost-efficiency for taxpayers.

Rationale

State-wide and within our districts, school enrollment has been declining, and educational costs continue to rise. To maintain programming at its current state, in the face of this decreasing enrollment at our high school and middle school levels, our school districts are facing predicted 13-15% tax increases through fiscal year 2027. As a result of these significant pressures, educational funding and budgeting will be drastically impacted and our students will be negatively affected by program cuts.

This committee was formed in an effort for the school boards to address these issues with future planning in mind. Through merging and increasing efficiencies, intentional staffing will create fewer negative impacts on both social-emotional and academic programming and meaningful learning opportunities for students. Without the merger, student class sizes would increase beyond an optimal size. Fewer support staff would be available to support students, including those with the greatest academic and social-emotional needs, and educators would have decreased support and less high-quality professional development in a time when districts are still transitioning from Act 46, implementing Act 77's requirements for proficiency-based learning and personal learning plans, and now working to implement Act 173's new requirements for services and funding of those services for our most vulnerable students. This is also at a time when students are returning from remote and hybrid learning due to the pandemic, and data shows students are behind in both social-emotional and academic skills, and the needs of students are heightened. It is more important than ever to have a strong, yet flexible, educational system for our students.

In an effort to address these issues, each school board, individually, faces significant budget cuts that would negatively impact educational opportunities. A merger into a unified union supervisory district will provide an opportunity to reduce overhead, especially the Central Office footprint, maintain or even grow programs, and provide economies of scale to limit per-pupil expenditures. Without a significant increase in taxes, an unmerged future would result in the elimination of more programming, support, and opportunity when compared to a merged future.

The ANWSD-MAUSD Merger Study Committee believes that, if we work together and merge ANWSD and MAUSD into one union, we can:

- Sustain and expand programming for middle and high school students;
- Sustain and protect high-quality education in elementary schools;
- Increase cost-effectiveness and slow tax rate growth; and
- Increase equity, ensuring all students have access to engaging, relevant, and high-quality learning opportunities.

To accomplish these goals, the Unified Union structure will enable the potential for:

- Combined middle and high schools;
- Expanded grade(s) served at the middle level; and
- Cost-effective practices and policies for elementary schools that protect schools and promote collaboration, thoughtful use of resources, and learning opportunities for all students.

Advantages and Disadvantages

The Committee reviewed the pros and cons of merging to form a union school district, including consideration of the projected future as compared to the future in the current structure, and concluded the pros outweigh the cons.

The most significant benefit identified, and a critical factor behind the committee's recommendation is the need to ensure sustainable high-quality learning opportunities for all students, most importantly at the secondary level. The combined 7-12 enrollment in ANWSD and MAUSD is roughly 1050 today and is expected to drop to roughly 800 students by SY31. These enrollment levels are comparable to secondary enrollments in MAUSD alone over a decade ago. In order to offer the programs and choices that communities value and students need, we have to work together. The Committee identified the following advantages and disadvantages as part of forming its recommendation.

Advantages

- ANWSD and MAUSD would be stronger together. A merger is vitally important for opportunities for secondary students.
- Collaboration is the best way to ensure students at the middle and high school levels have needed and valued learning opportunities and extracurricular activities in the future. There are many examples of successful collaboration between ANWSD and MAUSD to build on.
- The opportunities for cost efficiencies are significant and don't reduce options for students. There is more opportunity to contain tax rate increases.
- A union creates a need to change, which is an opportunity. If we can imagine what we can do together and layer in our strengths, we'd have a lot to offer.
- The new district will be better able to achieve right-sized classes.
- School choice within the new district would be available for all students.
- There would be improved coordination of student preparation for middle school and high school.
- Employees would benefit from greater seniority and job security. Teachers and staff

- would feel better supported and have more options to teach things they love.
- The environment for instructional coaches and interventions would be improved.
- Parents are considering sending their students to other schools because of anticipated and already actual loss in programs at the high school level. A union could attract and retain students at the secondary level.
- A union district would have a more efficient and transparent governance structure.
- Small schools can be better supported in a larger system and can avoid inadvertent fast-tracking of school closure.
- Working together as a larger body for more kids as a merger study committee has been very positive and should be our regional goal.
- Equity can be best addressed in a merged district.
- Equity of representation on the board is achieved.
- An expanded peer group is better for students.
- A larger high school that is stronger would be a draw to our communities and would help attract students and families to elementary schools. Town elementary school will not save a town, but a strong high school can. If strong elementary schools would save a town, we wouldn't be here right now.
- The Articles of Agreement include stronger provisions about community involvement than in place currently.
- All citizens and towns that join have a voice and vote in middle and high school education.
- All citizens have a voice and direct vote on central office services such as transportation, special education, and executive administration.
- Forming a new union is an opportunity to begin a new legacy and provide more stability.
- Continued declining enrollment means less state aid and creates a need to change. The regional changes necessary to increase the student population (housing) are not in process in the area and will take a decade or more to have an impact if the communities even accept the kinds of changes needed.
- The process for school closure, if necessary, involves everyone and assures real need for action through super-majorities of Board and district voting. The language on protecting and supporting schools will really do that and all will likely be stronger and more viable in a merged district.
- A merged district could provide more stability, especially if it is a supervisory district.

Disadvantages

- Transportation is important and a specific plan to alleviate people's concerns cannot be articulated by the committee; it is the responsibility of the future board.
- Small changes in school schedules will be needed to ensure bus routes are of the same duration they are now.
- Forming a union does not necessarily directly result in cost efficiencies and lower tax rate increases; decisions need to continue to be made in the future to have the greatest positive impact on student learning opportunities and property tax rates.
- Some towns/districts may not join, and a union would be stronger with all towns together with equal input.
- Starksboro's status is uncertain, adding confusion.
- Change is hard and changes in identity can feel like a loss.
- Some may be worried about possible changes to their student's school of attendance or work site.

- Multi-year planning is needed to ensure buy-in and minimization of issues.
- Community engagement in the merger study process has been largely from uncompromising individuals.
- Citizens and towns may feel like they have less voice and influence in decisions.
- There is a lot of information to consider for decision-making; some may make decisions based on emotions, not the facts.
- Where the high school is situated will be a community focal point for the new district because middle school extracurricular activities do not seem to draw the attention as they do for a high school.
- The current physical structures have some distinct differences, such as Vergennes has two gyms and Mt Abraham has one gym.
- ANWSD has done more hard work to generate efficiencies and equity at the elementary level than MAUSD.
- Community access to middle and high schools may be harder for some, depending on decisions about what middle and high school grades are offered where.
- Cost avoidance may not feel significant.
- Some people feel that more options for collaboration between high schools could be explored.
- If some towns don't join, they won't have a voice in the education of their students at the secondary level.

The greatest advantages can be achieved if the State Board of Education assigns a newly formed union as a supervisory district. If a union is formed, a supervisory district structure is preferred and would allow the district to take full advantage of financial and operational efficiencies. However, deconstruction of a district or assignment to a supervisory union is also a possibility and prevents some of those savings and efficiencies. Assignment to a supervisory union may result in unbalanced representation on decisions related to transportation, special education, and administrative services. It may also eliminate the opportunity to capitalize on cost efficiencies. Additionally, a supervisory union will result in a less transparent governance structure. We strongly feel that a unified school district is the best option for our region.

Addison North School District Articles of Agreement

Article One: Necessary Districts

The towns and school districts of Addison Northwest School District #54 (comprising the towns of Addison, Ferrisburgh, Panton, Vergennes, and Waltham) and Mount Abraham Union School District #61 are necessary for the establishment of the Addison North School District (ANSD) and shall be considered 'Forming Entities'. For purposes of this Agreement, the Mount Abraham Union School District shall be defined as follows:

- A. The towns of Bristol, Monkton, New Haven, and Starksboro if ratification of Starksboro's withdrawal is not approved through a vote by September 12, 2022 and pursuant to 16 V.S.A. sec. 724 and H. 727 of 2022.
- B. The towns of Bristol, Monkton, and New Haven if ratification of Starksboro's withdrawal is approved through a vote by September 12, 2022 pursuant to 16 V.S.A. sec. 724 and H.727 of 2022.

Article Two: Advisable Districts

The Lincoln School District is advisable to join the Addison North School District.

Article Three: Grades to be Operated

The Addison North School District will operate grades pre-kindergarten through twelfth (PK-12) to provide public education to all students in the ANSD. The Addison North School District is committed to providing its students with equitable educational opportunities.

Article Four: Cost and Location of Proposed New Schools

No new school buildings and no major renovations are necessary or proposed for the formation of the Addison North School District. While no renovations or new construction is proposed or contemplated for the purposes of this merger, the board of the ANSD may undertake renovation or construction subject to procedures in law, such as a vote of the electorate on a bond, as applicable.

Article Five: Plan for the First Year of Operation

Article Five A: Transportation of Students

The ANSD will provide for the transportation of students consistent with the contracts, policies, and practices that were in existence during the year immediately preceding the first year of the ANSD's operation.

The ANSD Board will adopt a policy regarding student transportation by July 1, 2023, and as required by 16 VSA §1222, and shall consider routes and ride durations that are comparable to those in place in the year immediately preceding the first year of the ANSD's operation. After the first year, the Board of School Directors of the ANSD shall make all subsequent decisions relative to the operation of the ANSD consistent with state and federal laws and these Articles of Agreement.

Article Five B: Assignment of Staff, Collective Bargaining Agreements

The ANSD Board of Directors will comply with 16 VSA Chapter 53, Subchapter 3, regarding the recognition of the representatives of employees of the respective Forming Entities and representatives of any Advisable Districts which determine to join the ANSD as the representatives of the employees of the ANSD and will commence negotiations pursuant to 16 VSA Chapter 57 for teachers and 21 VSA Chapter 22 for other employees covered under the terms of a collective bargaining agreement. In the absence of new collective bargaining agreements on July 1, 2023, the ANSD Board will comply with the pre-existing master agreements pursuant to 16 VSA Chapter 53, Subchapter 3.

The ANSD Board shall honor all individual employment contracts that are in place for the Forming Entities and any Advisable Districts on July 1, 2023, until their respective termination dates.

In the first year of operation of the ANSD, all staff will be assigned to the site(s) and assignments that they would have been assigned to in the prior academic year, provided, however, that the ANSD and the employee Association may agree to modifications or reassignment based on individual staff and school district circumstances and needs.

After the first year of operation, the Board of School Directors of the ANSD shall make all subsequent decisions regarding the assignment of employees relative to the operation of the ANSD consistent with state and federal laws, collectively bargained agreements, and these Articles of Agreement.

Article Five C: Contracts

For those employees not currently covered by a collective bargaining agreement, the ANSD Board shall honor all contracts that are in place for the Forming Entities on July 1, 2023. The Board of School Directors of the ANSD shall make all subsequent decisions relative to the operation of the ANSD consistent with state and federal laws and these Articles of Agreement.

Article Five D: Curriculum

For at least the first year of operations of the ANSD, the ANSD School Board shall use the standardized curricula, education programs, student services, and graduation requirements that were in place in each Forming Entity prior to merging. The curricula, student programs, and student services will meet or exceed all Vermont and federal legal and policy requirements.

In the transition period and first year of operation, the ANSD Board will adopt relevant policy and initiate a process for establishing a common multi-year curricular framework, including transition plans for graduation requirements that are responsive to the expectations and learning opportunities available to high school students during the period of curricular transition.

After the first year, the Board of School Directors of the ANSD shall make all subsequent decisions relative to the operation of the ANSD consistent with state and federal laws and these Articles of Agreement.

Article Six: Surpluses, Debts, and Special Funds

Article Six A: Debt

The ANSD shall assume all capital debt of the forming districts including both principal and interest, as may exist at the close of business on the day immediately preceding the operational date. No new debt shall be acquired by the ANSD or the Forming Entities or any Advisable District during the transition period identified in Article Thirteen except under circumstances and as provided by law.

Article Six B: Surpluses and Deficits

The ANSD shall assume any and all general operating surpluses and deficits of the forming districts that may exist as if the close of business on the day immediately preceding the operational date. In addition, reserve funds identified for specific purposes will be transferred to the ANSD and will be used for said purpose unless otherwise determined through an appropriate legal process.

Article Six C: Endowments, Special Funds, and Restricted Accounts

The forming districts and any Advisable Districts will transfer to the ANSD any pre-existing school district-specific endowments, restricted accounts, or special funds that may exist as of the day immediately preceding the operational date. Scholarship funds or like accounts held by forming districts that have specified conditions of use will be used by the ANSD in accordance with said provisions unless otherwise determined through an appropriate legal process.

Article Seven: Property, Valuation, and Payment

Article Seven A: Transfer of Real and Personal Property

No later than July 1, 2023, the Forming Districts and any Advisable Districts will convey to the Addison North School District, for the sum of one dollar, and subject to all encumbrances of record, all of the real estate and personal property owned by them including all land, buildings, and contents.

Article Seven B: Disposal of Real Estate

No property shall be transferred or otherwise disposed of by the ANSD during the transition period identified in Article Thirteen except under circumstances and as provided by law.

In the event that, and at such subsequent time as, the Addison North School District determines that any of the real property, including buildings and land previously owned by Addison School District #001, Ferrisburgh School District #076, Bristol School District #031, Lincoln School District #112, Monkton School District #127, New Haven School District #138, or Starksboro School District #196 conveyed to it by forming districts is or are unnecessary to the continued operation of the ANSD and its educational programs, the ANSD shall convey such real property, for the sum of one dollar, and subject to all encumbrances of record, to the municipality in which it is located.

In the event the towns of Bristol, Lincoln, Monkton, New Haven, and Starksboro elect not to acquire ownership of such real property, the ANSD pursuant to Vermont statutes, shall sell the property upon such terms and conditions as established by the board of the ANSD.

In the event property that was once owned by the Vergennes Union Elementary School District #44 is abandoned or no longer used for public education purposes, such property shall be conveyed to the City of Vergennes, the Town of Panton, and the Town of Waltham, in conformance with the terms of the Agreement dated June 20, 1989, by and between Vergennes Union Elementary School District #44, Vergennes Graded School District, Waltham School District, and Panton School District, which Agreement is Incorporated by reference into these Articles and is Attached hereto as an appendixVUHS document. In the event Vergennes, Waltham, and Panton elect not to acquire ownership of such real property, the ANSD pursuant to Vermont statutes, shall sell the property upon such terms and conditions as established by the board of the ANSD.

In the event that, and at such subsequent time as, the ANSD determines that any of the real property, including land and buildings, once owned by the Mount Abraham Union/Middle High School District #28 and/or Vergennes Union High School District #5 is or are unnecessary to the continued operation of the ANSD and its educational programs, the ANSD shall, pursuant to Vermont statutes, sell the property upon such terms and conditions as established by the board of the ANSD.

The conveyance of any real property to the Town/City in which it is located shall be conditioned upon the Town/City owning and utilizing the real property for community and public purposes for a minimum of five (5) years. In the event a Town/City elects to sell the real property prior to five (5) years of ownership, the Town/City shall compensate the ANSD for all capital improvements and renovations completed after the formation of the ANSD and before the sale to the Town/City.

The conveyance of such real estate is subject to all encumbrances of record, the assumption of payment of all outstanding bonds and notes, and repayment of any school construction aid and or grants as required by Vermont law.

The sale of any school properties by the ANSD shall be consistent with any applicable provisions of state law.

Article Eight: Forming Entities Cease to Exist

On July 1, 2023, when the ANSD becomes fully operational and begins to provide educational services to students, the Forming Districts and any Advisable District shall cease all educational operations and shall remain in existence for the sole purpose of completing any outstanding business not given to the ANSD under these articles and state law. Such business shall be completed as soon as practicable, but in no event any later than December 31, 2023. The Forming and any Advisable Districts shall cease to exist when all outstanding business is completed or on December 31, 2023, whichever occurs first.

Article Nine: Board of Directors Representation

The ANSD Board of Directors shall be composed of fifteen (15) individuals elected by Australian ballot by the voters of the municipalities in which they reside. Each municipality within the ANSD shall be guaranteed at least one resident representative. The number of representatives in excess of one derived from each municipality shall be determined on the basis of relative population within the ANSD. Votes shall be weighted as necessary to achieve more precise proportionality. The weighted vote reflects proportionality and is based on the results of the 2020 census. Board composition and weighting will be recalculated promptly following the release of each decennial census by the ANSD Board.

The initial number of school board members and weight of votes by Town will be as follows if Lincoln and Starksboro ARE members of the ANSD:

Town	Population	Board Member(s)	Individual Vote Weight Value	Total Vote Weight Value
Addison	1365	1	7.47	7.47
Bristol	3782	3	6.90	20.69
Ferrisburgh	2646	2	7.24	14.48
Lincoln	1323	1	7.24	7.24
Monkton	2079	2	5.69	11.37
New Haven	1683	1	9.21	9.21
Panton	646	1	3.53	3.53
Starksboro	1756	1	9.61	9.61
Vergennes	2553	2	6.98	13.97
Waltham	446	1	2.44	2.44

The initial number of school board members and weight of votes by Town will be as follows if Lincoln IS NOT a member of the ANSD but Starksboro IS a member of the ANSD:

Town	Population	Board Member(s)	Individual Vote Weight Value	Total Vote Weight Value
Addison	1365	1	8.05	8.05
Bristol	3782	3	7.43	22.30
Ferrisburgh	2646	2	7.80	15.61
Monkton	2079	2	6.13	12.26
New Haven	1683	1	9.93	9.93
Panton	646	1	3.81	3.81
Starksboro	1756	2	5.18	10.36
Vergennes	2553	2	7.53	15.06
Waltham	446	1	2.63	2.63

The candidates for the initial ANSD Board of Directors will be elected by Australian ballot on the date set out in Article Eleven for presentation of these Articles to voters of each school district pursuant to the provisions of 16 V.S.A. § 706j(b). Nominations for the office of ANSD school director representing any town shall be made by filing, with the clerk of that town proposed as a member of the School District, a statement of nomination signed by at least 30 voters in that district or one percent of the legal voters in the district, whichever is less, and accepted in writing by the nominee. A statement shall be filed not fewer than 30 nor more than 40 days prior to the date of the vote.

Pursuant to the provisions of 16 VSA § 706(j)(b), elected school directors shall be sworn in and assume the duties of office. The ANSD Board of School Directors will be elected for three-year terms that commence at the date of the ANSD’s annual meeting, except those initially elected at the time of the formation of the Unified District.

The ANSD Board of Directors shall adjust board membership when necessary to conform to each new decennial census and upon change in membership upon the addition or withdrawal of any member town in/from the ANSD. Such adjustment shall be made without presentation of the amendment of Article 9 to the voters for approval.

Article Ten: Initial Terms of Office for Board Directors

Initial terms of office for the ANSD’s Board of Directors will commence at the time of the first organizational meeting of the district and will include the period of time from the organization meeting to the first annual meeting (March 2024), plus a term of one (1), two (2), or three (3) years.

In the initial election, if Lincoln IS a member of the ANSD, board member terms will be as follows:

Town	1-Year Term Expiring: March 2024	2-Year Term Expiring: March 2025	3-Year Term Expiring: March 2026
Addison		1	
Bristol	1	1	1
Ferrisburgh	1		1
Lincoln	1		
Monkton	1		1
New Haven		1	
Panton		1	
Starksboro			1
Vergennes	1	1	
Waltham			1

In the initial election, if Lincoln IS NOT a member of the ANSD and Starksboro IS a member of the ANSD, board member terms will be as follows:

Town	1-Year Term Expiring: March 2024	2-Year Term Expiring: March 2025	3-Year Term Expiring: March 2026
Addison		1	
Bristol	1	1	1
Ferrisburgh	1		1
Monkton	1		1
New Haven		1	
Panton		1	
Starksboro	1		1
Vergennes	1	1	
Waltham			1

Article Eleven: Date of Vote

These Articles of Agreement proposals to form the ANSD will be presented to the voters of each Forming District identified in Article One and any Advisable District/Town identified in Article Two which chooses to hold a vote on November 8, 2022.

Article Twelve: Date Operations of the Addison North School District

If approved by the voters of the Necessary Districts identified in Article One and pursuant to the provisions of State law and these Articles, the ANSD will commence full educational operations on July 1, 2023 (operational date).

Article Thirteen: Board of Directors Operations During Transition (16 VSA §716)

Upon affirmative votes of the electorates of the town school districts that are necessary, and any advisory school districts that votes to join the ANSD, and upon compliance with 16 V.S.A., Section 706g, the ANSD shall have and exercise all of the authority that is necessary in order for it to prepare for full operation beginning on July 1, 2023. During the transitional period (Nov. 8, 2022- June 30, 2023) the ANSD board shall develop school district policies, negotiate collective bargaining agreements, prepare, present, and warn a budget vote for Fiscal Year 2024, prepare for the annual and any special meetings of the ANSD which may occur during this period, and transact any lawful business coming before the board. The exercise of such authority by the ANSD Board shall not be construed to limit or alter the authority and/or responsibilities of ANWSD and MAUSD that will remain in existence during the transition period for the purpose of completing any business not given to the ANSD School Board. The Forming Districts and any Advisable Districts shall remain responsible for the education of their respective resident students through June 30, 2023.

No new debt shall be acquired and no property shall be transferred or otherwise disposed of by the ANSD during the transition period except under circumstances and as provided by law.

Article Fourteen: Other Matters

Article Fourteen A: Votes on the Budget and Other Public Questions

The ANSD shall propose annual budgets in accordance with 16 VSA Chapter 11. The vote and the annual budget and public questions shall be conducted by Australian ballot pursuant to 17 VSA Chapter 5513(b). Ballots will be delivered to the ANSD Clerk and commingled for counting.

Article Fourteen B: Supporting and Protecting Our Schools

It is the intent of the ANWSD/MAUSD Merger Study Committee that the ANSD supports our schools and values strong connections between schools, communities, families, and students. An important goal for the formation of the ANSD is to enable and enhance the capacity to sustain and grow equitable opportunities for all students.

Elementary Schools:

It is the intent of the ANWSD/MAUSD Merger Study Committee to enable and encourage the Board of Directors of the ANSD to enact policies at the elementary level that promote collaboration, thoughtful use of resources, and opportunities for all students to preserve and strengthen elementary schools.

To protect elementary schools, an elementary school within the ANSD cannot be closed for all grades K-5 without a vote of the electorate as follows:

1. At any time during the first four (4) years of the ANSD's operation, an elementary school for all grades may be closed with a majority of the vote of the towns whose resident students attended that school as of the operational date of the ANSD. For a school with students from more than one town, the vote will be commingled.
2. After the first four (4) years of operations, an elementary school may be closed with:
 - a. Approval of two-thirds (2/3) majority of a quorum of the Board of Directors of the ANSD; and,
 - b. Approval of a two-thirds (2/3) majority of the vote of the ANSD. Per Article 14A and 16 VSA §742, the vote will be a commingled count of all of the towns of ANSD.
3. An elementary school will not otherwise be closed.
4. For the purposes of this section, school closure shall be defined as the District ceases to use the school building for the provision of direct education for a majority of grades

operated within the building in the year prior to the first date of operations. It is the intent of the ANWSD/MAUSD Merger Study Committee to enable the Board of Directors of the ANSD, with input from faculty, staff, the administration, students, families, and the ANSD Community, to operate school(s) at the middle and high school level that will maximize educational opportunities for all.

Article Fourteen C: Preference to Operate as a Supervisory District

With respect and appreciation for the important role and responsibility of the Vermont State Board of Education for the organization and adjustment of supervisory unions to afford increased efficiency or greater convenience and economy, and to facilitate prekindergarten through grade 12 curriculum planning and coordination, it is requested that the ANSD be designated a supervisory district. Administrative efficiencies are an important and significant benefit of the formation of the ANSD, and these can be best realized in a supervisory district structure.

Article Fourteen D: School of Attendance

In the 2023-2024 academic year, each student in the grades for which the ANSD operates multiple school buildings will attend the school that a student residing in that town would have attended in the academic year 2022-2023; provided, however, that the ANSD Board may grant

a parent's or guardian's request for student enrollment in a different school operated by the ANSD based on individual student circumstances and the Superintendent's determination of the school's capacity to serve the child by following ANWSD's policy on school choice within the ANSD for students in all grades, K-12 for the first year of operations. High school students participating in school choice within the district shall be required to meet the graduation requirements for the school they attend. After the first year, the Board of School Directors of the ANSD shall make all subsequent decisions relative to the operation of the ANSD consistent with state and federal laws and these Articles of Agreement. Each student who received ANSD Board approval to attend a different school within the ANSD shall be assured the opportunity for enrollment in that school until they complete all grades offered at their school of choice and as long as the student continues to reside in the ANSD.

Article Fourteen E: Community Involvement

Community connections to local schools are celebrated and cherished. Each community feels that schools are important to the community and all value and support equitable and quality public education for their children. The ANSD Board shall provide timely and sufficient opportunity for local input on policy and budget development. Structures to support and encourage public participation within the ANSD will be established by the ANSD Board of School Directors on or before July 1, 2023.

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

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

About the Articles of Agreement

The Articles of Agreement for a union school district are like a contract or charter. They create the framework for the governance of a union school district. There are thirteen elements that must be addressed in the Articles of Agreement and “other” items may be included as well. The Articles of Agreement must comply with the law and should seek a balance between clarity and certainty about how a new district will be operated and the powers granted to a school board for the ongoing oversight of the school district in an evolving future.

Once approved by voters with the formation of a new union school district, Articles of Agreement can be changed with voter approval or by a school board, as provided in law, 16 VSA § 722. Only the voters may amend a specific condition of an agreement in the district’s articles of the agreement if the condition was included in the warning of the vote to establish the union. The union school district board may amend a condition or agreement in the district’s agreement if it was not included in the warning of the vote to establish the union, however, the board may adjust the number of board members and weights without voter approval if there is a change in the number of towns represented on the board. The district voters may not change the number of grades operated, and begin paying tuition to those grades, without the approval of the Vermont State Board of Education.

Because Articles of Agreement often require boilerplate and legal language, the Committee provided an overview of the articles for community feedback. The overview explained the articles as follows:

- Articles 1 and 2 - Articles merge ANWSD and MAUSD. ANWSD and MAUSD are necessary and voters in each district, in a commingled district-wide vote, must approve the merger. Lincoln can be an advisory district, and vote to join, or not, independent of the decision of ANWSD and MAUSD.
- Article 3 says the new district will continue to operate schools for grades PK-12.
- Article 4 says no new school buildings and no major renovations are necessary or proposed for the merger.
- Article 5A, Transportation:
 - Will be the same as the year before the first year of operation of the new district.
 - Future policy must consider routes and ride durations comparable to the year before the union. If middle and high schools are merged, the “shuttle” option can accomplish this.
- Articles 5B & C, Assignment of Staff, Collective Bargaining Agreements (CBAs), Contracts:
 - Staff will be assigned to the school they would have been assigned the year before the first year of operation of the new district, unless they agree otherwise.
 - Collective Bargaining Agreements and individual contracts will be honored pending new agreements.
 - All other contracts will be honored until their termination.
- Article 5D, Curriculum:

- Graduation requirements will be the same as what is in place for the year prior to the union, and will change through a thoughtful, multi-year process for alignment.
- The new board must develop a multi-year curriculum development process that includes transition plans for graduation requirements.
- Article 14D, School of Attendance
 - For the first year of operation, students will attend the school they would have in the year before the first year of operation of the new district.
 - Within-district school choice:
 - Is available to all if school capacity allows.
 - High school students who choose a different high school must meet the new school's graduation requirements.
 - Students can complete all grades offered at their school of choice as long as they remain residents of the district.
 - This Article will be included in the warned vote and cannot be changed without a vote of the electorate.
- Articles 6A, B & C says that all surpluses, funds, debt, and property are transferred to the new district. Funds must be used for their original purposes
- Article 7B indicates that, if there is ever a need to dispose of school property:
 - Addison, Ferrisburgh, Bristol, Lincoln (if they join), Monkton, New Haven, Starksboro (if they remain) will be returned to the town for \$1 and all encumbrances of record and must be for community/public use for a minimum of 5 years.
 - VUES will be returned to Vergennes, Pantton, and Waltham per the agreement of 1988.
 - MAUHS and VUHS will be sold per the process required in statute.
- Article 14B ensures that all schools will be protected and supported:
 - Elementary schools will not be closed without a yes vote by the electorate of the town(s) the school serves today for the first 4 years.
 - After 4 years, elementary schools will not be closed without a $\frac{2}{3}$ majority vote of the school board, and a $\frac{2}{3}$ majority vote of the electorate of the new district.
 - The Articles allow for middle and high schools to combine to provide more student opportunities. The new school board would lead the process with input from all stakeholders.
 - The Articles provide the time to create cost efficiencies and adapt programming (curriculum & instruction) to improve opportunities for students and support strong schools.
 - The Articles provide time for a town to decide to withdraw before school closure, in the unlikely event it is deemed necessary
- Articles 9 & 10 address the School Board
 - 15 member board
 - 1 member for each town and additional members based on population
 - Weighted voting to ensure proportionality
 - Terms will be for 3 years.
 - To ensure $\frac{1}{3}$ of seats turn over in any given year, the initial terms of board members will be 1, 2, and 3 years (plus the months between their election and the first annual meeting).

- Article 8 says that forming entities (ANWSD and MAUSD) continue to operate until the new union begins operations, then cease to exist.
- Article 11 sets the date of a vote for November 8, 2022.
- Article 12 sets the date for the new district to begin operations for July 1, 2023.
- Article 13 provides for the Board for the new school district to begin work to prepare for operations after the vote, but the new board does not take over operations of schools until July 1, 2023.
- Article 14A clarifies that votes on the budget and other public questions are by Australian ballot and commingled for counting.
- Article 14B tells the Vermont State Board the efficiencies and benefits of a supervisory district are preferred.
- Article 14E requires the new board to consider strategies for community involvement at the school level, and to seek local input on matters such as budget and policy.

Background and Context

Context

On April 26, 2021, the Boards of ANWSD and MAUSD discussed current realities that served as the basis for forming a study committee regarding the advisability of forming a union between the two districts.

At that time, K-12 enrollment in MAUSD had declined 8% (-8%) from FY17 to FY21 (from 1,434 to 1,320) and is projected to continue to decline another 11% (-11%) through FY26 to 1,180. At the same time, MAUSD estimated the need for an 18% increase in budget to maintain the current level of programming. Education spending per pupil, the basis for homestead property tax rates, is \$18,6434.84 and increases in spending along with declines in enrollment are likely to cross the excess spending threshold and incur penalties that further increase local homestead tax rates. It was estimated that 66 staff reductions from MAUSD's current 267, or 25% of staff would be needed to stay below the excess spending threshold. (The excess spending threshold has been suspended with recent changes to the education funding formula, however, the impact of increases in spending per pupil will still have significant impacts on property tax rates.)

Similarly, in ANWSD, K-12 enrollment had declined 9%(-9%) from 914 in FY17 to 829 in FY21. Enrollment was projected to decline another 95 (-9%) through FY26 to 755. ANWSD estimated that a 19% increase in the budget would be needed to maintain current programs through FY26. ANWSD estimates the need to reduce approximately \$5M from the next four 4 budgets to avoid double-digit tax increases. That equates to 40 fewer positions by the year 2026; a 21% decrease in staff from the current staff level.

With a merger, it was estimated we could reduce spending by 5 million dollars annually when compared with the non-merged, level program budget. This enables us to sustain or even increase programs for students while eliminating approximately 42 positions, including 11 central office positions. While still a difficult budgetary consideration, this merger limits the number of positions that will need to be reduced compared to each individual district's projections.

Context Setting: Current Realities

MAUSD

First Year of Act 46 Unification 2018-19

FY17 Enrollment = 1,434

Current Enrollment K-12 = 1,320 (-8%)

FY26 Projected Enrollment = 1,180 (-11%)

FY 22 Expenditure Budget \$31,753,310
EP \$18,643.84

FY26 Projected Level Program Budget
\$37,519,765 (18% increase)

Staff reductions to stay at spending threshold = app.
66 (25%) we currently employ 267 across all categories

ANWSD

First Year of ACT 46 Unification 2017-18

FY17 Enrollment = 914

Current Enrollment K-12 = 829 (-9%)

FY26 Projected Enrollment K-12 = 755 (-9%)

FY22 Expenditure Budget \$21,604,213
EP \$19,175.56

FY26 Projected Level Program Budget
\$ 26,836,300* (19% increase)

Staff/positions to level fund = approx 40 (21%)
we currently employ 190 across all employee categories

Joint MAUSD/ANWSD Board Meeting - April 26, 2021

Collaboration between ANWSD and MAUSD had already demonstrated some successes including a food service collaborative, athletics teams including football, ice hockey, lacrosse, and field hockey, an alternative education program for students in grades 6-12, and for a Pre-K Coordinator.

Concerns regarding the likely future loss of programs for students along with increasing property tax rates projected for both ANWSD and MAUSD were key considerations behind the initiation of a merger study.

About the Study Process

The ANWSD-MAUSD Merger Study Committee was formed by the ANWSD and MAUSD School Boards at a joint meeting on April 26, 2021. The Committee met regularly beginning in July 2021 and worked to ensure a transparent and thoughtful study process that honored the Committee's charge and the responsibilities of a study committee in law (16 VSA §70 & 709). The Committee studied major factors influencing the future of schools in the region, like transportation, enrollment trends, the regional housing shortage, the pupil weighting study that might impact tax rates, school facilities, budget and tax rate projections, and other options that have been explored by ANWSD and MAUSD. The Committee also explored the governance options available between and among ANWSD and MAUSD. The Committee worked to model the best possible union structure it could design, then compared the projected future in a union to the projected future in the current structure of two districts. The process included two community outreach efforts. In the fall of 2021, the Committee held a virtual community forum and explored community and Committee values and priorities. In the spring of 2022, the

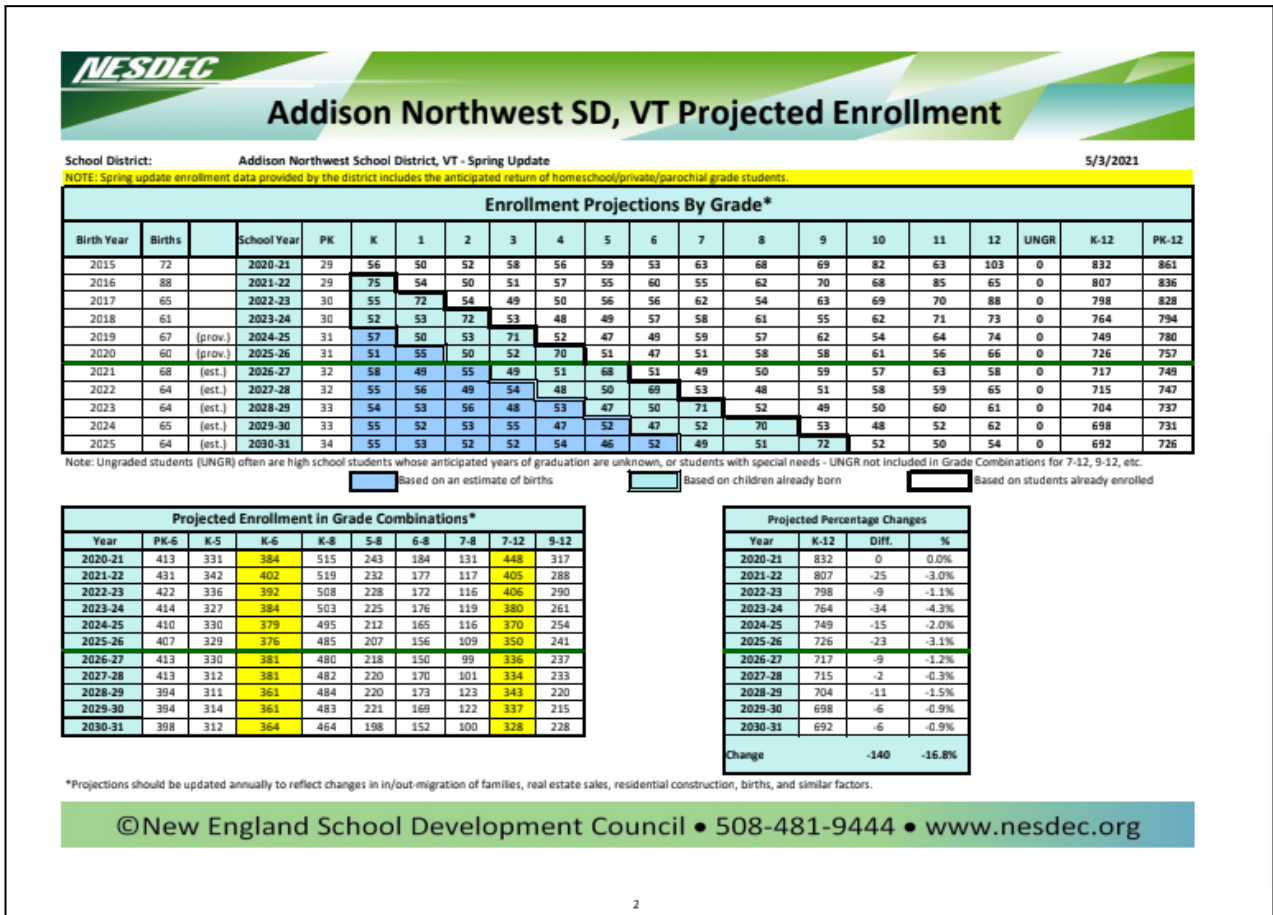
Committee sought feedback on the draft Articles of Agreement for a possible union of ANWSD and MAUSD through a combination of in-person and online tools.

The Committee worked to keep the public informed in partnership with ANWSD and MAUSD by maintaining dedicated website pages and providing regular updates regarding the Committee’s work. See the appendices which include meeting briefs that were shared with the community after each meeting and describe the Committee’s ongoing work.

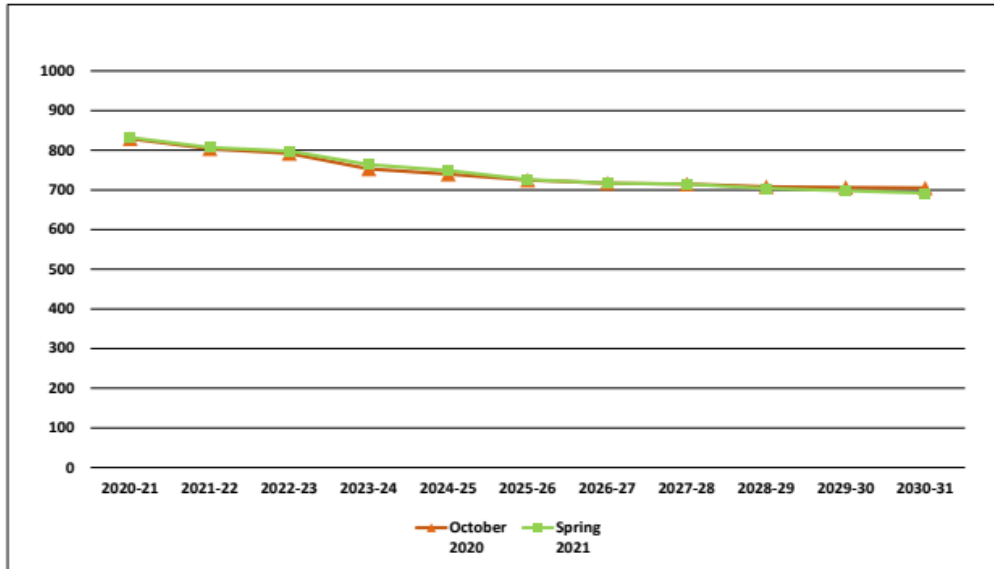
Enrollment

Enrollment in both ANWSD and MAUSD has been declining and is expected to continue to decline for all grades K-12, however, the sharpest declines are expected in the middle and high school grades. The New England School Development Council, NESDEC, provides enrollment projections annually to school districts throughout the region.

ANWSD’s combined total enrollment across all grades is dropping. From SY21-SY31, there is a projected decline of 140 students total, a decrease of 16.8% (-16.8%). Enrollment is forecasted to drop the most at the middle and high school levels. SY21-SY31 enrollment is expected to drop by 120 students in grades 7-12, or 26.8% (-26.8%). This accounts for 86% of the projected enrollment change between SY21 and SY31. In the elementary grades, K-6, enrollment is projected to drop by 20 students, for a percentage decrease of 5.2% (-5.2%).



NESDEC
K-12 Projections to 2030 Based on October 2020 vs. Spring 2021 Data



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Addison Northwest School District 2020-2021 Enrollment Projection, May 2021

MAUSD’s combined total enrollment across all grades is dropping. From SY21-SY31, there is a projected decline of 181 students total, a decrease of 13.9% (-13.9%). Enrollment is forecasted to drop the most at the middle and high school levels. SY21-SY31 enrollment is expected to drop by 152 students in grades 7-12, or 23.6% (-23.6%). This accounts for 84% of the projected enrollment change between SY21 and SY31. In the elementary grades, K-6, enrollment is projected to drop by 29 students, for a percentage decrease of 4.4% (-4.4%).



Mt. Abraham USD, VT Projected Enrollment

School District: Mt. Abraham USD, VT

10/15/2020

Enrollment Projections By Grade*																				
Birth Year	Births		School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2015	83		2020-21	136	89	83	91	87	99	102	104	107	113	98	117	124	84	0	1298	1434
2016	94		2021-22	137	86	90	79	94	84	98	102	98	108	115	101	115	121	0	1291	1428
2017	103		2022-23	138	94	87	86	81	91	83	98	96	98	110	118	99	112	0	1253	1391
2018	110	(prov.)	2023-24	139	100	95	83	88	78	90	83	92	96	100	113	116	97	0	1231	1370
2019	98	(est.)	2024-25	140	90	101	91	85	85	77	90	78	92	98	103	111	113	0	1214	1354
2020	98	(est.)	2025-26	141	89	91	97	94	82	84	77	84	78	94	101	101	108	0	1180	1321
2021	101	(est.)	2026-27	142	92	90	87	100	91	81	84	72	84	79	97	99	99	0	1155	1297
2022	102	(est.)	2027-28	143	93	93	86	90	97	90	81	79	72	85	81	96	97	0	1140	1283
2023	102	(est.)	2028-29	144	93	94	89	88	87	96	90	76	79	73	87	80	94	0	1126	1270
2024	100	(est.)	2029-30	145	91	94	90	92	85	86	96	84	76	80	75	86	78	0	1113	1258
2025	100	(est.)	2030-31	146	92	92	90	93	89	84	86	90	84	77	82	74	84	0	1117	1263

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.

Based on an estimate of births

Based on children already born

Based on students already enrolled

Projected Enrollment in Grade Combinations*									
Year	K-4	PK-6	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2020-21	449	791	655	875	426	324	220	643	423
2021-22	433	770	633	839	406	308	206	658	452
2022-23	439	758	620	814	375	292	194	637	439
2023-24	444	756	617	805	361	271	188	614	426
2024-25	452	759	619	789	337	260	170	595	425
2025-26	453	755	614	776	323	239	162	566	404
2026-27	460	767	625	781	321	240	156	530	374
2027-28	459	773	630	781	322	232	151	510	359
2028-29	451	781	637	792	341	245	155	489	334
2029-30	452	779	634	794	342	256	160	479	319
2030-31	456	772	626	800	344	260	174	491	317

Projected Percentage Changes			
Year	K-12	Diff.	%
2020-21	1298	0	0.0%
2021-22	1291	-7	-0.5%
2022-23	1253	-38	-2.9%
2023-24	1231	-22	-1.8%
2024-25	1214	-17	-1.4%
2025-26	1180	-34	-2.8%
2026-27	1155	-25	-2.1%
2027-28	1140	-15	-1.3%
2028-29	1126	-14	-1.2%
2029-30	1113	-13	-1.2%
2030-31	1117	4	0.4%
Change	-181	-13.9%	

*Projections should be updated annually to reflect changes in in/out-migration of families, real estate sales, residential construction, births, and similar factors.

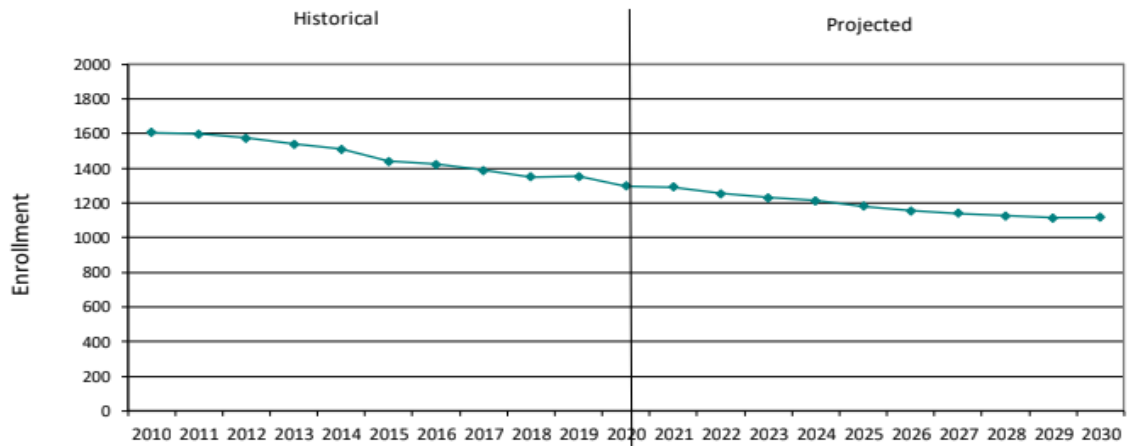
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Mount Abraham Unified School District, Facility Best Use Study, August 10, 2020, Updated November 2020



Mt. Abraham USD, VT Historical & Projected Enrollment

K-12, 2010-2030



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Mount Abraham Unified School District, Facility Best Use Study, August 10, 2020, Updated November 2020

It is important to note that enrollments change daily in schools. Therefore, enrollment count data may vary slightly by source and depending on the date and methodology used for the count. The Vermont Agency of Education uses a variety of methods for counting pupils, including enrollment, Average Daily Membership (ADM), and Equalized Pupil counts, for example.

For planning purposes, the Committee used the following equalized pupil count calculations:

	Equalized pupils, Fall 2021	Percentage
ANWSD	943.93	39.17%
MAUSD	1465.71	60.83%
Total	2409.64	100.00%

As of 1/3/21, Equalized Pupil Count for Lincoln for the above counts is 198.38.

Community Population & Housing

The ANWSD-MAUSD Merger Study Committee sought to understand community housing and population to explore the likelihood that enrollments might improve. The Committee learned that the total population in the region is stagnating, including children, and cannot expand until housing needs are addressed. There is a shortage of suitable housing for smaller households in the region. Much of the current housing stock was built for larger families and extended families and is inefficient and expensive to maintain. The shortage of smaller dwellings for smaller households was exacerbated by COVID-19-related in-migration, resulting in fewer available homes and higher prices. Housing supply costs and the availability of skilled labor along with infrastructure needs such as for wastewater and zoning combine to suggest that it will take a decade or more for trends in housing, total population, and school enrollment to change.

See the appendices for more information on the Committee’s study of population and housing considerations.

For the purposes of considering board representation, the Committee considered 2020 Census data from the Vermont Center for Geographic Data

(<https://vcgi.vermont.gov/data-release/2020-census-data>)

Town	2000	2010	2020	2020 %
Addison	1393	1371	1365	
Ferrisburgh	2657	2775	2646	
Panton	682	677	646	
Vergennes	2741	2588	2553	
Waltham	479	486	446	
ANWSD TOTAL	7952	7897	7656	41.88%

Bristol	3788	3894	3782	
Lincoln	1214	1271	1323	
Monkton	1759	1980	2079	
New Haven	1666	1727	1683	
Starksboro	1898	1777	1756	
MAUSD TOTAL	10325	10649	10623	58.12%
TOTAL			18279	

Cost Efficiencies and Tax Rate Projections

Tax rates were projected in the fall 2021 and compare projected tax rates if the status quo is continued and with a merged district (supervisory district). ANWSD and MAUSD projections on the impacts of changes to the education funding system enacted by the legislature in the spring of 2022 suggest that the changes will be unlikely to help either district and may hurt, especially in the long term when temporary caps on tax rate increases expire.

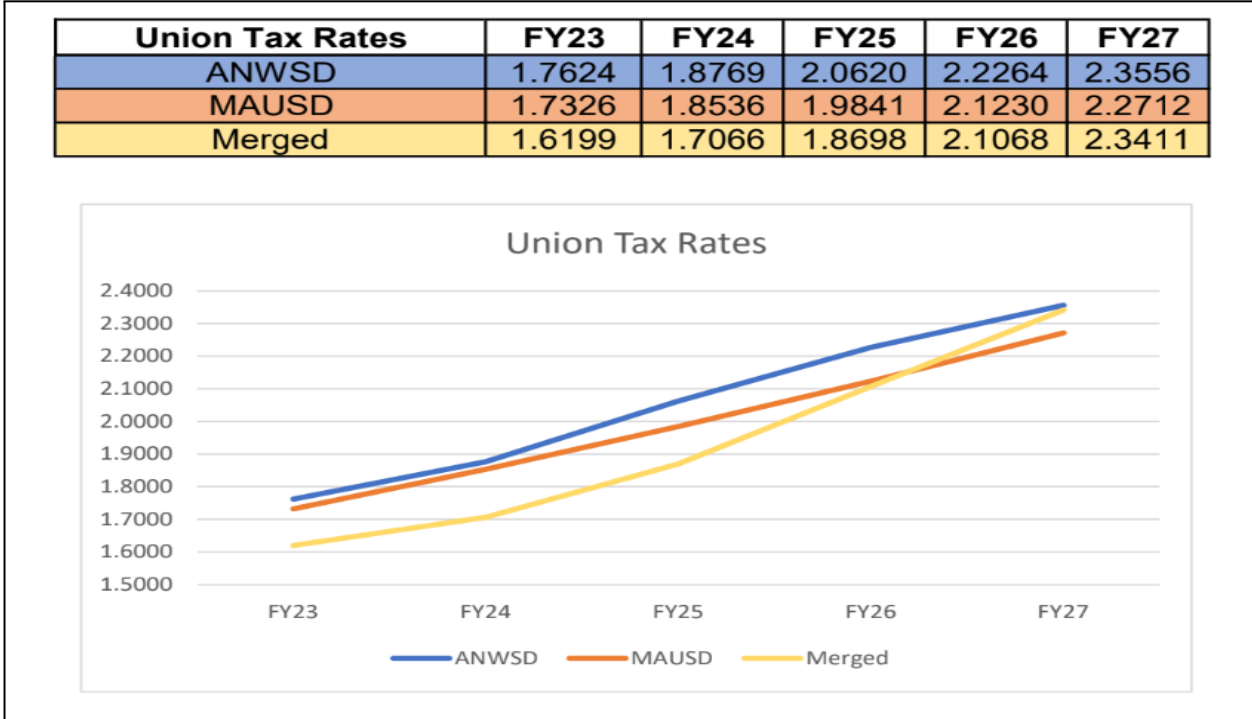
Property tax rates are projected to increase 13.5-15% from FY22 to FY27 with the impact of the excess spending penalty. Projections assume NO changes in programming. Projections do include ANWSD and MAUSD estimates of savings from administrative efficiencies. These projected savings vary as compared to the estimated savings projected in MAUSD's *Evaluation of Options to Address Declining Enrollment While Improving & Expanding Services to Students Report* by K-12 Solutions (which projected \$1.3 Million Dollars in savings); however, there is agreement that there are significant savings to be leveraged through full implementation of a merged Central Office. The tax rates below illustrate the potential impact of such savings on property tax rates.

Merger Study MAUSD/ANWSD Budget Tax Calculation Worksheet	ANWSD FY22 Approved	MAUSD FY22 Approved	Merged District FY23 Estimated	Merged District FY24 Estimated	Merged District FY25 Estimated	Merged District FY26 Estimated	Merged District FY27 Estimated
Expenditure Budget	\$21,604,213	\$31,753,310	\$50,697,494	\$52,695,342	\$54,908,612	\$57,223,064	\$59,644,919
Minus Local Revenue (Not including On-Behalf Tech Center)	\$3,237,829	\$4,060,616	\$7,213,163	\$7,229,368	\$7,245,655	\$7,262,022	\$7,278,472
Plus/(Minus) Surplus Funds to Apply as Local Revenue	\$266,000	\$366,229	\$0	\$0	\$0	\$0	\$0
Equals Balance to Fund with Education Funds	\$18,100,384	\$27,326,465	\$43,484,331	\$45,465,974	\$47,662,958	\$49,961,041	\$52,366,447
Equalized Pupils	943.93	1465.71	2360.26	2330.68	2278.45	2234.13	2199.74
Equalized Spending Per Pupil	\$19,176	\$18,644	\$18,424	\$19,508	\$20,919	\$22,363	\$23,806
Projected Threshold for Equalized Pupil Spending	\$18,789	\$18,789	\$18,883	\$18,977	\$19,072	\$19,168	\$19,263
Amount (Below) or Above Threshold	\$387	(\$145)	(\$459)	\$530	\$1,847	\$3,195	\$4,542
Estimated Exclusions for Excess Spending	(\$1,076)	(\$207)	(\$1,395)	(\$1,339)	(\$1,286)	(\$1,234)	(\$1,185)
Adjusted Equalized Pupil Estimate to Calculate Tax Rate	\$19,176	\$18,644	\$18,424	\$19,508	\$21,480	\$24,323	\$27,163
Equalized Per Pupil Divided by Forecasted Homestead Tax Yield	\$11,317	\$11,317	\$11,374	\$11,430	\$11,488	\$11,545	\$11,603
Equals the Estimated Equalized Union Tax Rate	\$1.6944	\$1.6474	\$1.6199	\$1.7066	\$1.8698	\$2.1068	\$2.3411
Minus Consolidation Incentive Revenue	\$0.0200	\$0.0200	\$0.0000	\$0.0000	\$0.0000	\$0.0000	\$0.0000
Equals the Estimated Union Tax Rate with Incentive Applied	\$1.6744	\$1.6274	\$1.6199	\$1.7066	\$1.8698	\$2.1068	\$2.3411
Prior Year Estimated Union Tax Rate	\$1.7722	\$1.7722		\$1.6199	\$1.7066	\$1.8698	\$2.1068
Equals Estimated Tax Rate Increase/(Decrease in cents)	(\$0.0978)	(\$0.1448)		\$0.0868	\$0.1632	\$0.2370	\$0.2343

Unfavorable Equalized Pupil Scenario	Equalized Pupils (Weighted Number of Students to Account for Differing Student Needs)		943.93	1,465.71	2,360.26	2,330.68	2,278.45	2,234.13	2,199.74	
	Change from Previous Year		-4.59	0.52	-49.38	-29.58	-52.23	-44.32	-34.39	
	% Change from Previous Year		-0.48%	0.04%	-5.23%	-1.25%	-2.24%	-1.95%	-1.54%	
	Spending per Eq. Pupil (Ed Spending Divided by Equalized Pupils)		\$19,175.56	\$18,643.84	\$18,423.53	\$19,507.60	\$20,919.03	\$22,362.64	\$23,805.74	
	\$ Change from Previous Year		-703.54	-75.28	-752.02	1084.07	1411.43	1443.61	1443.11	
	% Change from Previous Year		-3.54%	-0.40%	-3.92%	5.88%	7.24%	6.90%	6.45%	
	Spending Threshold (Amount per Equalized Pupil We Can Spend Before Tax Penalty Assessed)	Projected Threshold		\$18,789	\$18,789	\$18,883	\$18,977	\$19,072	\$19,168	\$19,263
	Amount over projected Threshold		\$387	-\$145	-\$459	\$530	\$1,847	\$3,195	\$4,542	
	Amount of Estimated Offset Credits		-\$1,076	-\$207	-\$1,395	-\$1,339	-\$1,286	-\$1,234	-\$1,185	
	\$ Threshold Change from Previous Year		\$33	\$33	\$94	\$94	\$95	\$95	\$96	
	% Threshold Change from Previous Year		0.18%	0.18%	0.50%	0.50%	0.50%	0.50%	0.50%	
	Change Needed to Be Under Threshold Using Credits		\$0	\$0	\$0	\$0	-\$1,278,129	-\$4,380,340	-\$7,385,164	
	Change in Pupils Needed to Be Under Threshold		0.00	0.00	0.00	0.00	-67.02	-228.53	-383.38	
	Change in Education Spending Needed to Produce 1% Change in Cost Per Equalized Pupil		\$181,004	\$273,265	\$452,593	\$429,394	\$444,471	\$467,358	\$491,920	
Tax Rate (After Penalty Applied)		1.6744	1.6274	1.6199	1.7066	1.8698	2.1068	2.3411		
Education Tax on \$300K Home		\$5,023	\$4,882	\$4,860	\$5,120	\$5,610	\$6,320	\$7,023		

This data represents ANWSD and MAUSD Finance Team predictions for FY23-FY27. Estimates based on data and history have been made to project spending, revenue, equalized pupil count, and spending threshold limits. Estimates are developed assuming no change is made to programming, or use of facilities. In the absence of guidance to the contrary, historical figures have been used to project future figures. The main drivers leading to the cost per equalized pupil include increasing salaries, routine double digit percent increases in healthcare premiums and declining student enrollment.

As was the case with mergers under Act 46, one-time savings from merging and consolidating Central Office services have a positive impact on property tax rates and effectively “bend the curve,” slowing the rate of tax rate growth and keeping rates lower than they would have been had there not been a merger. However, with increasing inflationary costs and declining enrollments, tax rates will continue to climb without additional work to collaborate in creative ways and implement more cost-effective practices.



MAUSD’s *Evaluation of Options to Address Declining Enrollment While Improving & Expanding Services to Students Report* by K-12 Solutions studied a number of options to address the impact of declining enrollment. Options were specific to MAUSD and considered options for partnership with ANWSD. Recognizing that enrollment is likely to be relatively stable, with an annual decline of 3-5% expected annually, for elementary grades and a decline at the middle-high school levels, the Committee supports a vision for the future that includes combined middle and high schools and collaboration at the elementary level to ensure all students have comparable, high-quality learning opportunities. The K-12 Solutions Report indicates:

- Estimated savings from combined middle and high schools = \$2.5M
- Estimated savings from cost-effective policies at the elementary level = \$1.2M

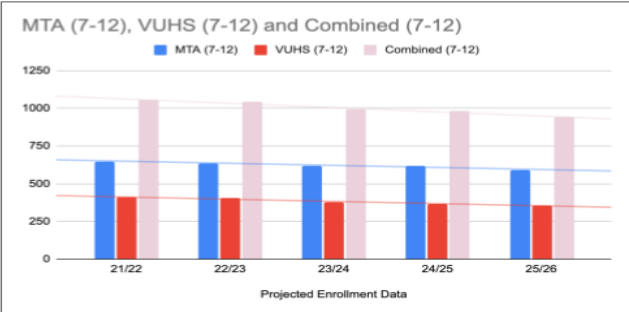
The ANSD will be positioned to work with communities to plan for the implementation of changes needed to sustain opportunities for students while bending the tax rate increase trajectory. Most of the options for efficiencies while sustaining opportunities for students are not available in the current structure.

Opportunities for Learning

For MAUHS, enrollment in grades 7-12 is declining and is expected to drop from 647 in SY22 to 589 in SY26. Declining enrollments will lead to continued staff reductions through and/or attrition. Staff reductions lead to limited program offerings, loss of programs, and class sizes that are not optimal. Of particular concern are areas such as performing arts, elective offerings in core content areas, design technology, world language for middle school, and other extension opportunities for middle school students (exploratories).

At VUHS, enrollment in grades 7-12 is declining and is expected to drop from 411 in SY22 to 356 in SY26. Declining enrollments lead to staff reductions that would limit course offerings and/or result in loss of programming. Particular areas of concern include Performing Arts - Music, Personalized Learning & Electives, World Languages, and AP Offerings.

Projected Enrollment Data	21/22	22/23	23/24	24/25	25/26
MTA (7-12)	647	638	620	616	589
VUHS (7-12)	411	404	376	369	356
Combined (7-12)	1058	1042	996	985	945



Current graduation requirements for MAUHS and ANWSD are very similar:

Current Program Graduation Requirements

Graduation Requirements	ANWSD	MAUSD
English	4	4
Mathematics	3	3
Science	3	3
Social Studies	3	3.5
Fine Arts	1	1
PE	1.5	1.5
Health	0.5	0.5
Tech.	0.5	NA
World Languages	NA	NA
Financial Literacy	0.5	*within Math requirement
Electives	5.5	7.5
Completion of PLP	NA	Presentation required senior year
Total Required	22.5	24

*Values in Proficiency-Credits

Both MAUHS and VUHS have worked to sustain a robust menu of course offerings:

Course Offerings (HS - 9-12)

	ANWSD	MAUSD
English	11	24 (12 rotate)
Mathematics	9	12
Science	8	19 (8 rotate)
Social Studies	10	20 (11 rotate)
Fine Arts	10 Perf / 6 Visual	8 Perf/12 Visual (5 rotate)
PE	3	5
Health	2	2
Tech. / Ag Science	5 / 4	10 (2 rotate)
World Languages	German/Spanish 1-5	13 (languages: spanish/french)
Financial Literacy	1	1
Electives/Drivers Ed	5	8
Completion of PLP	Morning Meeting	Advisory
Total	84	134 (38 rotate)

*Rotating courses are not offered every year. They are offered on a rotating basis, typically every other year.

In a union district, there would be more flexibility to share staff and extend opportunities between middle and high schools. If the middle and high schools were merged, all students would have more opportunities. A review of class sizes by department (below) indicates that both schools' class sizes are very reasonable.

Department Class Size Averages (HS)			Continued...		
	MAU	VUHS		MAU	VUHS
Design Tech*	11.9	16.4	Phys Ed	17.1	13.6*
Drivers Ed	18.0	11.7	Science	19.3	13.6
Health Edu	14.6	13.6*	Social St.	19.4	18.3
Literacy	18.9	18.1	World Lang	15.2	12.1
Math	18.9	16.1	Pers Lrng	9.8	4
			Performing Arts	9.6	6.8**
			Visual Arts	15.3	10.7

*Limited space dictates enrollment

*PE/Health Combined at VUHS
**Music & Theater

With increased enrollment at the middle and high school levels, the number of sections offered can increase then there will be more flexibility for students to fit needed and desired courses into their schedules. Increased requests for courses will stabilize class sizes (less variability) and in some cases bring requests above the threshold for running the course/section. That means courses are less likely to be dropped at the start of a school year due to low enrollment. Combining attrition across the districts decreases the potential to result in cuts and allows for the better mobilization of staff.

Education leaders from ANWSD and MAUSD advocate that together MAUHS and VUHS would be stronger. For example, for World Languages, they would be better able to maintain 3 languages and have increased potential to offer AP language options. Music (band) groups can meet basic minimum participation levels to be viable. Similarly, enrollment numbers for other options may allow them to continue. For AP courses, there will be more options possible and better possibilities for students to fit these courses in their schedules. It will also be possible to grow high-interest programs such as design technology and maintain/grow elective offerings for proficiency attainment.

If enrollment continues to decrease as projected, there will be fewer offerings (within subject areas, as well as whole programs), fewer teachers, and optimum class sizes. Particularly for smaller programs and courses, this could mean program or course elimination.

The opportunities for middle-level students may also be enhanced through increased collaboration in a union. *Evaluation of Options to Address Declining Enrollment While Improving & Expanding Services to Students Report* by K-12 Solutions indicates that moving the 6th grade to the middle level meets a number of the priority criteria identified by community

members and the school board for addressing the challenges of declining enrollment. In MAUSD alone,

“It would be easier to provide a broad array of academic and enrichment options for these students. It would also be easier to maintain target class sizes for grade 6 in one school rather than five schools. The consolidation of sixth graders would also provide a larger peer group, which is in line with the criteria.

Moving the sixth grade to the middle school would also have financial benefits. Having more students at a grade level in one school leads to greater staffing efficiency. The middle school leadership indicates that the middle school could absorb all 6th graders without adding any staff. This is both a reflection of greater efficiency and the existence of extra capacity at the middle school due to the inefficiencies of having a small middle school. Moving the sixth grade to Mt. Abe would save over \$700,000”

Further, increased enrollments in the middle grades would make it easier to provide a broad array of academic and enrichment options, social and emotional supports, and maintain desired class sizes.

MAUSD’s *Evaluation of Options to Address Declining Enrollment While Improving & Expanding Services to Students Report* by K-12 Solutions indicates that, if MAUHS and VUHS were combined:

“The larger number of students in each grade would make it easier to provide a broad array of academic and enrichment options, social and emotional supports, and meet both the financial goals and class size targets. Combining secondary schools with ANWSD is also consistent with keeping or expanding the number of students in a grade-level peer group. With careful planning and a modest adjustment to start times, transportation times can also meet the criteria....

Combining middle and high schools with ANWSD has both financial and educational benefits. Each school would have a larger number of students in each grade level, which generally makes staffing more efficient. Additional economies of scale come from more cost effective staffing of school leadership and many support functions like guidance and special education. From an educational perspective, a larger number of students in a given grade makes it cost effective to offer more electives, specialized programs, and student support services. It also increases the size of students’ peer groups.

Merging middle and high schools with ANWSD would have one grade 6-8 middle school and one 9-12 high school. This would save \$2,100,000 at the high school and \$425,000 at the middle school for a total savings of \$2,525,000....

Transportation costs would increase. The most cost effective solution that also maintains similar transportation times was developed by a transportation

consulting firm, Decision Support Group, under a separate contract with the district. They calculated the additional transportation cost of \$165,000.”

For all grades in all schools, possibilities for improved outcomes and opportunities for students along with creating a work environment that supports, attracts, and retains teachers in a more cost-effective way could be more easily achieved in a larger system.

Instructional coaching is a highly recommended best practice for improving student achievement and supporting teachers, and in a larger system, full-time, skilled coaches could be carefully allocated to each school based specifically on the number of teachers to be coached. It is estimated that MAUSD could run a cost-effective high-quality instructional coaching program for roughly \$700,000 less. These savings could be extended in partnership with ANWSD.

Similarly, recognizing that some students will need more time and help than others to master grade-level content, the schools of ANWSD and MAUSD provide intervention support. These are best practices and changes in Vermont law support investment in high-quality intervention. These services, too, can be better scaled and sustained in a larger system with collaboration across schools so that each school, based specifically on student needs, has the right amount and types of intervention support. Additionally, interventionist positions can be structured in ways that work for teachers with thoughtful planning about schedules, to attract, retain, and support teachers.

In other areas where student opportunities vary across schools, such as for music, arts, and world language, with careful planning and cost-effective policies all students in all schools can have equitable access to programs and each school can have the amount of teacher time needed based on the number of students, both expanding opportunity and creating efficiencies.

The Articles of Agreement also provide for school choice within the District, a plan modeled after ANWSD's current policy, and expanded for middle and high school students. While the elected Board will have the responsibility for setting policy in the ANSD, as is required by law, the Articles of Agreement establish a solid foundation for school choice within the District by specifying that the ANSD Board may grant a parent's or guardian's request for student enrollment in a different school operated by the ANSD based on individual student circumstances and the Superintendent's determination of the school's capacity to serve the child by following ANWSD's policy on school choice within the ANSD for students in all grades, K-12 for the first year of operations. Each student who received ANSD Board approval to attend a different school within the ANSD, shall be assured the opportunity for enrollment in that school until they complete all grades offered at their school of choice and as long as the student continues to reside in the ANSD. High school students participating in school choice within the District shall be required to meet the graduation requirements for the school they attend.

Transportation

The impacts and options for student transportation in a merged district were analyzed by Tim Ammon of Decision Support Group (DSG). The Transportation Study explored two options for designing a regional transportation system that would support minimized ride times, minimized costs, and operational efficiency in a merged system. The study framed two key options: 1) a dedicated system of services for middle and high school students while refining and revising the in-district system for elementary students; and 2) an integrated shuttle system that connects the two existing districts, but limits disruption to the current transportation system. Key decision factors used by DSG to assess the viability of the models included school-day time requirements, impact on student travel time, cost, and availability of resources, such as buses, and personnel.

The Transportation Study concluded that establishing a merged district would not be limited by transportation demands. DSG indicated that the development of a shuttle network between the districts is the most viable option. Shuttling would present some logistical challenges, including for changes to school start and end times, but would be less costly and would help with the most significant transportation challenge forecasted regardless of transportation model, and driver availability. Cost increases for transportation are expected, primarily related to driver availability, regardless of transportation model or merger status.

See the appendices for the Transportation Study, excluding slides with bus route information, which were removed for student safety and privacy purposes.

Act 46 Outcomes

The Committee also reviewed information regarding the outcomes of the Act 46 mergers in ANWSD and MAUSD. The Study Committee reviewed each District's Study Report (Addison Northwest Supervisory Union Act 46 Study Committee Unified Union School District Report December 30, 2015) and ANESU Act 46 Study Committee Final Report and Articles of Agreement, September 1, 2016) and identified all projected outcomes, then reviewed each outcome to determine if it was fully, partially, or not accomplished.

The Committee's review found that an overwhelming majority of the possible positive outcomes of merging have materialized, from the capture of cost savings to improved curriculum coordination. For ANWSD, 19 of 23 outcomes were fully or partially realized, and for MAUSD, 29 of 30 of the outcomes identified were fully or partially realized. These outcomes included the accomplishment of one-time administrative savings, slowing of tax rate increases, and maintaining learning opportunities for students while enrollment declined. For example, MAUSD's average homestead property tax rates are \$0.33 (33 cents) or 17% lower than was projected for this time had MAUSD not been formed. Committee members noted that for areas such as curriculum coordination, much has been accomplished, but there is much more that can be gained as the collaborative work continues.

See the appendices for the Committee's Act 46 Outcomes Reviews for ANWSD and MAUSD.

Supervisory District Preferred

The Merger Study Committee considered the implications of both a supervisory district and supervisory union structure if a union is formed. The Committee concluded that a supervisory district, where required services such as administration, transportation, special education, and financial and data services are integrated into the school district's systems, is preferred.

Evaluation of Options to Address Declining Enrollment While Improving & Expanding Services to Students Report by K-12 Solutions estimates that \$1.3 Million dollars can be saved with a merger of Central Office services between MAUSD and ANWSD. The opportunity for these savings is important for bending the curve of tax rate increases and increasing efficiency.

Further, the report highlights a supervisory district structure best positions the District for implementing a cost-effective mindset for all schools, with thoughtful sharing of resources, a better structure for attracting and retaining teachers, staff, and administrators, and improved opportunities to sustain and grow opportunities for students. The Committee's study reflects that a supervisory district provides a more transparent and representative governance structure. (See this report's discussion of other options considered for more information.)

If the ANSD is assigned to a supervisory union, some savings may be possible, however, there may also be additional costs to consider. There are both transition costs and additional increased administrative costs in this model. The specifics of these additional costs would depend upon decisions about the grades to be served, board representation and size for each district, school location(s), number of districts and grades served by each, and supervisory union assignment and structure. Transition costs would vary and be based upon the costs for the formation of multiple new fiscal entities; establishment of multiple new financial systems and charts of accounts; the transition of employees to new employers, including assurance that payroll and benefits transfer smoothly; additional financial and human resources staff for the transition; development of multiple new sets of policy; legal support; and more. A supervisory union structure with multiple districts would also have ongoing cost implications including multiple annual audits; increased board compensation; negotiation of multiple master agreements; additional administrative and financial staff to serve new structures; maintenance of multiple sets of policy, perhaps with different policies and needs; communication and community engagement around a more complex budget and tax rate calculation, and more.

Additionally, board representation in a supervisory union assigns three seats to each district. In a supervisory union, it is quite possible that a large portion of a system's operations would be overseen by a board that does not have proportional representation. For example, if Lincoln is assigned to an SU comprised of the Lincoln School District and one other district, the ANSD, Lincoln, representing 1,323 citizens, would have three seats on the SU Board, and the ANSD representing 16,956 citizens, would have three seats. In this example, 6.7% of the citizens hold 50% of the vote on all supervisory union services including special education, administration, fiscal and data services, transportation, and more.

Community Values

The ANWSD-MAUSD Merger Study Committee began its work with community engagement activities to clarify community values, goals, and considerations that would serve as the framework for the design of the best union possible and compare the pros and cons of the proposed model with continuing in the status quo with an eye to the future. The Committee heard from many voices and perspectives. Key values, goals, and considerations that emerged include:

- Support and protect our elementary schools
- Sustain commitment to innovation and best practice
- Ensure a positive culture characterized by positive relationships, valuing individual uniqueness and inclusion
- Promote strong school-community partnerships
- Promote and enable responsible management of costs and tax rates
- Frame a transparent and well-governed system informed by local community voice
- Ensure equitable access to technology, learning opportunities, and extracurricular activities across schools
- Provide developmentally appropriate instruction and supports such as middle-level best practice, shorter bus rides for younger students, and access to PreK
- Attract, retain and support valued teachers and staff
- Support student voice in school decision-making
- Improve student outcomes where there is variability

A key question for the Committee throughout the study process has been, “What is most likely to best support and grow the way our education system represents these values and priorities in the future?”

The appendices include the complete synthesis of community input on values and considerations.

Community Feedback on Draft Articles of Agreement

The Committee hosted a joint meeting including the ANWSD and MAUSD Boards on May 23, 2022, to get feedback on the draft Articles of Agreement. Faculty and staff and students also had dedicated time to learn about the draft articles and give feedback. In addition to feedback in facilitated settings, everyone had the opportunity to share their thoughts via an online tool called ThoughtExchange. The video and ThoughtExchange link were posted on school websites, Front Porch Forums, and Facebook. Information was emailed to town clerks in all ANWSD and MAUSD towns for sharing with select boards and sent home in school newsletters.

Feedback related to the draft language for protecting and supporting elementary schools was evenly mixed, advocating that the proposed language was both too restrictive and not restrictive enough. There was some feedback about the board structure and the amount of voice a community would have with weighted voting.

Much more of the feedback reflected thoughts and questions about a merger in general. The most frequent feedback included:

- Need for a side-by-side comparison of a merged vs non-merged scenario with tax bills, building use, class sizes, and staffing.
- Need for a clearer understanding of the administrative structure (number of superintendents, central office, etc.)
- Top themes:
 - Administrative structure
 - Budget and Finance
 - Governance/Local Decision Making
 - Transportation
 - Curriculum/Programs
 - Other - pros/cons and benefits for students

Feedback from students included the same themes as from all stakeholders in general with two additional points:

- Student voice is important and should be included as part of planning and decision-making when there are impacts on the day-to-day experiences of students.
- School culture and relationships are important.

See the appendices for the Thought Exchange Summary.

A Multi-Year Process

The Committee believes that in a 3-5 year time frame, the new union district can sustain, and hopefully expand, learning opportunities for Middle and High School students, increase cost efficiencies, increase equity, merge governance, merge middle and high schools, expand grade levels served at the middle school, and expand cost-effective mindset across the ANSD. Given the breadth of the work, it must be a multi-year process and it should include input from a variety of stakeholders, with oversight from an elected, representative school board.

It is reasonable to expect change to unfold in a multiyear process. The Committee considered the unification has two phases:

- Phase One: Consolidation of Governance and Business Operations; and,
- Phase Two: Consolidation of Educational Operations.

In Phase One, the primary focus will likely be on administrative matters and transitioning to the consolidation of Central Office services. An important initial goal is to ensure efficient, transparent business operations, and care for employees, students, families, and communities.

Key areas of work will include, for example,

- Human resources and employee transition
- Budget development and integration of financial systems
- Policy development, including per parameters included in the Articles of Agreement
- Family and community engagement, building the culture and community

During Phase One, the new district may also take advantage of easy opportunities to make improvements for students as they emerge.

In Phase Two, the focus shifts to the consolidation of educational operations. This should include a multi-year process for alignment and collaboration in curriculum, instruction, and assessment. Work to evaluate the best options for sustaining and growing opportunities for middle and high school students and engage stakeholders in planning and decision-making. And, with a solid administrative foundation, it is reasonable to expect more growth in terms of implementation of cost-effective policies, especially at the elementary level. Planning for opportunities includes, for example,

- Student Support Services
- Secondary Programming and Consolidation
- Middle School Programming and Consolidation
- Transition to Combined Co-Curricular Programs (*e.g. athletics, drama, music*)
- Implementing Central Office efficiencies
- Branding, new identity

To provide stability and clarity, especially during the first year, the Articles of Agreement ensure that things would feel very much the same as they do now for teachers, families, and students.

Surpluses, Debt, and Special Funds

All surpluses, debt, and special funds will be transferred to the ANSD. See below for a discussion of long-term debt. All special funds must be used per their original, intended uses.

Excerpts from ANWSD and MAUSD’s audits are attached as appendices and list special revenue, or fiduciary funds, held by each district. Complete information regarding all funds, ad debt can be found in the FY21 audits for ANWSD and MAUSD posted on each district's website.

School Facilities, Facilities Needs, and Long-Term Debt

Property Values

The value of ANWSD and MAUSD properties are summarized in the table below.

	Total Insured Value	
	FY22	FY16 +3% annual
Addison Wayfinder Experience Program	\$ 4,122,237	
Ferrisburgh Central	\$ 6,597,861	
Elem Mod Classroom	\$ 130,674	
Vergennes UES #44	\$ 8,300,862	
Vergennes UHS #5 (MS/HS)	\$ 27,928,212	
Storage	\$ 55,468	
ANWSD Total	\$ 47,135,314	

Bristol Elementary		\$ 10,835,850
Lincoln Community		\$ 2,923,653
Monkton Central		\$ 4,499,471
Beeman Elementary		\$ 4,000,183
Robinson Elementary		\$ 4,800,488
Mt. Abraham UHS		\$ 32,091,117
MAUSD Total		\$ 59,150,761

Property values that would be transferred to the ANSD are roughly proportionate to the equalized pupil count and census populations for ANWSD and MAUSD. Thus, each District is contributing property fairly to the ANSD.

Long-Term Debt, Capital Funds, and Capital Needs

The context for considering the implications of long-term debt is characterized by two different approaches to managing major capital needs. In sum, however, both districts invest comparable amounts into capital improvements on an annual basis and have proportionate capital needs in the future.

ANWSD

ANWSD addressed major capital and energy efficiency needs with a performance bond (work completed in 2018) which was expected to be partially offset by reductions in energy expenses of \$200,000 per year. ANWSD has two small additional bonds. ANWSD maintains school-specific capital funds from prior to the 2016 merger and merged SD capital fund which is used to offset the cost of capital needs across the merged ANWSD. The amount of \$475,000 was allocated to the capital fund in FY2021.

Year Ending June 30,	Bonds Payable		Note from Direct Borrowings Payable		Total
	Principal	Interest	Principal	Interest	
2022	\$ 1,072,778	\$ 342,409	\$ 4,093	\$ 252	\$ 1,419,532
2023	638,889	326,826	-	-	965,715
2024	638,889	310,134	-	-	949,023
2025	638,889	292,559	-	-	931,448
2026	638,889	274,013	-	-	912,902
2027-2031	3,044,445	1,036,972	-	-	4,081,417
2032-2036	2,829,443	504,180	-	-	3,333,623
2037-2041	847,778	65,703	-	-	913,481
	<u>\$ 10,350,000</u>	<u>\$ 3,152,796</u>	<u>\$ 4,093</u>	<u>\$ 252</u>	<u>\$ 13,507,141</u>

ANWSD Long-Term Debt - FY21 Audit

	6/30/21	7/1/21
Fund Balance - Capital Improvement Fund ANWSD	\$175,116.22	\$650,116.12
Fund Balance - Capital Improvement Fund VUES	\$58,210.57	\$58,210.57
Fund Balance - Capital Improvement Fund VUHS	\$240,896.30	\$240,896.30
Fund Balance - Construction Fund ACS	\$23,079.42	\$23,079.42

		\$972,302.41
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ANWSD Capital Improvement Funds

ANWSD has a Facilities Stewardship Plan which outlines facilities and capital investment (such as for large equipment) needs:

Location	FY2022	2-5 Years	6-10 Years	11-15 Years	16-20 Years	20+
ANWSD/District-wide	\$820,000	\$451,500	\$118,500	\$180,000	\$151,000	\$0
Addison Wayfinders	\$47,000	\$475,656	\$115,000	\$16,000	\$0	\$0
Ferrisburgh Central	\$29,500	\$385,984	\$0	\$110,000	\$0	\$0
Vergennes Elementary	\$90,500	\$785,000	\$35,000	\$192,000	\$68,000	\$0
Vergennes Union MS/HS	\$587,174	\$2,065,000	\$170,000	\$27,500	\$0	\$0

MAUSD

MAUSD has historically sought the support of the electorate to secure bonds to support major facilities renovation improvement and major repairs, but bonds have not been approved. Thus, MAUSD has less debt, however, maintains a higher capital reserve fund, and generally makes an annual contribution to their capital reserve fund of \$1,100,000. MAUSD also uses resources from a general education reserve fund for capital needs.

Year	Bonds Payable		
	Principal	Interest	Total Debt Service
2022	\$ 178,032	\$ 12,525	\$ 190,557
2023	178,032	9,981	188,013
2024	178,032	7,584	185,616
2025	178,032	5,112	183,144
2026	178,032	2,747	180,779
2027-2030	294,553	1,329	295,882
	<u>\$ 1,184,713</u>	<u>\$ 39,278</u>	<u>\$ 1,223,991</u>

MAUSD Long-Term Debt - FY21 Audit

MAUSD Capital Improvement Funds:

	6/30/21	7/1/21
Fund Balance - Capital Improvement Fund	\$910,118	
Budgeted Line Item for Capital Improvement - FY21		\$1,100,000

MAUSD Capital Construction needs and cash flow are planned and monitored carefully and reflect several major projects over the 5 year period beginning with the current year, FY22:

Project ↓↓		FY22	FY23	FY24	FY25	FY26
MTA Lobby (inc all soft costs)	\$1,620,117					
MTA 2nd Floor Bathrooms	\$510,000					
MTA Roof	\$1,500,000					
Electric Upgrade/Solar?	\$1,000,000					
Central Office Beeman	\$1,400,000					

These major projects have a total estimated cost of \$6,030,117. Additional, smaller projects for the same time period total an additional \$949,560. An investment to update the MTA science labs could also be addressed in the next 5 years.

Disposal of Property

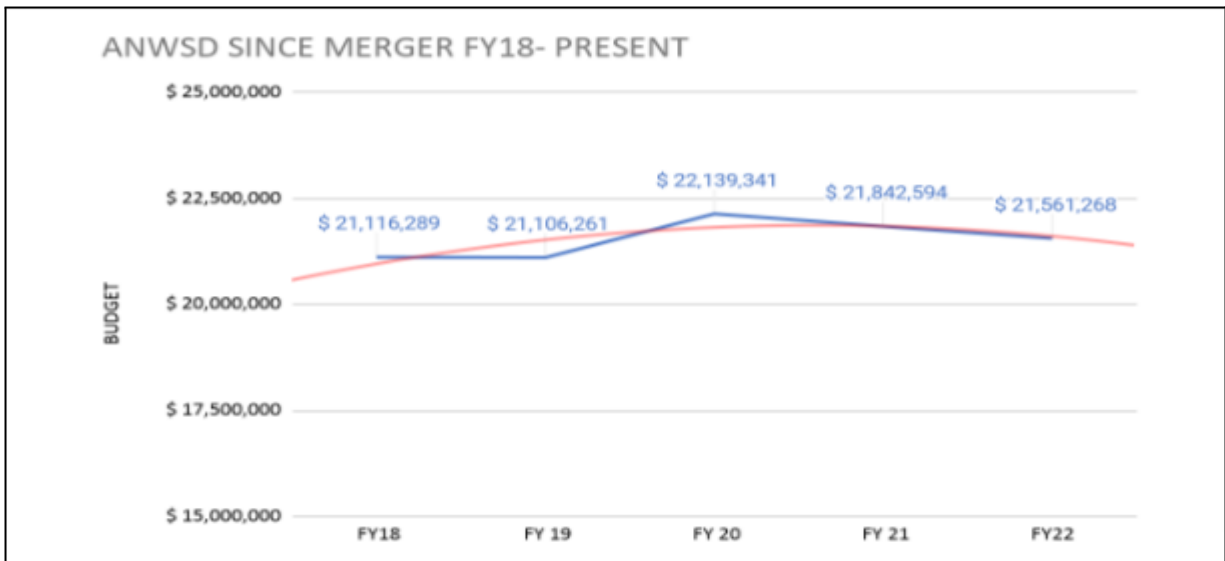
In the unlikely event that some school buildings may not be needed for educational purposes in the future, provisions for disposal of school property are based upon the provisions for disposal of school property outlined in ANWSD and MAUSD’s Articles of Agreement and provide for a return of property to towns for public use or sale per the provisions in the law.

Other Options Considered

ANWSD

The ANWSD Board provided updates and information to the ANWSD-MAUSD Merger Study Committee on several occasions. Updates and Board participation addressed the context and rationale for ANWSD’s participation in a merger study and the other options ANWSD has considered and already taken to address ANWSD’s concerns regarding declining enrollment, increasing tax rates, and reductions in staff and opportunities for students.

ANWSD’s ongoing work through their work is summarized in their resource, *Our District, Our Future: Frequently Asked Questions 2020-2021*. Despite cuts in programs and closing a school (Addison), described as big sacrifices, declining enrollments have a compounding effect on per-pupil costs, thus tax rates. ANWSD’s budget for FY21 was within 1% of the FY18 budget amount, a very small increase over a three-year period.



During that time from FY18-FY22, ANWSD eliminated 32 positions, mostly through attrition, closed a school, and consolidated ANWSD Central Office services. ANWSD also considered:

- Moving Central Office
- Closing Central Office and provide all Central Office services remotely
- Consolidating Central Office services with another district (MAUSD)
- A Facilities Best Use study by the New England School Development Council (NESDEC)
- Partnering with MAUSD to operate middle and high schools in a variety of different structures
- Offering school choice
- Closing additional elementary schools
- Partnerships with ACSD (Addison Central School District)
- Increased online learning opportunities
- Strategies to attract more residents with children to ANWSD
- Continuing to study and hold out, hoping things will improve

See the appendices for ANWSD's *Our District, Our Future: Frequently Asked Questions 2020-2021*.

MAUSD

The ANWSD-MAUSD Merger Study Committee communicated with representatives of the MAUSD Board on several occasions to ensure a thorough understanding of MAUSD's context for considering forming a union as well as other options studied. MAUSD's explorations of a wide range of options began in 2017 and included a survey that was distributed asking what services could be shared and about other options available for cost savings. The MAUSD Board asked the superintendent to develop a proposal that would preserve and align opportunities to projected revenues given the decline in enrollment. The Superintendent offered four options for further study which were drawn from a Facilities Best Use Study conducted for MAUSD by the New England School Development Council in November 2020. The proposals included: a structure with 5 elementary schools, and 1 middle/high school; 2

elementary schools and a 6-12 middle/high school; 2 elementary schools, 1 middle & 1 high school; and, 1 K-8 school and high school choice, and merging districts with ANWSD. The options were reviewed with consideration of a number of alternatives and possible impacts and outcomes. The MAUSD Board solicited community feedback on options.

Ultimately, MAUSD contracted with the K-12 Solutions, which analyzed seven proposals for addressing the challenges of declining enrollment. The seven proposals include approximately two dozen distinct components, some of which appear in multiple proposals. Each component was evaluated both financially and qualitatively. The evaluated options include:

Maintain Five K-6 Elementary Schools

- Develop Community Schools
- Increase enrollment by establishing Community Schools
- Establish themed schools of choice
- Embrace the Sister School concept

Secondary Components

- Move Grade 6 to Middle School
- Combine Mt. Abe Middle and High School with ANWSD
- Tuition HS Students to neighboring schools
- Upgrade the Mt. Abe facility
- Rent all or part of Mt. Abe
- Establish public/private partnership for Mt. Abe renovations for community space

Implement Weighted Student Formula

- Set allowable spending per student with weighted student funding (WSF)
- Empower principals to make more budget decisions
- Cost for training principals in financial and budget management

Central Office Components

- Merge Central Office with ANWSD
- Move Central Office to a District Building

Other Elementary options

- Create K-8 schools in each town
- Move Bristol Elem. to other elem. schools and create a District-wide Grade 5-8 MS at Bristol
- Consolidate 5 elementary schools into 2 schools
- Develop Innovation Schools at 3 sites

Cost-Effectiveness Mindset Components

- Streamline “Middle Management” and have leaders wear more hats
- Adopt a cost Effectiveness mindset best practice approach to Instructional coaching
- Apply a cost-effectiveness mindset approach to intervention

The report found that:

“Based on the enrollment projections from NESDEC and the best estimates available on the future of state funding, MAUSD will likely face two recurring challenges over the next decade.

Total revenue will drop as equalized enrollment drops and per-pupil costs will increase faster than state per-pupil funding increases. This means that some budget trimming or tax increases will be needed most years. Even if dramatic changes are made as some of the proposals suggest, there will be an ongoing need to thoughtfully trim budgets, match staffing to enrollment, and/or raise taxes as enrollment dips. Any future plan needs to create a system that can manage this reality.”

Further, it was recommended that:

“Action is needed, but no employee needs to lose their job and changes can be phased in over a few years.

Doing nothing does not seem possible given the most likely enrollment and funding forecasts.

Fortunately, changes can be phased in over time and through attrition so that no employee loses their job. Some staff might need to work in a different school or take on a role for which they are already certified. The large amount of federal ESSER funds can provide a buffer to create a plan and forge buy-in.”

The K-12 Solutions Report indicates:

- Estimated savings from combining Central Offices = \$1.3M
- Estimated savings from combined middle and high schools = \$2.5M
- Estimated savings from cost-effective policies at the elementary level = \$1.2M

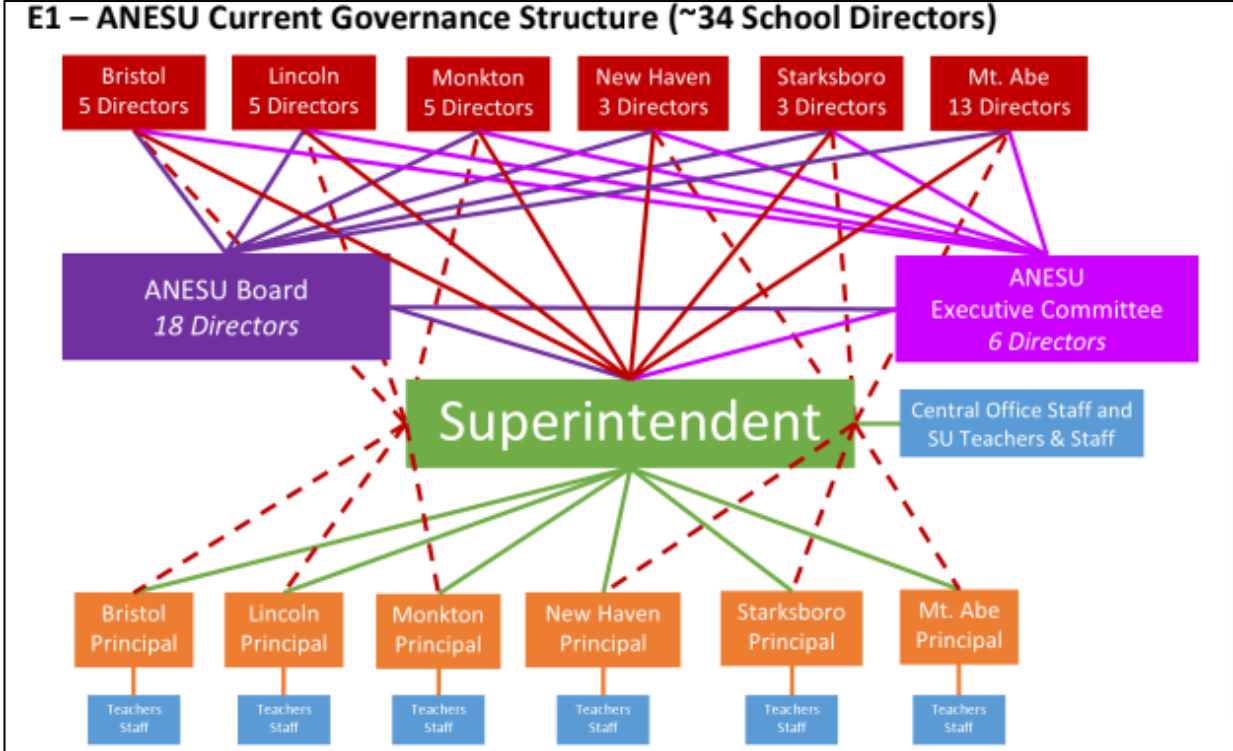
*MAUSD’s contracted study, K-12 Solutions Report is available on the MAUSD website.

Merger Study Committee

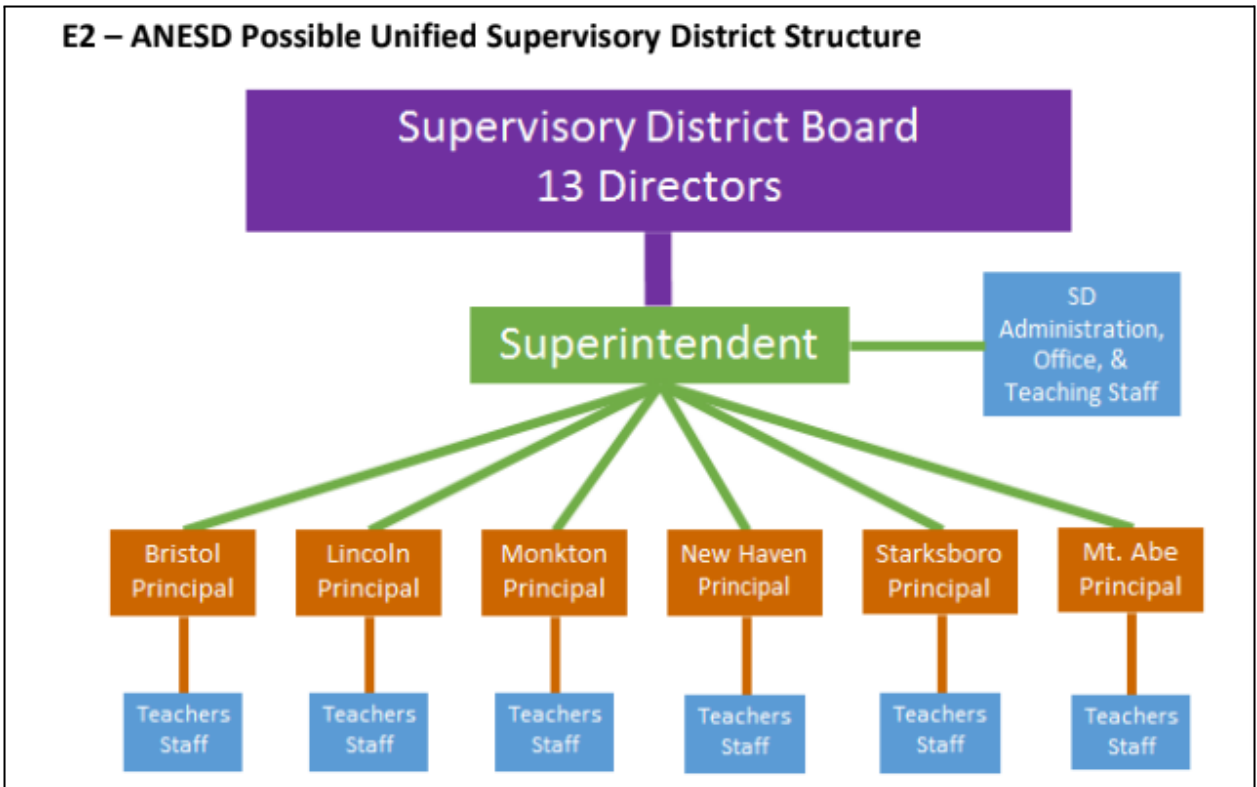
Per Vermont law, a merger study formed pursuant to 16 VSA Chapter 11 is to study the advisability of forming a union school district. For ANWSD and MAUSD, there are two main union school district options: a unified union and a union. A union school district is formed when two or more school districts merge into one district, a union school district, for the purpose of owning, constructing, maintaining, and operating schools for some grades. A Unified Union School District is a union school district that provides for the education of all PK-12 students residing within its borders.

No matter the form, all school districts are assigned to a supervisory union by the Vermont State Board of Education for administrative and support services, including, but not limited to services specified in law, such as curriculum, special education, financial and data management (16 VSA § 261 (a)). If those services are integrated within a PK-12 unified union school district, that is known as a supervisory district. If those services are provided by a separate entity to multiple school districts, that is known as a supervisory union. ANWSD and MAUSD are PK-12 supervisory districts as of the date of this report. Prior to their mergers under Act 46, ANWSD and MAUSD (formerly ANESU) were supervisory unions.

Supervisory Districts, such as ANWSD, MAUSD, and the proposed ANSD tend to be more cost-effective and streamlined, thus transparent in terms of governance as compared to supervisory unions. (See the appendicies for the Committee's review of the outcomes of Act 46 mergers in ANWSD and MAUSD, including cost savings, ongoing efficiencies, and improved educational services and opportunities.) MAUSD's 2016 comparison of governance structures illustrates the differences between a supervisory union structure as compared to a unified union supervisory district:

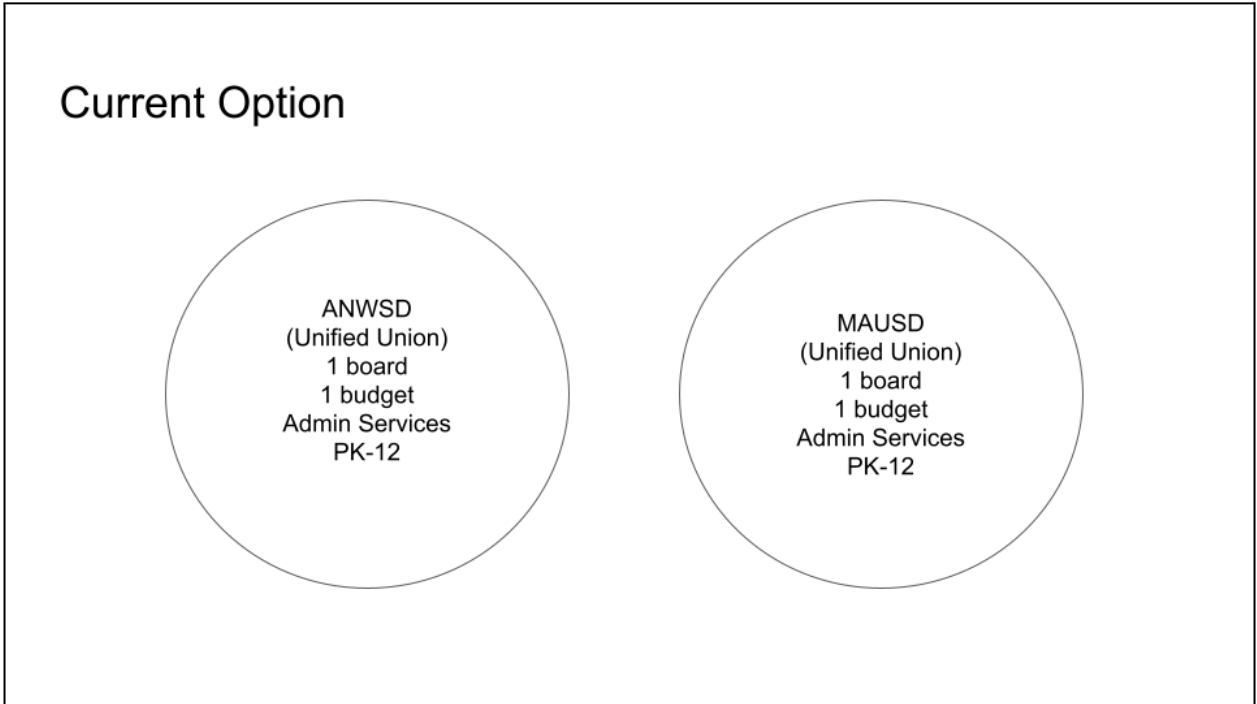


This figure illustrates ANESU's governance structure before the formation of a unified union supervisory district under Act 46.



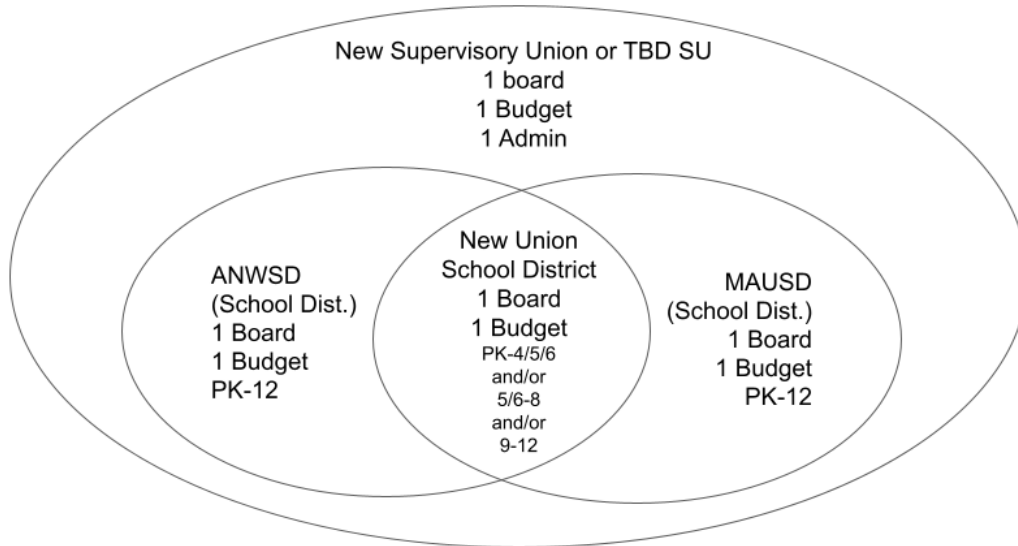
This figure illustrates ANESU's governance structure as a unified union supervisory district.

The Committee compared the current governance structures for ANWSD and MAUSD with a model providing for a union school for some grades, such as for middle and high school grades, and separate elementary school districts for ANWSD and MAUSD in a supervisory union with a merger into a single unified union school district.



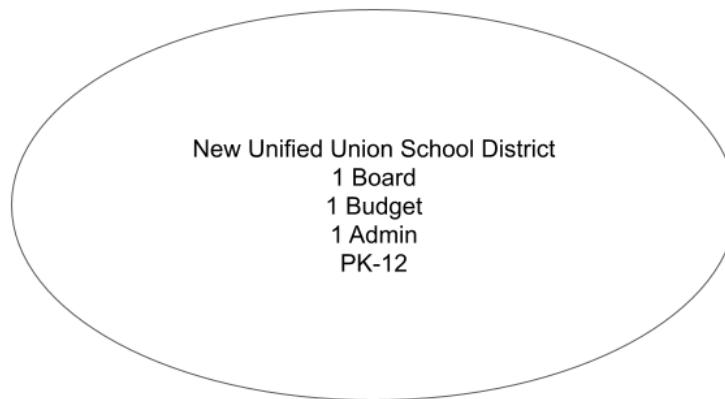
This figure illustrates the current governance structure for ANWSD and MAUSD.

Union Option 1: Union for Some Grades



This figure illustrates a union between ANWSD and MAUSD for some grades, such as for a union high school, with separate districts for other grades, and a separate supervisory union.

Union Option 2: Unified Union for PK-12



This figure illustrates a union between ANWSD and MAUSD for all grades with supervisory union services included as a supervisory district.

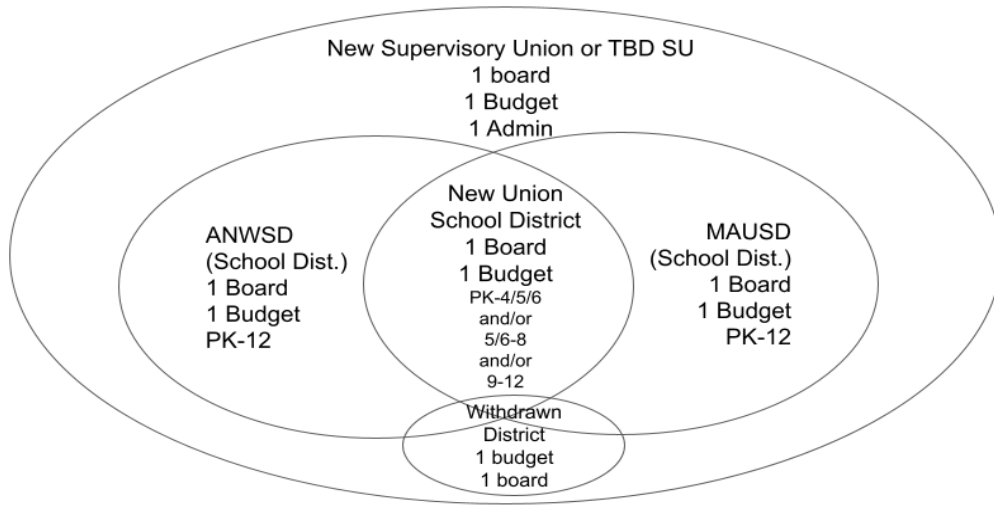
The Committee identified that the formation of a union school, say for middle and high school students, would follow the same process as for the formation of a unified union district. Many

of the costs and implications of the formation of a union school are the same as for the formation of a unified union district. Examples of costs might include transportation, retrofitting facilities, etc. Any costs/savings/reallocations for learning opportunities that are associated with students are possibilities in either structure.

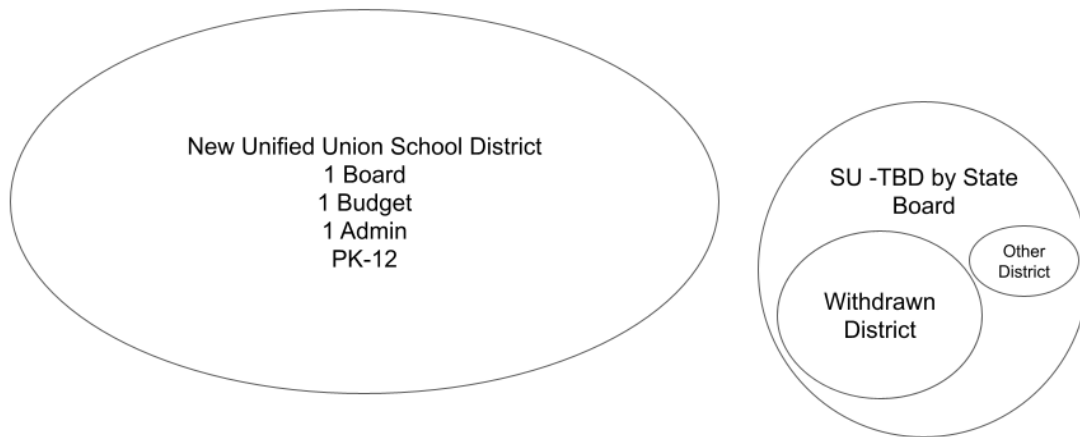
However, there are a number of cost considerations and variables with the formation of a union school. One key consideration is the matter of supervisory services. If a union school between ANWSD and MAUSD is formed for middle and high school, for example, the three districts will each serve some grades, and will no longer be supervisory districts. Thus, the supervisory (Central Office, special education, transportation, etc) services will need to be pulled from the districts and the districts and services must be assigned to a supervisory union. There are both transition costs and additional administrative costs in this model. The specifics of these additional costs would depend upon decisions about the grades to be served, board representation and size for each district, school location(s), number of districts and grades served by each, and supervisory union assignment and structure. Transition costs would vary and be based upon the costs for the formation of multiple new fiscal entities; establishment of multiple new financial systems and charts of accounts; the transition of employees to new employers, including assurance that payroll and benefits transfer smoothly; additional financial and human resources staff for the transition; development of multiple new sets of policy; legal support; and more. A supervisory union structure with multiple districts would also have ongoing cost implications including multiple annual audits; increased board compensation; negotiation of multiple master agreements; additional administrative and financial staff to serve new structures; maintenance of multiple sets of policy, perhaps with different policies and needs; communication and community engagement around a more complex budget and tax rate calculation, and more.

The Committee also considered possibilities for governance that may emerge if districts withdraw from a union district. There are many possible structures that could be created depending upon the decisions of the Vermont State Board of Education regarding the assignment of districts as supervisory districts or supervisory unions and the decisions of voters regarding operational structures. Two possible examples are below:

Union Option 1c/d: Union for Some Gr. w/ Dist. Withdrawal



Union Option 2a: Unified Union for PK-12



Appendices

- Agreement dated June 20, 1989, by and between Vergennes Union Elementary School District #44, Vergennes Graded School District, Waltham School District, and Panton School District
- Merger Study Committee Briefs
- Regional Plan Draft Housing and Population Section Summary of the Addison County Regional Planning Commission (ACRPC), October 4, 2021
- Modified ANWSD and MAUSD Transportation Study Report
- ANWSD Act 46 Outcomes Review
- MAUSD Act 46 Outcomes Review
- ANWSD MAUSD Values, Goals, Criteria Community and Committee Feedback
- Feedback on the Articles - Thought Exchange Summary
- Excerpt from ANWSD's FY21 Audit - Special Revenue Funds as of June 30, 2021
- Excerpt from MAUSD's FY21 Audit - Fiduciary Funds as of June 30, 2021
- ANWSD's *Our District, Our Future: Frequently Asked Questions 2020-2021*

Vergennes City Clerk's Office

Received for record August 18, 1989 at 2:40 P.M. and was
duly recorded in Vergennes Land Record Book #38, on pages 430-444.

Attest:

Joan Devine
Vergennes City Clerk

AGREEMENT

THIS AGREEMENT made and entered into this 20th day of June, 1989, by and between Union Elementary School District No. 44 (hereinafter "Union"), Vergennes Graded School District, ID (hereinafter "Vergennes"), Town of Waltham School District (hereinafter "Waltham"), and Town of Panton School District (hereinafter "Panton"):

W I T N E S S E T H

WHEREAS, the voters of Vergennes, Waltham and Panton at duly warned special meetings on November 8, 1988, voted to form an elementary union school district,

WHEREAS, Union is that elementary union school district,

WHEREAS the provisions of the Final Report dated June 7, 1988, entitled "Joint Agreement for the Formation of the Union School District of Vergennes, Panton and Waltham" approved by the State Board of Education on the 15th day of August, 1988, (hereinafter "Final Report") govern the union district, and

WHEREAS, the parties to this Agreement have made certain agreements respecting the transfer of the Vergennes Elementary School facility from Vergennes to Union, and the payment therefor, as well as provisions respecting payments in the event of the dissolution of Union or the sale of the elementary school facility, which the parties desire to incorporate into this Agreement;

NOW THEREFORE, the parties hereto stipulate, covenant and

OUIMETTE & RUNCIE
ATTORNEYS AT LAW
20 SO. WATER STREET
VERGENNES, VERMONT
(802) 877-3372
(802) 877-3619

agree as follows:

1. Contemporaneously with the execution of this Agreement, Vergennes is conveying by Warranty Deed to Union its elementary school facility as described therein and upon terms and conditions as described therein and in conformance with the Final Report.

2A. The purchase price for the elementary school facility is as follows:

a. Pre 1987 Elementary School - \$1,694,400.00.

b. 1987 Addition to Elementary School -

Bonded indebtedness retired as of 6-30-89 - \$ 90,000.00

Bonded indebtedness remaining as of 6-30-89 - \$ 730,000.00

2B. The Final Report shows the bonded indebtedness for the 1987 Addition retired as of June 30, 1989, to be \$151,250.00, and the bonded indebtedness remaining as of June 30, 1989, to be \$668,750.00. The Final Report figures were premised on the assumption that Vergennes would be making additional bond payments in 1989. The parties have agreed and Union has budgeted to make those payments to Vergennes in 1989. Therefore, the figures in paragraph 2A are the correct figures for the bonded indebtedness remaining and retired as of June 30, 1989.

3. As set forth in the Final Report, Vergennes, Waltham and Panton have been granted equity credit in the Vergennes Elementary School facility reflecting each's participation in

the facility. Equity credit respecting that part of the purchase price represented by the Pre 1987 Elementary School shall be computed using the five year average percentage attendance figures through the 1988-1989 school year. Equity credit respecting that part of the purchase price represented by the bonded indebtedness for the 1987 Addition retired as of June 30, 1989, shall be computed using the percentage attendance figures for the 1987-1988 and 1988-1989 school years. However, in no event shall equity credit exceed a party's share of the purchase price.

4. Vergennes, Waltham and Panton are contributing their equity credit to Union together with Promissory Notes payable to Vergennes in amounts computed as set forth in the Final Report and payable as set forth in the Final Report. Union is using the equity credit and Promissory Notes to pay for that part of the purchase price of the elementary school facility from Vergennes represented by the Pre 1987 Elementary School and the bonded indebtedness for the 1987 Addition retired as of June 30, 1989. The remaining bonded indebtedness for the 1987 Addition shall be paid as provided in paragraph 8 herein below.

5. The amount that Vergennes, Waltham and Panton must contribute to Union to fund that part of the purchase price of the elementary school facility represented by the Pre 1987 Elementary School and the bonded indebtedness for the 1987

Addition retired as of June 30, 1989, is determined by the projected student attendance of each in the union school, projected as of June 30, 1989, at the percent of that projected student attendance to the whole. Projected student attendance for Vergennes, Waltham and Panton, projected as of June 30, 1989, is as follows:

a. Vergennes	68.9477%
b. Waltham	12.1848%
c. Panton	<u>18.8675%</u>
TOTAL	100.00%

6A. The part of the purchase price represented by the Pre 1987 Elementary School is \$1,694,400.00. The contributions that Vergennes, Waltham and Panton must make to Union to fund this part of the purchase price are as follows:

a. Vergennes	\$ 1,168,249.83
b. Waltham	206,459.25
c. Panton	<u>319,690.92</u>
TOTAL	\$ 1,694,400.00

6B. Pursuant to the Final Report, Vergennes, Waltham and Panton have been granted and will contribute to Union equity credit with respect to the Pre 1987 Addition. The amount of equity credit is computed as set forth above as follows:

	<u>Five Year Average Attendance Through 1988-1989</u>	<u>Equity Credit</u>
a. Vergennes	74.5786%	\$ 1,168,249.83

b. Waltham	11.5979%	196,514.81
c. Panton	13.8235%	234,225.38

6C. Waltham and Panton will each contribute to Union Promissory Notes payable to Vergennes to be repaid over a ten year period without interest payable in ten equal annual installments commencing on December 31, 1989, and on the same date each and every year thereafter until such ten annual payments are made. Copies of the Promissory Notes are attached hereto. The amount of each Promissory Note is as follows:

a. Waltham	\$ 9,944.44
b. Panton	\$ 85,465.54

6D. Union shall transfer to Vergennes the equity credits and Promissory Notes referenced above to pay that part of the purchase price represented by the Pre 1987 Elementary School, \$1,694,400.00.

7A. The part of the purchase price represented by the bonded indebtedness for the 1987 Addition retired as of June 30, 1989, is Ninety Thousand Dollars (\$90,000.00). The contributions that Vergennes, Waltham and Panton must make to Union to fund this part of the purchase price are as follows:

a. Vergennes	\$ 62,052.93
b. Waltham	10,966.32
c. Panton	<u>16,980.75</u>
TOTAL	\$ 90,000.00

7B. Pursuant to the Final Report, Vergennes, Waltham and Panton have been granted and will contribute to Union equity credit with respect to the bonded indebtedness for the 1987 Addition retired as of June 30, 1989. The amount of equity credit is computed as set forth above as follows:

	<u>Average Attendance</u> <u>1987-1988 & 1988-1989</u>	<u>Equity Credit</u>
a. Vergennes	74.2753%	\$ 62,052.93
b. Waltham	11.9516%	10,756.44
c. Panton	13.7731%	12,395.79

7C. Waltham and Panton will each contribute to Union Promissory Notes payable to Vergennes to be repaid over a two year period without interest payable in two equal annual installments on December 31, 1989, and on December 31, 1990. Copies of the Promissory Notes are attached hereto. The amount of each Promissory Note is as follows:

Waltham	\$ 209.88
Panton	\$4,584.96

7D. Union shall transfer to Vergennes the equity credits and Promissory Notes referenced above to pay that part of the purchase price represented by the bonded indebtedness for the 1987 Addition retired as of June 30, 1989.

8. The part of the purchase represented by the bonded indebtedness remaining as of June 30, 1989 is Seven Hundred Thirty Thousand Dollars (\$730,000.00). Union shall pay this part of the purchase price by making capital payments to

Vergennes on or before November 1 of each year from 1989 through 2006 in an amount equal to the principal obligation of Vergennes due to its bond holders on the following December 1st under its 1986 series bonds issued through the Vermont Municipal Bond Bank. Union shall further make interest payments to Vergennes on or before November 1 of each year from 1989 through 2006 and on or before May 1 of each year from 1990 through 2006 in an amount equal to the interest obligation of Vergennes due its bond holders on the following December 1st (in the case of the payment due on or before November 1) and in an amount equal to the interest obligation of Vergennes due its bond holders on the following June 1st (in the case of the payment due on or before May 1) under its 1986 series bonds issued through the Vermont Municipal Bond Bank. Vergennes may direct that Union make these payments directly.

9. As set forth in the Final Report, Union shall allocate capital payments and operating expenses among Vergennes, Waltham and Panton on a per pupil basis, using the enrollment of legal pupils who are residents of Vergennes, Waltham and Panton as of October 15th of the preceding year. Such capital payments and operating expenses shall be separately stated in each annual assessment. "Enrollment" for the purposes of this Agreement means legal pupils who should be attending grades kindergarten through sixth grade at public

expense. Capital payments by Union to Vergennes set forth in paragraph 8 above respecting the principal of the bond indebtedness for the 1987 Addition remaining as of June 30, 1989, shall be assessed to Vergennes, Waltham and Panton as capital payments; payments respecting interest shall be assessed as noncapital payments.

10. Contemporaneously with the execution of this Agreement, Vergennes is conveying by Warranty Deed to Union its elementary school facility as described therein. The Warranty Deed provides that the conveyance is to Union for so long as Union shall not be dissolved. In the event that Union shall be dissolved, the lands and premises conveyed in the Warranty Deed automatically revert to Vergennes or its successors without it being necessary for Vergennes or its successors to take any affirmative action whatsoever to effectuate the reverter. In the event that a reverter occurs because of the dissolution of Union, Vergennes shall pay to Waltham an amount equal to the sum of all capital payments assessed by Union to Waltham and paid by Waltham in the annual assessments made by Union to Waltham after July 1, 1989. No interest shall be included in the payment. In the event that a reverter occurs because of the dissolution of Union, Vergennes shall pay to Panton an amount equal to the sum of all capital payments assessed by Union to Panton and paid by Panton in the annual assessments made by Union to Panton after

July 1, 1989. No interest shall be included in the payment. In such event, the Promissory Notes referenced hereinabove made by Waltham to Vergennes, copies of which are attached to this Agreement, shall become immediately due and payable in full, and Waltham shall make immediate and full payment of all sums due under the Promissory Notes to Vergennes. In such event, the Promissory Notes referenced hereinabove made by Pantan to Vergennes, copies of which are attached to this Agreement, shall become immediately due and payable in full, and Pantan shall make immediate and full payment of all sums due under the Promissory Notes to Vergennes.

11. In the Warranty Deed above referenced Vergennes is conveying by Warranty Deed to Union its elementary school facility as described therein for so long as Union shall make the payments respecting the bonded indebtedness remaining as of June 30, 1989, as set forth in and required by paragraph 8 of this Agreement. In the event that Union shall not make said payments, the lands and premises therein conveyed shall automatically revert to Vergennes or its successors, without it being necessary for Vergennes or its successors to take any affirmative action whatsoever to effectuate the reverter. In the event such a reverter occurs, Vergennes shall have no obligation to make any payments whatsoever to Union, Waltham or Pantan.

12. In the event that no reverter has occurred as set

forth in paragraph 10 and paragraph 11 hereinabove, Union may sell, convey, transfer or otherwise dispose of the elementary school facility conveyed in the Warranty Deed above referenced, provided that payment shall be made as follows:

- a) There shall be paid to Vergennes an amount equal to the remaining principal and accrued unpaid interest on its 1986 series bonds issued by the Vermont Municipal Bond Bank.
- b) There shall be a payment to Vergennes of One Million Six Hundred Ninety-Four Thousand Four Hundred Dollars (\$1,694,400.00).
- c) There shall be a payment to Waltham in an amount equal to the sum of all capital payments assessed by Union to Waltham and paid by Waltham in the annual assessments made by Union to Waltham after July 1, 1989.
- d) There shall a payment to Panton in an amount equal to the sum of all capital payments assessed by Union to Panton and paid by Panton in the annual assessments made by Union to Panton after July 1, 1989.
- e) Upon sale, conveyance, transfer or other disposition, and upon payments made as set forth above, the reverter interests of Vergennes or its successors set forth in paragraph 10 and paragraph

11 above shall be extinguished, and Vergennes or its successors shall execute a Quitclaim Deed confirming the same. Upon receipt of the payments as set forth above, Waltham and Panton shall execute appropriate releases.

- f) A sale, conveyance, transfer or other disposition where payment is not made as set forth above shall be deemed to be equivalent to the dissolution of Union Elementary School District No. 44. Thereupon the lands and premises conveyed in the Warranty Deed above referenced shall automatically revert to Vergennes Graded School District, ID, or its successors, without it being necessary for Vergennes Graded School District, ID, or its successors, to take any affirmative action whatsoever to effectuate the reverter. In the event that a reverter occurs under this paragraph, Vergennes Graded School District, ID, or its successors, shall make the payments to the Town of Waltham School District and to the Town of Panton School District and receive the payments from the Town of Waltham School District and from the Town of Panton School District as set forth in paragraph 10 of this Agreement.

13. This Agreement is executed in quadruplicate each to be treated as an original, as of the day and year first above

written.

VERGENNES GRADED SCHOOL
DISTRICT, ID

By: Linda M. Thompson L.S.
Linda Thompson, Chairperson

By: Craig L. Miner L.S.
Craig Miner, Clerk

By: Clare S. Evancie L.S.
Clare Evancie
VERGENNES PRUDENTIAL COMMITTEE

UNION ELEMENTARY SCHOOL
DISTRICT NO. 44

By: Rae Holzschuh L.S.
Rae Holzschuh, Chairperson

By: Linda M. Thompson L.S.
Linda Thompson, Clerk

By: Craig L. Miner L.S.
Craig Miner

By: Judith Coen L.S.
Judith Coen

By: Stephen P. Coulman L.S.
Stephen Coulman
BOARD OF SCHOOL DIRECTORS

TOWN OF WALTHAM SCHOOL DISTRICT

By: Stephen P. Coulman L.S.
Stephen Coulman, Chairperson

By: Susan Heath L.S.
Susan Heath, Clerk

By: Robert G. Brash L.S.
Robert Brash
BOARD OF SCHOOL DIRECTORS

-13-

TOWN OF PANTON SCHOOL DISTRICT

By: *Pamela Farnsworth* L.S.
Pamela Farnsworth, Chairperson

By: *Kathryn Brooks* L.S.
Kathryn Brooks, Clerk

By: *Rae Holzschuh* L.S.
Rae Holzschuh
BOARD OF SCHOOL DIRECTORS

OUIMETTE & RUNCIE
ATTORNEYS AT LAW
20 SO. WATER STREET
VERGENNES, VERMONT
(802) 877-3372
(802) 877-3619



ANWSD / MAUSD Merger Study Committee
Tuesday, August 17, 2021
Meeting Brief

The ANWSD/MAUSD Merger Study Committee's first official meeting focused on establishing a strong foundation of the committee's work. The committee reviewed their charge, committee and staff roles and responsibilities, and a draft timeline for the committee's work. The committee recognized that given the importance of its work and the need for a thorough, thoughtful process the work may need to extend beyond the targeted timeline in the charge.

Committee Charge: "ANWSD & MAUSD agree to form a study committee (per 16 VSA ss706) to analyze the advisability of forming a union school district. The Committee's work ideally will be completed within a timeframe that will allow a vote on a proposed plan by Town Meeting Day 2022"

The committee also discussed the importance of keeping the community apprised of its work and engaging the community in the process, and specifically including students. Upcoming committee work will include study of governance structures and options, developing an understanding of the current realities and future trends, developing plans for community engagement, and establishing criterion and considerations for evaluating options to ultimately make a recommendation regarding the advisability of forming a union.

Committee members emphasized the importance of approaching their work objectively and ultimately ensuring they make a good informed recommendation.



ANWSD / MAUSD Merger Study Committee
Tuesday, August 31, 2021
Meeting Brief

The Merger Study Committee continued work to understand the key variables for a merger study in the ANWSD and MAUSD context. The Committee reviewed recent census data and developments in the region and heard from representatives of both districts about the context for the requested merger study. The Committee also worked to develop a shared understanding of school governance structures including school districts, union school districts, supervisory unions, and supervisory districts. Committee members worked to increase clarity and ask questions. Finally, the Committee began an exploration of values and priorities which the Committee hopes will assist with evaluating future governance possibilities and making a recommendation to the communities of ANWSD and MAUSD in the future.



ANWSD / MAUSD Merger Study Committee
Tuesday, September 21, 2021
Meeting Brief

To provide clarity for the communities of ANWSD and MAUSD and to allow the committee to ensure its work is thoughtful and thorough, the committee formally acted to set November 2, 2022 as the anticipated date for any vote on the formation of a union, if so recommended by the Committee.

The committee designated members to post committee meeting briefs and agendas on Front Porch Forum to assist everyone with easy access to current information about the study process.

A "[Questions and Answers" resource](#) was reviewed. This resource will be updated as new questions and answers emerge and it along with other Merger Study materials can be accessed at [ANWSD's Merger Study Committee webpage](#) or via [MAUSD's Merger Study Committee webpage](#).

The committee continued to refine and discuss values, goals, and considerations for decision-making and planning. The committee's use of Restorative Circles for discussions has supported openness and honesty, and the committee is considering using a similar process to support community engagement and discussion.

At upcoming meetings, in addition to community engagement circles, the committee will be looking at housing data and the impacts of Act 46-related changes on ANWSD and MAUSD. Work is also beginning to project tax rate and enrollment projections.

Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday (at VUHS) and the third Tuesday (at MAUHS) of each month at 6:30pm.



ANWSD / MAUSD Merger Study Committee
Monday, October 4, 2021
Meeting Brief

The ANWSD/MAUSD Merger Study Committee wants to hear from you! Mark your calendars for the evening of Monday, November 1 at VUHS and Tuesday, November 16 at MAUHS. All are welcome to attend one or both. Your feedback will help inform decision-making considerations for the study committee's work and will build upon the committee's discussion of values, goals, and considerations for decision-making. Look for more details on opportunities to share your voice soon!

Committee member Kevin Hansen assisted the committee with a review of important information regarding [housing and population trends in the region](#). Because total population and housing trends impact school enrollment, the committee found this information very helpful. In short, the total population, and thus enrollment, cannot expand until a regional housing shortage is addressed. Key considerations for addressing housing needs include addressing zoning and infrastructure needs (water and wastewater, for example), promoting suitably sized housing for smaller households, and housing stock that is energy efficient and has manageable maintenance costs. It may take a decade or more to address these needs and begin to impact the regional population, and thus see increases in school enrollment.

The Committee also reviewed information regarding the early outcomes of the Act 46 mergers in ANWSD and MAUSD. In both cases, an overwhelming majority of the possible positive outcomes of merging have materialized, from the capture of cost savings to improved curriculum coordination. Committee members noted that for areas such as curriculum coordination, much has been accomplished, but there is much more that can be gained as the collaborative work continues.

The Committee's draft work plan has been extended per the decision to target November 2022 for a vote, if recommended. The Committee is enthused to use this time to continue to conduct a thoughtful and thorough study.



ANWSD / MAUSD Merger Study Committee
Tuesday, October 19, 2021
Meeting Brief

UPDATED SAVE THE DATE: The ANWSD/MAUSD Merger Study Committee wants to hear from you! Our plans have changed and we will be offering a virtual event on Tuesday, November 16 from 6:30-8:00 pm. All are encouraged to join! Your feedback will help inform decision-making considerations for the study committee's work and will build upon the committee's discussion of values, goals, and considerations for decision-making. Look for more details and information about registering soon!

The Committee received an excellent presentation from Elizabeth Jennings, Director of Finance and Operations for ANWSD, and Floyd Davison, Business Manager for MAUSD projecting future budget and education tax rate trends into the future for the current separate union districts, and a merged union school district structure. The projections show sharply rising local education tax rates in both the current and a merged, union school district model, with the steepest rises beginning in FY26 and continuing through FY27, the last year of the modeling. The projections further show lower increases in tax rates in the merged union school district model through FY26, with little difference in tax rates in FY27. The assumptions behind the model drew from past trends and the best available information about future possibilities. The projections will change as variables behind tax rates materialize over time, however, the projections paint a reliable picture of the trends that can be expected based on current information.

The Committee also heard from Senator Ruth Hardy on a legislative task force studying regarding pupil weighting. For the purposes of calculating local tax rates, pupils are weighted to account for the estimated amount it might cost to educate different types of students, such as those in poverty, or in high school. This weighting generates the Equalized Pupils count, which is part of the education tax rate formula. While changes are likely, the specific changes are not yet clear but may have a slightly negative impact on tax rates in the region. Committee members note that this could have an even greater negative impact due to declining enrollments. Senator Hardy offered to return to update the committee as the task force proceeds to recommendations and modeling. The Committee expressed gratitude for Senator Hardy's expertise, thoughtfulness, and perspective on future possibilities in the education tax rate formula and education funding more broadly.

Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday (at VUHS) and the third Tuesday (at MAUHS) of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Monday, November 1, 2021
Meeting Brief

PLEASE "MEET" AND SHARE YOUR THOUGHTS: The ANWSD/MAUSD Merger Study Committee wants to hear from you! All are encouraged to join! Your feedback will help inform decision-making considerations for the study committee's work and will build upon the committee's discussion of values, goals, and considerations for decision-making.

When? Tuesday, November 16, 2021 • 6:30-8:00pm

Where? Online. Pre-Registration is required.

Register in advance: <https://bit.ly/3vznbFX>

After registering, you will receive a confirmation email containing information about joining the meeting.

Who? Everyone!!! Parents, students, residents with no children in school, Everyone!

We finalized our planning for this event at our meeting and are really looking forward to hearing from a broad spectrum of stakeholders.

In addition, the Committee received a comprehensive presentation from Tim Ammon of Decision Support Group regarding options for school bus transportation for merged middle and high schools. [The presentation](#) illustrated the complexity and significance of school bus transportation, and led to discussion about priorities for students, families, school schedules and more. This will be an area of further review as part of the study process.

The Committee also explored the cost considerations for formation of a supervisory union comprised of multiple school districts, such as a merged middle and high school district. The Committee discussed the potential challenges and benefits of that option. The Committee expects to select a preferred merged governance option in December.

Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday (at VUHS) and the third Tuesday (at MAUHS) of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Monday, November 1, 2021
Meeting Brief

Thank you for sharing your thoughts on the future of education in the region. Over 120 people attended the virtual community meeting on November 16, 2021, and over 200 people completed the online survey. Feedback on the event was overwhelmingly positive! The Committee began a review of the feedback received and will continue their work to synthesize what was shared at the next meeting, December 21, 2021.

A presentation on educational challenges and opportunities in light of the projected enrollment declines for the next 5 years was provided by Shannon Warden, Principal of Mt. Abraham Union Middle and High School, and Gabe Hamilton, Director of Learning for Addison Northwest School District. The Committee learned more about the pros and cons of merged schools for students in the upper grades through the lenses of enrollment, staffing, programs, and class sizes. Committee members discussed the opportunities, challenges, and mission of the education system.

The Committee discussed the governance options and resolved that going forward, the study will model and analyze the unified union structure.

Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday (at VUHS) and the third Tuesday (at MAUHS) of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Tuesday, December 21, 2021
Meeting Brief

The Committee is listening. First and foremost, the committee has heard concerns about changes being forced. To be clear, if the committee recommends a merger, you decide! The committee's job is to recommend a merger, or not. If the committee recommends it, then the electorate votes to approve, or not, the recommended merger. A merger can only happen as an outcome of this study process with voter support.

The committee hopes to address additional misconceptions in the coming months, for example, some believe that some school facilities are in need of significant repair and some facilities debt may be unreasonable. Neither of these are accurate. Facilities in ANWSD and MAUSD are well maintained, and both systems invest annually in their capital needs, through repayment of prudent bond financing or dedicated allocations in the budget. Expect more information about school facilities later this winter.

Also in the spirit of listening, the committee spent additional time reviewing key points from November's community engagement event. Themes emerged around support for programs, both academic and extracurricular, relationships, transparency, and more. The committee will continue to reflect on community feedback as the study process continues.

What's in a name? A name for a possible new unified union district should be included in the study report and articles of agreement. If a new district is formed, it is important to start with a name that will last for legal and financial purposes. A name can also help build a positive, regional identity. The committee began a discussion about community input for selection of a name, including from students. Again, expect more on this in the coming months.

Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday (at VUHS) and the third Tuesday (at MAUHS) of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Monday, January 3, 2022
Meeting Brief

The ANWSD/MAUSD Merger Study Committee feels their members are a good representation of the views of people in the region. At the January 3, 2022 meeting, committee members wrestled with some of the hard things that people feel strongly about, like school closures, grade configurations of schools, and school of attendance, if a merger were to occur. Committee members explored the pros and cons of options, shared thoughts, and concerns, raised issues, and expressed hopes for the future. The Committee will continue work on these topics, including on more specific language for the draft articles of agreement in future meetings.

The Committee also refined language for other required articles and continued discussions on the sale/or disposal of school district property.

The Committee received public comment in writing and at the meeting, which addressed community member's and community groups' feelings about the merger student process and school closure. Some also had questions about the Committee's process and work more generally, so it seems like a good time to reiterate some basic information:

- The Committee's charge is to recommend, or not, the formation of a merger to the electorate of ANWSD and MAUSD. This process is outlined in statute, 16 VSA § 706b, and the Committee must work within the parameters of the charge and the law.
- The decision of whether or not to merge, if recommended by the Committee and approved by the Vermont State Board of Education, is made by you, the voters. The Committee is using November 2022 as the proposed date of a vote for planning purposes.
- After considerable study and discussion, and to complete its charge, the Committee is developing Articles of Agreement for a Unified Union Supervisory District, which would be formed by a merger of ANWSD and MAUSD. Once modeled, the Committee will decide whether or not to recommend this option to voters for their approval, or not. Again, the decision as to whether or not the merger happens and the Articles are approved, is made by voters.
- Other ideas and options for the future of the schools and education in the region are the responsibility of the existing boards of ANWSD and MAUSD. The Committee is following ANWSD and MAUSD Boards' work closely as part of the merger study process.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Tuesday, January 18, 2022
Meeting Brief

The ANWSD/MAUSD Merger Study Committee is made up of parents, teachers, community members, board members, who care deeply about the future of our schools. We are giving our time and working in full view of the public because we care deeply about our children, towns, and future. This is important, difficult and complicated work. We know that people feel strongly about the possibility of the formation of a union and the way that possibility is framed. We are using our heads and our hearts as we tackle our charge.

To allow the Committee to learn more about options for addressing reducing enrollment studied in MAUSD, and to accommodate calendar challenges in February and March, the Committee has made some changes to upcoming meeting dates. Through the end of March:

- Committee members will attend the [MAUSD Board's regular meeting on January 25, 2022](#) to hear a presentation from Nate Levinson and learn more about MAUSD's [New Solutions K12](#) report.
- February 7 is a regular Committee meeting.
- February 14 Committee meeting is canceled.
- March 7 is a regular Committee meeting.
- March 14 meeting is rescheduled to Wednesday, March 23.

Specific agendas and meeting information will be posted prior to each meeting.

At the January 18 meeting, the Committee continued its review of the required and some optional articles of agreement. The Committee is working to frame the big picture for articles of agreement before refining specific language. The Committee reviewed language for key dates and explored potential ways to comprise a new Board. This is ongoing work and committee members are focused on gathering information to help in its work. The Committee plans to discuss incorporation of language regarding school closures in the future, and has heard from several community members on this, as well as other topics, via email and public comment. The Committee understands that many community members feel strongly about this and other topics.

Options for considering additional pathways for collaboration between ANWSD and MAUSD were also discussed. A proposal to form a task force of the Committee on this was made, but not taken up by the Committee. Committee members highlighted relevant statutes for the Committee's work, 16 VSA § 706(b), and the Committee's charge. The Committee plans to discuss options for collaboration after learning more about the findings in MAUSD's New Solutions K12 study, and outreach to ANWSD and MAUSD boards.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Monday, February 7, 2022
Meeting Briefs

Please note that the upcoming meeting schedule is as follows:

- The February 15 Committee meeting is canceled.
- March 7 is a regular Committee meeting.
- The March 14 meeting is rescheduled to Wednesday, March 23.

Specific agendas and meeting information will be posted prior to each meeting.

The Committee discussed MAUSD's New Solutions K-12 report at a high level. The Committee explored different perspectives and noted several alternatives to a merger analyzed in the study did not meet the criteria established through a community input process, including closing schools and tuition students, and that many people value MAUHS highly and do not support high school closure. Given the report focused primarily on MAUSD, the Committee is seeking feedback from ANWSD on the report and on ANWSD's explorations of options to address enrollment and tax rate challenges while advancing goals for student learning. Superintendent Reen is also following up with the study team on areas where clarification might be helpful and the generalizability of findings to ANWSD. The discussion will continue at a future meeting.

The Committee also learned about what a multi-year transition to a merged district might look like. Possible articles, required and optional, related to transition and operations after the formation of a new district were discussed briefly and will be revisited in more depth at future meetings.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Monday, March 7, 2022
Meeting Brief

Please note that the upcoming meeting schedule is changed: The March 14 meeting is rescheduled to Wednesday, March 23. The agenda and meeting information will be posted prior to the meeting.

The Committee continued work to understand the context for a merger. This included an update from the ANWSD boards about their perspectives and work to explore alternatives to the merger option being studied by the committee, the latest information on MAUSD's New Solutions K-12 report, resources regarding the improved state of MAUSD facilities ([MAUSD Building Improvements Video](#)), and Town Meeting Day decisions.

The committee then spent significant time walking through draft articles of agreement related to the first year of operations of a new district. These draft articles related to transportation, collective bargaining agreements and contracts, students' school of attendance, and curriculum. The committee also reviewed draft articles on community involvement, a preference for a supervisory district structure, the voting process, and the counting of ballots. Committee members discussed options for each and identified additional resources needed and areas where additional community input could be helpful in finalizing each article.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Wednesday, March 23, 2022
Meeting Brief

Future meetings of the ANWSD/MAUSD Study Committee will return to a hybrid model, with a mask-friendly, in-person meeting alternating between VUHS and MAUSD and the option for virtual attendance for anyone who prefers that option. The next meeting of the Committee will be on April 4, 2022, at 6:30 pm at VUHS.

The Committee is planning to develop a comprehensive draft of articles, then seek feedback on the draft articles from stakeholders from across the ANWSD and MAUSD region. The Committee gave preliminary approval to draft articles on Transportation of Students; Assignment of Staff, Collective Bargaining Agreements; Contracts; Curriculum; Disposal of Real Estate; Forming Entities Cease to Exist; Board of Directors During Transition; Votes on Budget and Other Public Questions; Preference to Operate as a Supervisory District; and Community Involvement.

The Committee discussed communications from community members regarding school closure and noted the different perspectives on the issue across the region. Further discussion of options for addressing school closure will be on the agenda for the April 4 meeting.

The Committee also discussed options for school board configuration, including board size, and strategies for representation and proportionality for a merged district. The Committee also identified questions for further study and will continue their work to explore options on school board configuration at the April 4 meeting as well.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee

Monday, April 4, 2022

Meeting Brief

The Committee was pleased to return to an in-person, mask-friendly meeting format with a virtual option for those who prefer. For the next meeting, please note that the upcoming meeting schedule is changed: The April 19 meeting is rescheduled to Wednesday, April 27. The agenda and meeting information will be posted prior to the meeting.

While the final details of changes to the pupil weighting formula are still pending, the Committee heard from Superintendents Reen and Soule that local projections of the impact based on more current, local data are concerning. The Committee will continue to monitor developments closely. An update on the changes to pupil weighting and the tax rate calculation will be on the agenda for every meeting for the foreseeable future. The ability to sustain and grow opportunities for students in the region is one of the key reasons a merged district is being considered, so future tax rate projections are very important for planning and decision-making.

The Committee continued its work to draft articles of agreement and reached a preliminary agreement on language related to the school of attendance for students and within-district school choice for the first year of operations of the district.

The Committee also discussed options and the implications for board representation for the new district board, if formed. The Committee discussed the importance of representation, equity, and diverse perspectives in the proposed board governance structure. The Committee agreed upon a board of 15 members, with proportionate representation by town and weighted voting. The Committee plans to seek feedback from community members on this and all other articles before finalizing the articles of agreement and report and making a recommendation to form, or not, a new unified union school district.

And finally, the Committee discussed possible provisions related to the closure of schools. A variety of perspectives and considerations were shared by committee members. The Committee discussed the importance of sustaining or expanding opportunities at the middle and high school levels, including possibly grades 5 and 6, as an outcome of the formation of a unified union school district. Ultimately the Committee voted in favor of working further on draft language that clarifies the process and criteria for ensuring that elementary schools (excluding grades that may be incorporated in improving opportunities at the middle school level) are supported to meet student's academic needs at a reasonable cost before other strategies such as reconfiguration, consolidation or closure can be implemented. The Committee plans to continue work on this language at their April 27 meeting.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee

Wednesday, April 27, 2022

Meeting Brief

Supporting and protecting all of the schools of ANWSD and MAUSD is a priority for all members of the Merger Study Committee. The Committee spent much of the most recent meeting discussing possible language for the Articles of Agreement that would provide assurance to community members that elementary schools would remain open and be supported to offer efficient, comparable, high-quality educational opportunities while allowing flexibility for a future board and communities to respond in an uncertain future. After much discussion, the committee informally agreed to principles that provided for a vote of the towns in the first four years, and a vote of $\frac{2}{3}$ supermajority of the district after the initial 4-year period, before closing a school. The committee is also considering the advisability of a $\frac{2}{3}$ majority of the board for closing a school. Committee members emphasized these provisions would ensure that the dedicated work to support equity in learning opportunities and cost-effective principles would take place well before the unlikely and hopefully unneeded question of school closure is raised. It is expected that enrollment at the elementary school level will remain stable through 2030, but there is a significant decline in middle/high school enrollment anticipated.

The Committee also discussed the importance of creating a structure that would enable combining middle and high schools, and expanding grades served at the middle school level. Due to the expected decline in enrollment at the middle and high school levels, increased collaboration is needed to sustain and hopefully expand opportunities for students while slowing property tax rate increases. Draft language for "Supporting and Protecting Community Schools" that addresses these considerations will be reviewed at the May 2, 2022 meeting, and the Committee will be seeking feedback from all community stakeholders.

Draft articles that provide for a 15-member board with representatives from all towns and weighted voting were given preliminary approval by the Committee.

The Committee plans to seek feedback on the draft Articles of Agreement from community stakeholders and will be discussing a process for this at the May 2, 2022 meeting. Please look for more information on options to learn about the draft articles and share your thoughts soon!

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee

Monday, May 2, 2022

Meeting Brief

We did it! The Merger Study Committee completed a draft Articles of Agreement for a possible Unified Union School District. The Committee is now seeking feedback. Look for opportunities to learn more and share your thoughts about the strengths and areas you'd like to see changed in the draft Articles between the Committee's May 17 and June 6 meetings. Your feedback will be used to revise the Articles and inform the Committee's report.

After considering stakeholder feedback, the Committee will review the pros and cons of forming a union per the Articles of Agreement and will recommend, or not, that the question goes to the voters of ANWSD and MAUSD. If recommended, the Committee would anticipate sending its report and recommendation to the Vermont State Board of Education by July and scheduling a vote for Election Day, November 8, 2022.

The Committee spent a lot of the meeting time discussing the importance of supporting and protecting community schools and also allowing for expanded opportunities to support middle and high school students given continuing declines in enrollment. Draft language for "Supporting and Protecting Community Schools" was carefully crafted by the Committee and says that an elementary school cannot be closed without a vote of the town for the first 4 years. After 4 years, an elementary school can only be closed with a $\frac{2}{3}$ majority vote of the new Board and a $\frac{2}{3}$ majority vote of the new District. This language ensures that time and effort will go into supporting strong community elementary schools, that there would be time for thoughtful decision-making, and that individual towns to respond if needed, but also provides a mechanism to enable the new district to respond to unforeseen future circumstances to best provide for all students.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email Committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee

Monday, June 6, 2022

Meeting Brief

Thank you for your feedback! In the past 3 weeks, the Merger Study Committee reached out to our school boards, faculty, staff, students, and communities to get feedback on the draft articles of agreement. We held virtual and in-person meetings, visited schools, and shared the opportunity to participate in a discussion using Thought Exchange.

[Summary of Thought Exchange Feedback](#)

[All Thoughts](#)

Based on your feedback, the Committee revisited the language in the [DRAFT Articles of Agreement](#) related to Protecting and Supporting Community schools, which addresses how decisions about school closures could be made. Clearly, this is an important issue and committee members continue to weigh options and implications thoughtfully. In the end, the committee did not make changes to the proposed article and will review the school closure language in recently passed legislation at our next meeting to consider again if the language should be changed. New legislation recently passed includes a moratorium on school closures for two years in new union school districts.

We also heard your requests for more information and your questions. In the coming weeks, we will work to provide additional information and answers in the Study Report and in our [Questions and Answers](#) resource. Stay tuned!

The Committee discussed Starksboro and Lincoln. The Committee co-chairs will attend an upcoming MAUSD School Board meeting to be scheduled with Starksboro representatives regarding the possible termination of Starksboro's withdrawal process in light of the language in the Articles of Agreement. Committee co-chairs can support the conversation by providing information about the article, considerations, and process. The committee also agreed to continue to include Lincoln as an advisory district in the Articles of Agreement absent a request by Lincoln to not be included as an advisory district. Because of the State Board of Education Order forming the Lincoln School District, Lincoln residents cannot vote as part of MAUSD on the question of whether or not ANWSD and MAUSD form a union. But, the Lincoln School District voters may vote to join per the terms in the Articles of Agreement, or not, if a new union district is formed.

Over the next few months, the Committee will:

- Provide an update on the committee's work to date to the Vermont State Board of Education at their June meeting;

- Review the pros and cons of forming a new union school district as compared to continuing in the status quo;
- Decide to recommend, or not, a vote on whether or not to form a new union school district; and, if yes,
- Complete and present the Committee's Report and Recommendation to the Vermont State Board of Education at another meeting this summer.
- Possible vote: November 8, 2022

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email Committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.



ANWSD / MAUSD Merger Study Committee
Tuesday, June 21 & Monday, June 27, 2022
Meeting Brief

The Committee continues to work to stay up to date on important information that impacts the Committee's work:

- The committee discussed components of [H.727, or Act 176 of 2022](#), which is the new law regarding the formation of union school districts.
- The Committee reviewed feedback from students on the draft articles of agreement, which was parallel to the overall feedback, but also highlighted the importance of student voice in planning and decision-making that affect the day-to-day student experience, and the importance of school culture overall.
- The Committee discussed the feedback from the State Board of Education following a joining presentation by the Committee, MAUSD, and ANWSD. The State Board was appreciative of the hard work of the committee, including efforts to engage stakeholders in the process., the video, and the information about the context within the region for their upcoming decisions about supervisory union services in the coming months. The Board also expressed support for including Lincoln as an advisory district, giving Lincoln voters an option to join and access efficient supervisory union services. within the region.
- Starksboro's Selectboard indicated they did not intend to terminate the withdrawal process.
- The Secretary of Education indicated that his recommendation regarding supervisory union services will be based on what brings stability to the region, which would include forming a supervisory union, especially if Starksboro's withdrawal is approved by voters of other towns.

The Committee discussed the implications of a supervisory union structure at length. Members noted that this is one way that decisions about individual towns within a district have a big impact on the other towns in the district. Ultimately, regardless of the composition of the supervisory union, it would reduce the cost efficiencies that could be achieved, decrease the transparency of governance, and create inequitable representation and no direct vote by citizens over a large portion of the budget. The Committee noted that these challenges were the same, whether or not the formation of a new union school district was achieved. And, a union school district combining ANWSD and MAUSD could still achieve the outcomes desired for students, sustained and enhanced learning opportunities, especially at the middle and high school levels.

The Committee approved articles of agreement for the proposed new union school district, Addison North School District, and discussed the pros and cons of a union, comparing the projections for the future if a union is formed as compared to a future continuing with the

status quo. In the end, after months of study and discussion, the committee recommended that the formation of a union school district, merging ANWSD and MAUSD, be advanced to the State Board of Education and voters of ANWSD and MAUSD. Committee members emphasized that the formation of a union was the best path forward to ensure that students, especially at the secondary level, continued to have the needed and desired learning opportunities and extracurricular activities while leveraging efficiencies to mitigate property tax rate increases. Many committee members simply put it this way, "We are stronger together."

The Committee approved the study report and recommendation. The report, including articles of agreement, and supporting materials will be available on the [ANWSD](#) and [MAUSD](#) websites. The recommendation and resort are expected to be considered by the Vermont State Board of Education in July. The final decision about whether or not to form a new union school district between ANWSD and MAUSD will be made by the voters of both districts on November 8, 2022.

To learn more, please review prior meeting briefs, minutes, or meeting recordings which are available on the [ANWSD](#) and [MAUSD](#) websites. Please feel free to email Committee members with comments and join us in person or via zoom at our meetings, on the first Monday and the third Tuesday of each month at 6:30 pm.

Addison County Regional Planning Commission (ACRPC) Regional Plan Draft Housing and Population Section Summary

The following is a summarization of the Housing and Population Section draft update with sections excerpted word for word as well as summarized.

The ACRPC regional plan Housing and Population section considers that age distribution, household size, housing stock, and income are all factors that determine a region's housing needs and informs future planning.



Figure 1: Addison Region Towns and Populations

According to the U.S. Census, 2019 American Community Survey (ACS) the Addison County Region had a total population of 36,215 in 21 municipalities ranging in size from 164 individuals in Goshen to 8,661 in Middlebury. The region's four most populated municipalities – Middlebury, Bristol, Ferrisburgh and Vergennes – account for approximately 48% of the total population. Each of these communities is connected to a thriving downtown or village center that has supported its population over time. Middlebury, the county seat, is a commercial, institutional, and cultural hub of the region, with a population twice that of the next largest town, Bristol (population 3,896).

Approximately half of the population of Bristol lives in its village center, a compact, mixed-use grid of walkable streets, and the rest in the surrounding countryside. Ferrisburgh's 21 miles of Lake Champlain shoreline and its proximity to Chittenden County and Burlington contribute to its population total (population 2,725) which is very similar to Vergennes' total (population 2,596). Vergennes now serves as a regional commercial and employment base for the surrounding towns.

The eastern mountain towns and small central farming communities have the lowest populations in the region. Western farming towns are slightly more populous due to vacation and second homes on the shores of Lake Champlain.

When planning for the future, it is important to understand the components of population change. Population change is typically attributed to two factors:

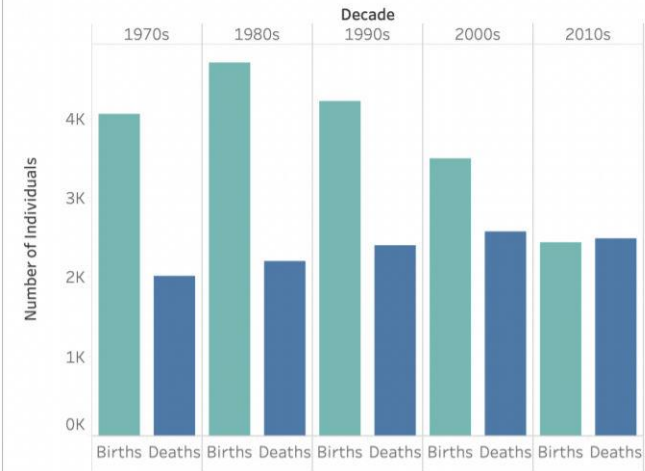
- net natural increase or decrease (the difference between births and deaths) and
- net migration (the difference between in-migration and out-migration)

Natural Increase

In the decades from 1970 to 2000, nearly all towns in the region experienced a net natural increase with more births than deaths. Over the same period, most towns saw more people moving into town than moving out, net in-migration.

In the 1970s, growth occurred due to in-migration and in the 1980s, it was a high level of births that drove the population's natural increase. During the 1990s, the two forces were evenly paced, resulting in a steady population increase of 9.2%. Starting in the 2000s, however, as the populace began to age out of childbearing years, the birth rate began to decline and population growth began to stagnate. The stagnation of population growth is not unique to the Addison Region. In each year since 2016, the state as a whole has recorded more deaths than births, resulting in a negative “natural rate of increase.” This could be the first time this has occurred in Vermont’s history. In 2018, there were 294 births in the Addison Region, while in the same year 342 deaths.

Figure 6: Trends in Births and Deaths Across Addison (1970-2018)
Source: VT Vital Statistics



Migration

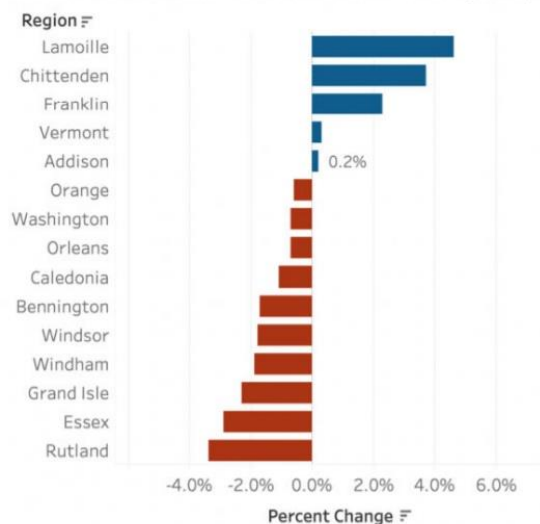
Between 2010 and 2019, more people have moved out of Vermont to other areas than moved into the state. In 2018, about 700 more people left the state than arrived, in 2015 net outmigration sometimes exceeded 2,000 each year. Research suggests that Vermont is losing its working-class and middle-class residents, families and individuals with low and moderate incomes. Outward migration was particularly high among 45- to 64-year-olds earning \$25,000 to \$75,000.

Population Projections

The current population of the Addison Region is significantly lower than previously projected. In 2000, the Addison Region’s population was 35,289, with an expectation that it would increase to 42,564 by 2020.¹⁶ However, according to the 2017 American Community Survey, the population has increased by only 1,536 people to 36,825. Population projections assume that conditions that occurred in the past will continue into the future, such as mortality, birth and migration rates. Using 5-year, age cohort census data (i.e., 35-39 or 40-44-year olds), projections can be calculated by factoring known mortality and migration rates. Certain assumptions are made regarding these projections, such as advances in healthcare resulting in lower death rates. Some changes, however, cannot be predicted, such as the following.

- Changes in the birth rate from social change different than what has occurred,

Figure 5: Population Change in Vermont Counties
Source: Vermont State Data Center - American Community Survey



- Changes in healthcare practices or epidemics that could affect the mortality rates,
- Changing economic conditions that result in shifts in national (international) migration,
- Changes in national immigration policies.

Interestingly, as of 2020-21, some of the above ‘changes’ are occurring and affecting the ability to calculate population projections for the Addison Region.

Covid-19 Pandemic *In the short term, Vermont’s relative stability and low infection rate have driven an increase in-migration to the state, as those in nearby cities seek safer residence. The long-term implications of this shift remain to be seen. According to preliminary survey responses, 64% of recent arrivals fit into a demographic that the state, in its own efforts to attract residents, has been targeting: people who are still in the workforce. Data from 222 responses shows that 40% of the new arrivals are under 35, 24% are ages 36 to 50, and 35% are 51 and older. About half of the new remote workers have completed college, and another 42% of them have a degree beyond college. Almost half said their employer would allow them to stay. And a full 70% described their location as “rural” or “very rural.”*

The Aging Population

Table 1: Median Age in Addison Region	
Year	Median Age
2000	36.1
2010	40
2018	43.7

In 2000 about 25% of the population was school age, while about 11% was over 65. In 2010 the school age population dropped to 16.5% and over 65 rose to 13%. By 2018 the school age population was 13.3% and the over 65 population was 18.5%.¹⁸ The population of the Addison Region is aging as the median age continue to rise. The median is one measure of the statistical center of the data. In this case, we can say that half of the population is younger than the median age and half of the population is older. The population of working age Vermonters (25-

64) decreased by 5% between 2010 and 2018. That population is expected to decrease another 9% between 2018-2030. According to the 2020 Vermont Housing Needs Assessment, between 2020 and 2025, the median age of the head of an Addison County household will increase from 59 to 61 for owners and remain at 46 for renters. An estimated 36% of all householders in the county will be at least 65 years old and 4% will be at least 85 years old by 2025.

Housing

Housing is a key element of any sustainable community. The stock should be adequate to house those who live and work in the community and have the potential to expand at a rate that can accommodate future population increases and economic growth. In addition, housing should support the region’s growing elderly population, and attract new families with school age children. Available housing needs to be safe, energy efficient, and accessible for the community’s aging and vulnerable populations. Although the Region has experienced minimal population growth over the last decade, demand for housing has increased due to smaller households and an acute shortage of suitable housing. To fully understand this issue and succeed in providing sufficient housing for the population, communities must assess the current composition of households and the characteristics of the existing housing stock in the Addison Region.

Small Households

An increase in small households is seen in the Addison Region. Between 1970 and 2000, the average household size dropped from 3.4 to 2.56 persons. In 2000, just over one quarter of the region's households included a married couple with children. By 2018, the average household size fell to 2.31 persons. For individual municipalities the average household size ranged from 1.7 to 2.84 persons.

Current Housing Stock

The Addison County Region and Vermont has seen a steady decrease in residential construction in the past 40 years. Since 1980, the average annual growth rate of housing units has decreased by 1.38%, dropping to 0.78% during the 2000-2010 time period. Between 2010 and 2018 there has been a slight uptick in growth to 0.92%.

The rate of growth has varied widely amongst towns in the Region, however, with some municipalities seeing an increase in their housing stock. Bridport, Leicester, Orwell, Panton, Vergennes and Weybridge have returned to or slightly exceeded the rates of growth seen in the 1980s, whereas, Cornwall, Goshen, New Haven, Salisbury, Shoreham, Waltham and Whiting have experienced negative rates of growth and the loss of existing housing stock. A decline in home building ultimately reduces the availability of housing options for moderate and lower-income households by increasing the competition for the existing stock of affordable housing. New single-family home construction is often unaffordable for many households.

Housing Occupancy

Total housing occupancy is defined by the vacancy rate: the number of homes for rent or purchase compared to the total number of homes used or intended for renter or homeowner. Based on the U.S. Census Bureau, American Community Survey 5-year estimates, 2013-2017, the rental vacancy rate for the Addison Region was 3%. This rate is higher than the State as a whole but lower than what is considered healthy, 5%. In contrast, the vacancy rate of owned homes was 2.1%, which is considered healthy. These rates, however, have a considerable margin of error due to a small sample size and the potential inclusion of substandard housing units. Overall, residential vacancy rates have come down significantly in the past decade since the Great Recession. In 2010, Vermont had a 7% rental vacancy rate which dropped to 3.4% in 2018. Low rates make it difficult for renters and homeowners to find affordable housing and creates upward pressure on prices.

***Covid-19 Pandemic** Since the beginning of the pandemic, vacancy rates have continued to decrease and home prices have sharply risen, creating an increasingly tight housing market. According to the Federal Reserve Bank of St. Louis, the Vermont rental vacancy rate dropped from 4.4% in 2019 to 3.3% in 2020 and the ownership rate from 1.3% to 0.7%. respectively. Both of these rates are below what is considered healthy for the housing market; 5% for rentals and 1.3% for home ownership. Addison County's vacancy rates are typically slightly higher than the State numbers but have dropped significantly since March 2020.*

In 2018, single-family homes were still the most prevalent type of housing (74%) followed by small multifamily buildings of 2-9 units (12%) and mobile homes (8%)

Infill construction of small or multifamily homes in rural villages and towns is often deterred or prohibited by outdated zoning and infrastructure constraints such as water and wastewater.

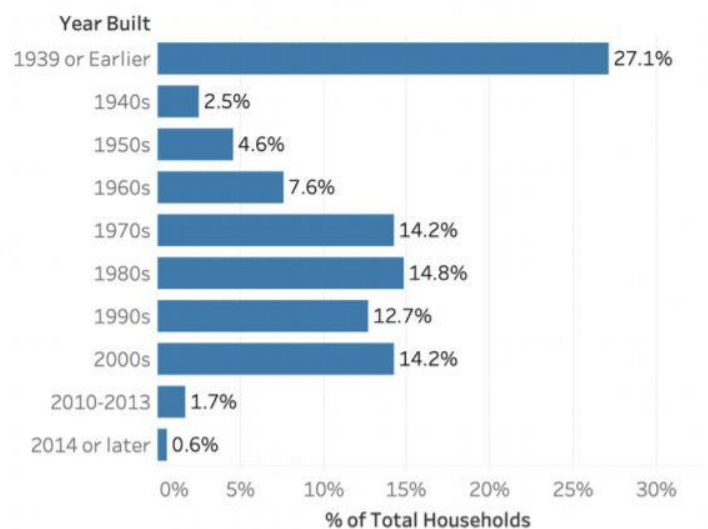
Housing Age and Size

Older homes are an important part of the character and historical record of the villages and towns in the Addison County region. Just over 27% of the current housing stock was built prior to 1939. After 1939, however, the region and state saw twenty years of slow growth, a 2-4 % rate of housing construction, until the building boom in the 1960s and 70s (Figure 18). It was during this time that many of the mobile home parks in the region were constructed.

The median age home in the Addison Region was built in 1976. In Bristol, 50% of the houses were built prior to 1939, while in Vergennes, 36.5% fall into that category. Despite their charm, older homes are not the best fit for many households today. High energy and property maintenance costs can be financially burdensome.

Older village homes can be large, constructed at a time when the average family size was much greater than it is today. Historic farmhouses were designed to house extended families and workers with numerous bedrooms and living areas. Similarly, single-family homes built for the 'nuclear family' (two parents and their children) do not match the needs of the growing number of smaller households. Counter intuitively, home size has increased 50% since the 1960s. In 2019, the majority of existing housing units in the Addison Region were single family, owner occupied, three-or-more-bedroom homes, often on large village or rural lots. In 2018, 30% of households were one-person, but only 11% of the housing stock was a studio or one-bedroom unit. During the same period, 32% of households were composed of three or more people, but 62% of the housing stock had three or more bedrooms. Our current housing stock does not match the current needs of the Region.

Figure 18: Estimated Age of Housing as Proportion of Total
Source: U.S. Census Bureau



Housing Affordability

Housing values have been rising steadily in Addison County over the past twenty years, mirroring the pattern of the State as a whole. This trend, combined with twenty years of low home construction rates (driven in part by high construction costs), an increase in total households and a reduction of household size has resulted in a critical shortage of adequate housing for a growing percentage of the Region's population. Adequate housing can be defined as:

- Homes that are affordable for community members.
- Homes for single person households and first-time homeowners.
- Homes desirable for new families to move to the area, enroll their children in our schools, and fill jobs that support our economy.

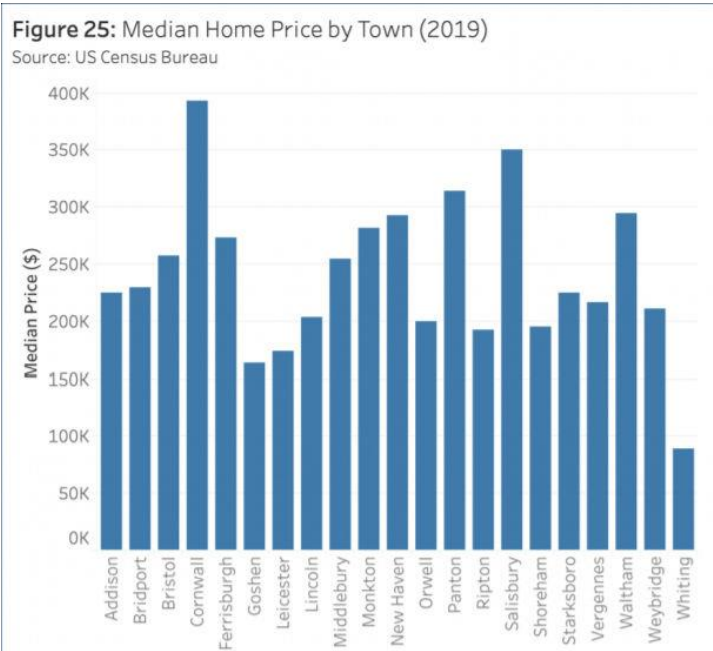
- Homes that are appropriate for our elderly population to age in place in their community with their families and friends.
- Homes that are close to employment centers and/or public transportation.
- Homes that are safe and energy efficient.
- Homes that are appropriate for vulnerable populations.

High demand for housing in Chittenden County creates pressure for nearby Franklin, Lamoille, Addison and Grand Isle counties. These counties have the highest median home sale prices and rents in the state, next to Chittenden County.

***Covid -19 Pandemic** Throughout Vermont, home prices rose sharply during the summer of 2020 as people migrated to the state due to the Covid-19 pandemic, exacerbating an already tight housing market. Heightened interest from out-of-state buyers, a low vacancy rate, and favorable interest rates have all contributed to increased housing prices. Most of the real estate transactions involved higher priced homes of \$500,000 and up. Even so, the increased demand for housing has impacted the market at all levels, further limiting affordable options for local and first-time buyers. According to the Northwest Vermont Real Estate Market Report, the median price of single-family homes in Addison County rose to \$275,000 during the 2nd quarter of 2020, April to June. A recent report states that there was an increase of more than 1,000 residential property sales to out-of-state buyers in 2020 compared to in 2019, an increase of 38%, and the amount of money those buyers spent was up by 79%.*

Housing Affordability Gap

Housing costs include, but are not limited to, rent, taxes, insurance, utility and heating costs. When households spend more than 30% of their income on housing it often becomes difficult to pay for basic living expenses, such as food, utilities, transportation, health care and childcare. According to U.S. Census Bureau 2018 estimates, more than one in three Vermont households pay an unsustainable percentage of their income towards housing costs. The gap between what a household can afford and the income necessary to purchase or rent a home continues to grow in the Addison County region. In 2020, it is difficult for households that make the area median income (AMI) to afford median priced housing. From 2010 to 2018 the median home price increased by 17% while the median household income rose by 11%. This affordability gap increases the potential for moderate and lower-income families to become burdened by housing costs.



Current and Future Housing Needs

The current housing crisis/shortage is a complex issue. The age and size of existing stock, the cost of construction, materials and land, a lack of infrastructure in rural villages, incompatible zoning regulations and expensive regulatory processes inhibit the ability to create needed housing. Modest starter homes are unaffordable for young families or seniors wanting to downsize and age in place. A lack of workforce housing, homes affordable for people in occupations essential to the local economy, force employees to travel long distances or relocate. Despite an active network of housing support organizations and funding opportunities, many households in the region still do not have access to the housing they need, in many cases because it doesn't exist. In turn, the lack of appropriate and affordable housing in the region affects the region's communities in the following ways:

- Contributes to population changes as families can't afford homes in the region,
- Impacts schools,
- Impacts the economy,
- Increases housing insecurity for vulnerable populations,
- Reduction of the workforce, hard to find employees,
- Difficult for seniors to age in their homes and communities.

The current housing crisis is regional, but the strategies and solutions used to address this crisis need to be specific to each community. There is no one size fits all solution. Challenges and opportunities faced in the City of Vergennes, for example, will differ from those faced in Shoreham. Equally important, the issues faced within a town's village center may be very different from those in its rural areas. Because the issues are distinct, the solutions will be as well.

NESDEC Facility Studies for MAUSD and ANESD

The following are excerpts from the New England School Development Council (NESDEC) reports prepared for the Mt Abraham Unified School District (MAUSD) and the Addison Northwest School District (ANWSD) projecting student enrolment in each district. The entire MAUSD report is here -

<https://drive.google.com/file/d/1gVajHH4mnFFA-OfIcbCWDTJ-3qJGoUr/view> and the entire ANWSD report here - https://drive.google.com/file/d/1ty-_FGn5eUll712KMV-sRNrkMqdbEEemJ/view .



From 2016 to 2028, the US Department of Education anticipates changes in PK-12 enrollment of +5.4% in the South; +2.1% in the West, -2.1% in the Midwest; and -3.7% in the Northeast.

State	Fall 2016 PK - 12	Fall 2028 Projected	PK-12 Decline	% Change, 2016-2028
CT	535,118	471,100	-64,018	-12.0%
ME	180,512	171,600	-8,912	-5.0%
MA	964,514	939,400	-25,114	-2.6%
NH	180,888	161,000	-19,888	-11.0%
RI	142,150	135,700	-6,450	-4.5%
VT	88,428	80,400	-8,028	-9.0%

Source: USDE, National Center for Education Statistics, *Projections of Education Statistics to 2028*, Table 3, Pages 35-36; Published May 28, 2020.

Although most New England Districts are seeing a decline in the number of births, NESDEC's experience indicates that the impact on enrollment varies from District to District. Almost half of New England Districts have been growing in PK-12 enrollment, and a similar number are declining (often in rural areas) with the other Districts remaining stable.

Mt. Abraham USD, VT Historical Enrollment

School District: Mt. Abraham USD, VT

10/15/2020

Historical Enrollment By Grade																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2005	140	2010-11	67	132	128	96	102	133	132	122	117	119	126	123	143	134	0	1607	1674
2006	121	2011-12	80	112	128	133	89	97	132	133	120	121	122	132	131	147	0	1597	1677
2007	116	2012-13	0	117	116	128	135	89	102	132	128	127	118	128	128	127	0	1575	1575
2008	128	2013-14	67	104	116	112	133	135	84	101	126	130	121	124	124	129	0	1539	1606
2009	107	2014-15	96	115	112	113	112	133	133	85	96	126	128	113	121	122	0	1509	1605
2010	111	2015-16	145	101	104	107	113	108	131	128	78	96	117	131	111	116	0	1441	1586
2011	113	2016-17	155	108	102	107	113	115	106	133	124	75	99	115	118	108	0	1423	1578
2012	96	2017-18	118	89	103	99	108	115	113	105	123	125	77	104	108	119	0	1388	1506
2013	117	2018-19	129	94	94	99	108	104	110	114	92	117	128	81	101	108	0	1350	1479
2014	102	2019-20	146	88	98	92	104	106	108	112	112	97	119	134	87	97	0	1354	1500
2015	83	2020-21	136	89	83	91	87	99	102	104	107	113	98	117	124	84	0	1298	1434

Historical Enrollment in Grade Combinations									
Year	K-4	PK-6	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2010-11	591	912	845	1081	490	358	236	762	526
2011-12	559	904	824	1065	506	374	241	773	532
2012-13	585	819	819	1074	489	387	255	756	501
2013-14	600	852	785	1041	441	357	256	754	498
2014-15	585	899	803	1025	440	307	222	706	484
2015-16	533	937	792	966	433	302	174	649	475
2016-17	545	939	784	983	438	332	199	639	440
2017-18	514	850	732	980	466	353	248	656	408
2018-19	499	852	723	932	433	323	209	627	418
2019-20	488	854	708	917	429	321	209	646	437
2020-21	449	791	655	875	426	324	220	643	423

Historical Percentage Changes			
Year	K-12	Diff.	%
2010-11	1607	0	0.0%
2011-12	1597	-10	-0.6%
2012-13	1575	-22	-1.4%
2013-14	1539	-36	-2.3%
2014-15	1509	-30	-1.9%
2015-16	1441	-68	-4.5%
2016-17	1423	-18	-1.2%
2017-18	1388	-35	-2.5%
2018-19	1350	-38	-2.7%
2019-20	1354	4	0.3%
2020-21	1298	-56	-4.1%
Change	-309		-19.2%

Addison Northwest School District, VT Historical Enrollment

School District: Addison Northwest Supervisory Union, VT

7/21/2020

Historical Enrollment By Grade																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2004	90	2009-10	65	74	86	76	90	66	84	87	81	95	101	110	94	113	0	1157	1222
2005	90	2010-11	72	75	84	72	86	73	95	76	85	88	85	92	109	111	0	1131	1203
2006	90	2011-12	72	75	84	72	86	73	95	76	85	88	85	92	109	111	0	1131	1203
2007	94	2012-13	0	34	80	86	70	85	72	94	77	89	88	83	92	119	0	1069	1069
2008	69	2013-14	68	66	70	73	83	69	82	73	91	72	88	81	86	93	0	1027	1095
2009	70	2014-15	68	61	77	73	75	85	68	83	67	84	75	87	82	89	0	1006	1074
2010	81	2015-16	66	64	56	79	70	77	84	67	90	64	78	68	85	80	0	962	1028
2011	47	2016-17	79	56	61	79	66	67	68	79	67	88	66	82	67	87	0	933	1012
2012	70	2017-18	76	64	56	63	54	66	68	67	82	66	92	65	81	64	0	888	964
2013	58	2018-19	21	58	59	56	62	50	64	68	70	85	67	95	72	86	2	894	915
2014	73	2019-20	26	52	57	62	58	65	50	62	71	67	87	66	99	73	0	869	895
2019-20 Mid-year			25	54	54	60	55	62	50	62	70	67	86	65	98	74	0	857	882

Historical Enrollment in Grade Combinations									
Year	PK-6	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2009-10	628	476	563	739	347	263	176	594	418
2010-11	633	485	561	734	344	249	173	570	397
2011-12	633	485	561	734	344	249	173	570	397
2012-13	521	427	521	687	332	260	166	548	382
2013-14	584	443	516	679	318	236	163	511	348
2014-15	590	439	522	673	302	234	151	484	333
2015-16	563	430	497	651	305	221	154	465	311
2016-17	555	397	476	631	302	234	155	457	302
2017-18	514	371	438	586	283	215	148	450	302
2018-19	438	349	417	572	287	223	155	475	320
2019-20	432	344	406	544	250	200	138	463	325

Historical Percentage Changes			
Year	K-12	Diff.	%
2009-10	1157	0	0.0%
2010-11	1131	-26	-2.2%
2011-12	1131	0	0.0%
2012-13	1069	-62	-5.5%
2013-14	1027	-42	-3.9%
2014-15	1006	-21	-2.0%
2015-16	962	-44	-4.4%
2016-17	933	-29	-3.0%
2017-18	888	-45	-4.8%
2018-19	894	6	0.7%
2019-20	869	-25	-2.8%
Change	-288		-24.9%

Mt. Abraham USD, VT Projected Enrollment

School District: **Mt. Abraham USD, VT** 10/15/2020

Enrollment Projections By Grade*																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2015	83	2020-21	136	89	83	91	87	99	102	104	107	113	98	117	124	84	0	1298	1434
2016	94	2021-22	137	86	90	79	94	84	98	102	98	108	115	101	115	121	0	1291	1428
2017	103	2022-23	138	94	87	86	81	91	83	98	96	98	110	118	99	112	0	1253	1391
2018	110	(prov.) 2023-24	139	100	95	83	88	78	90	83	92	96	100	113	116	97	0	1231	1370
2019	98	(est.) 2024-25	140	90	101	91	85	85	77	90	78	92	98	103	111	113	0	1214	1354
2020	98	(est.) 2025-26	141	89	91	97	94	82	84	77	84	78	94	101	101	108	0	1180	1321
2021	101	(est.) 2026-27	142	92	90	87	100	91	81	84	72	84	79	97	99	99	0	1155	1297
2022	102	(est.) 2027-28	143	93	93	86	90	97	90	81	79	72	85	81	96	97	0	1140	1283
2023	102	(est.) 2028-29	144	93	94	89	88	87	96	90	76	79	73	87	80	94	0	1126	1270
2024	100	(est.) 2029-30	145	91	94	90	92	85	86	96	84	76	80	75	86	78	0	1113	1258
2025	100	(est.) 2030-31	146	92	92	90	93	89	84	86	90	84	77	82	74	84	0	1117	1263

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.
■ Based on an estimate of births ■ Based on children already born ■ Based on students already enrolled

Projected Enrollment in Grade Combinations*									
Year	K-4	PK-6	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2020-21	449	791	655	875	426	324	220	643	423
2021-22	433	770	633	839	406	308	206	658	452
2022-23	439	758	620	814	375	292	194	633	439
2023-24	444	756	617	805	361	271	188	614	426
2024-25	452	759	619	789	337	260	170	595	425
2025-26	453	755	614	776	323	239	162	566	404
2026-27	460	767	625	781	321	240	156	530	374
2027-28	459	773	630	781	322	232	151	510	359
2028-29	451	781	637	792	341	245	155	489	334
2029-30	452	779	634	794	342	256	160	479	319
2030-31	456	772	626	800	344	260	174	491	317

Projected Percentage Changes			
Year	K-12	Diff.	%
2020-21	1298	0	0.0%
2021-22	1291	-7	-0.5%
2022-23	1253	-38	-2.9%
2023-24	1231	-22	-1.8%
2024-25	1214	-17	-1.4%
2025-26	1180	-34	-2.8%
2026-27	1155	-25	-2.1%
2027-28	1140	-15	-1.3%
2028-29	1126	-14	-1.2%
2029-30	1113	-13	-1.2%
2030-31	1117	4	0.4%
Change	-181	-13.9%	

*Projections should be updated annually to reflect changes in in/out-migration of families, real estate sales, residential construction, births, and similar factors.

Addison Northwest School District, VT Projected Enrollment

School District: **Addison Northwest Supervisory Union, VT** 7/21/2020

Enrollment Projections By Grade*																			
Birth Year	Births	School Year	PK	K	1	2	3	4	5	6	7	8	9	10	11	12	UNGR	K-12	PK-12
2014	73	2019-20	26	52	57	62	58	65	50	62	71	67	87	66	99	73	0	869	895
2015	72	2020-21	27	62	50	59	55	58	65	49	65	70	69	87	69	100	0	858	885
2016	88	2021-22	28	76	60	51	53	55	58	64	51	65	72	69	90	70	0	834	862
2017	65	2022-23	29	56	74	62	46	53	55	57	67	51	67	72	72	91	0	823	852
2018	61	(prov.) 2023-24	30	52	54	76	55	46	53	54	59	67	52	67	75	73	0	783	813
2019	72	(est.) 2024-25	31	62	50	56	68	55	46	52	56	59	69	52	70	76	0	771	802
2020	72	(est.) 2025-26	32	62	60	51	50	67	55	45	54	56	61	69	54	71	0	755	787
2021	71	(est.) 2026-27	33	61	60	62	46	50	67	54	47	54	58	61	72	55	0	747	780
2022	68	(est.) 2027-28	34	59	59	62	55	46	50	66	56	47	56	58	63	73	0	750	784
2023	69	(est.) 2028-29	35	59	57	61	55	55	46	49	69	56	48	56	60	64	0	735	770
2024	70	(est.) 2029-30	36	61	57	59	55	55	45	51	69	58	48	58	61	61	0	732	768

Note: Ungraded students (UNGR) often are high school students whose anticipated years of graduation are unknown, or students with special needs - UNGR not included in Grade Combinations for 7-12, 9-12, etc.
■ Based on an estimate of births ■ Based on children already born ■ Based on students already enrolled

Projected Enrollment in Grade Combinations*									
Year	PK-6	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2019-20	432	344	406	544	250	200	138	463	325
2020-21	425	349	398	533	249	184	135	460	325
2021-22	445	353	417	533	238	180	116	417	301
2022-23	432	346	403	521	230	175	118	420	302
2023-24	420	336	390	516	233	180	126	393	267
2024-25	420	337	389	504	213	167	115	382	267
2025-26	422	345	390	500	210	155	110	365	255
2026-27	433	346	400	501	222	155	101	347	246
2027-28	431	331	397	500	219	169	103	353	250
2028-29	417	333	382	507	220	174	125	353	228
2029-30	423	342	387	507	220	165	120	345	225

Projected Percentage Changes			
Year	K-12	Diff.	%
2019-20	869	0	0.0%
2020-21	858	-11	-1.3%
2021-22	834	-24	-2.8%
2022-23	823	-11	-1.3%
2023-24	783	-40	-4.9%
2024-25	771	-12	-1.5%
2025-26	755	-16	-2.1%
2026-27	747	-8	-1.1%
2027-28	750	3	0.4%
2028-29	735	-15	-2.0%
2029-30	732	-3	-0.4%
Change	-137	-15.8%	

*Projections should be updated annually to reflect changes in in/out-migration of families, real estate sales, residential construction, births, and similar factors.

Regional transportation services analysis

Submitted to: Addison Northwest School District & Mount Abraham Unified School District Merger Study Committee

November 1, 2021



DECISION SUPPORT GROUP
BETTER DECISIONS FOR A COMPLEX WORLD

Problem Statement and Methodology

- Critical question was how to design a regionalized transportation system to support minimized ride times, minimized costs and operational efficiency
- Two key options:
 - Create a dedicated system of services for middle and high school students while refining and revising the in-district system for elementary students
 - Establish an integrated shuttle system that connects the two existing districts, but limits disruption to the current transportation system
- Key decision factors used by DSG to assess the viability of the models:
 - School time requirements
 - Impact on student travel time
 - Cost
 - Availability of resources (buses, personnel)

Baseline

- 504 total MS students
- 728 total HS students
- 435 established bus stops
- 29 buses serving both schools
 - 19 (MAUSD)
 - 10 (ANWSD)
- Furthest student – MS – 20 miles
- Furthest student – HS – 22 miles



3

Initial Planning Parameters

- Develop a regionalized transportation system assuming:
 - All students eligible
 - Baseline walk distance of 3,500 ft to a stop
 - Grades 6-8 in Vergennes High School
 - Grades 9-12 in Mount Abraham Middle/High School
- Used existing 8:00/3:00 Elementary school time and 8:20/3:30 High School/Middle School bell times
 - Offsetting times are only relevant in the transfer scenario
- Assumed a 10-minute arrival and departure window in the morning and afternoon, respectively
- Target maximum of 60 students per bus
 - Some routes more based on density/dispersion
 - Assumes all students are eligible and will ride
- Target maximum of 60 minutes for maximum ride time (is impractical for notable portions of the system)
- Remote students not included in the routing scenario



98

Route Modeling Summary

- 39 total buses required in the model
 - 22 HS buses – average of 33 riders, 53 minutes, and 21 miles
 - 18 MS buses - average of 29 riders, 68 minutes, and 29 miles
- 15 routes with greater than 60-minute route times



5

Assessment of Results

- Practically the need would likely be 43 to 45 buses
 - Address long ride times (4 routes approaching 90 minutes)
 - Key issue is the tail from last stop to school
- School times can remain relatively consistent but would require several early, and likely unacceptable, pickups/drop-offs
- A limited population of students would have long ride times of at least 60 minutes morning and afternoon
- Net cost impact likely to be \$770,000 to \$880,000
 - Assumed \$55,000 per bus per year
 - Assumed baseline of 29 buses
- Logistical challenge likely to not be buses but personnel
 - Options include:
 - Create district run portion of system
 - Recruit additional vendors likely at higher-than-assumed cost
 - Reduce eligibility for services



Shuttling option

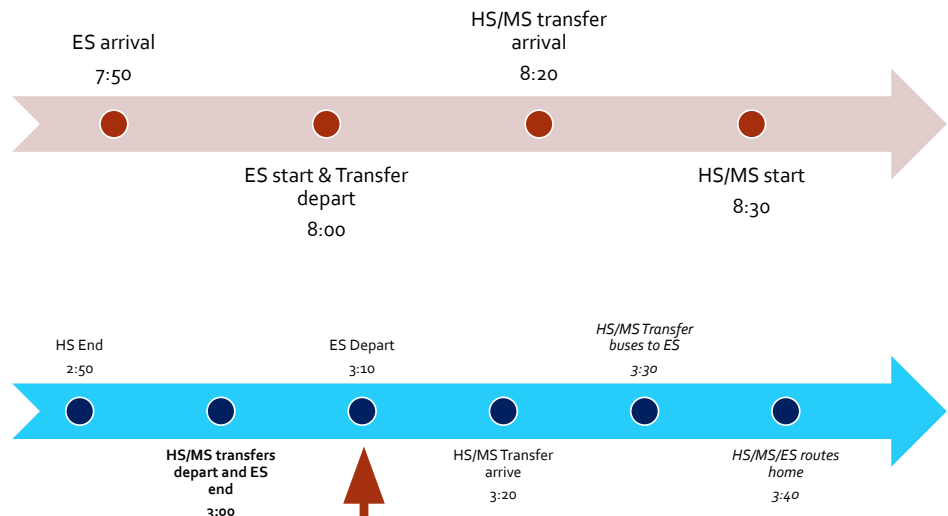
- Maintain in-district routing structure and use shuttles to move students to and from destination schools
 - 318 students from ANWSD to MAUSD
 - 320 students from MAUSD to ANWSD
- Approximately 20-minute ride time between VUHS & MAUHS
- Require 7 to 10 buses for shuttles
 - May require 2 to 3 additional assets above baseline of 29 absent further consideration of school times
 - \$385,000 to \$550,000 cost impact without bell time changes
 - \$110,000 to \$165,000 cost impact with time changes
- With nested length of day, afternoon routes will be challenged



Shuttling summary – Simple in the morning; harder in the afternoon

Assume a:

- Day structure similar to the current
- 20-minute travel between VUHS and MAUHS



7 to 10 transfer routes must be completed and back to the ESs by this point to not add buses



Considerations for shuttle use

- Determine whether shuttle staging is viable at each location
- Establish school start times that allow for 20 minutes of shuttle time
 - Consideration of HS/MS times would be required to minimize any additional bus requirement
 - May require a 10 to 15 minute earlier start
- Assess elementary impacts to support afternoon shuttle availability
- Develop two sets of take-home routes
 - Elementary take homes with full route complement of buses to shorten route times (slightly)
 - HS/MS take home likely to be lightly loaded
- Consideration of athletic and after school services
 - Would likely need additional buses to support this
 - Quantity would be seasonal and determined by scheduling, pairing, and driver availability



9

Most Viable Option

- Establishing a merged district would not be limited by transportation demands
 - Continued assessment of longer ride times and bell times would be required
 - Innovation in both service offerings and routing strategy will be required
 - Continued assessment of baseline assumptions and opportunities in the broader network, including elementary services, would be beneficial
- DSG suggests that development of a shuttle network between the districts is the most viable option
 - Shuttling is similarly challenging logistically but likely substantially less costly
 - Recent events have demonstrated that driver availability is the most significant obstacle. Addressing this is likely to result in notable to significant cost increases
 - Management of shuttle sites will require notable efforts on the part of both districts
- Communication strategies would be required to address what are likely to be perceived longer rides for shuttle students



101

Contact Information

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Addison Northwest

A unified district that provides an excellent education to all students and assures equity regardless of the town of residence	Yes/No/Partially	Evidence/Examples
Increased coordination of mission, vision, and strategic plan	Yes	Annual development of the district continual improvement plan (new when Superintendent Soule started). Process for review of the vision (via the Board & the Community Engagement Committee), development of the district vision and mission statement (worked with consultant)—2017-18.
Possible - Improve middle school experience for all students across the district	Partially	Better alignment of grade six across the two schools. 7-8 is the same as it has been. Discussions continue around continued development of the middle school model.
Possible - Foreign language for all students in elementary school	No	Has not been expressed as a priority since Act 46 merger report and articles of unification were ratified.
Possible - study of expanded student/family school choice within the district	Yes	Policy allows for choice at the elementary level.
Equitable class sizes (10/class v. 22/class)	Yes	Class sizes have come into alignment within policy between VUES and FCS since ACS repurposing.
Equitable staffing, reallocation from place of hire	Partially	Already had equitable staffing. Equity across the two elementary schools: Relocating people rather than rifting them. (e.g., FCS to VUES)
Cross school custodial/maintenance team	Yes	Overall management is centralized.
Equitable access to technology	Yes	Centralized tech services. One-to-one tech in all buildings.

Equitable staff support for technology	Yes	
Increased administrative focus on education quality over management	Partially	In progress, but managing a crisis with COVID has demanded a temporary shift in focus. Still, overall cohesive and collectively focused on education quality and improvement thereof.
Students arrive at middle school with similar levels of preparation	Unclear	As evidenced by what and by what standards—academic, social? Other than anecdotally, this data has not been collected. Free and reduced lunch has correlation to readiness, but that is more circumstantial than location-based.
Effective and efficient use of taxpayer resources		
Increased flexibility in board deployment of resources	Unclear	Which resources? All schools are funded similarly within the district.
Modest administrative savings (\$40-70k) in year 1	Yes	In the first year of consolidation \$129,679 savings.
Sustained programs when cutting budgets	Until now, yes	Further budget cuts will likely result in programming loss.
Single budget	Yes	
Slow the growth in homestead tax rates - incentives	Yes	Slowed as a result of merger. See District budget information (including annual report).
Slow the growth of homestead taxes - local fiscal decisions, shared pupil counts		
Value to the broader community, each community		
Citizens have the info they need in an understandable format		Which info? If a reference to the annual report, then yes, because the ANWSD is consistently passing its budgets. That being said, the Board has acknowledge there is room for

		improvement in the format of the annual report.
Central office budget and services directly accountable to citizens and elected board	Yes	In the past, when the district was an SU, the central office costs were allocated out to the schools. Nobody had a say in whether the district was to, say, hire a director of student services. That is no longer the case. An additional level of scrutiny now applies with unified board.
Clear expectations for the superintendent	Yes.	The job description prior to Superintendent Soule was well thought out and in strong alignment with the leadership standards for superintendents. Much effort has been put into assessment of and communication of feedback to superintendent (annual goals, feedback, etc.).
Single, integrated budget	Yes	
One audit	Yes	
Value/care/welcome for each community	Yes/Perhaps	Addition of Addison to VUES. Covid hampered efforts for intended community events.
Respect for the history and culture of each community	Partially?	Depends who is asked. Some people felt and still feel that respect wasn't there during restructuring.

Review of ANESU Act 46 Report

29 September 2021

From: Ed McGuire

To: M. DeGraaf and M. Kelley, Co-Chairs, ANWSD/MAUSD Merger Study Committee

The ANESU Act 46 Final Report and Articles of Agreement were completed on 1 September 2016. The unification of ANESU into the Mt. Abraham Unified School District became effective on 1 July 2018. MAUSD is now in its 4th year of operation.

This paper reviews progress to date of the vision and articles contained in the Final Report. Input was obtained from the Superintendent and his staff whose overall view of the effect of Act 46 is that MAUSD is now..... “one school with many campuses.”

<p>Excellent education for all students that assure equity, regardless of town of residence</p>	
<p>Eliminate inequities across elementary schools</p>	<p>Since becoming a unified district many changes have been made to address inequities across our schools while recognizing the importance of each school maintaining its own unique qualities and characteristics. Some of the equities we have been able to achieve across schools include: equitable access to academic intervention; common EST process; all schools have access to high quality professional development both embedded and as part of our in-service time; common length of instructional blocks for literacy, math, art, music, PE; all schools have the same safety and security features in place (door locks, cameras, intercom system); all schools use the same emergency response practices and commands</p>
<p>Allocate personnel across schools as needed</p>	<p>As a unified district we have been able to reassign staff across schools in a flexible manner which has enabled us to maximize the resources we have to ensure student needs are being met. This flexibility has also enabled us to keep employees fully employed as student needs ebb and flow. Specifically</p>

	<p>this has led to Sister schools (Lincoln and Robinson,, Beeman and Monkton) who share staff in art, music, PE, special ed, instructional coaches, and interventionists.</p>
<p>Improve equity of access to expanded learning programs (after-school and summer)</p>	<p>All MAUSD schools now participate in the Expanded Learning Program (ELP)after school and summer. Bristol and Robinson qualified because of numbers of free and reduced lunch students. Now all ES as well as the MS and HS participate. Total of summer and after school is over 200 making ELP the 3rd largest school in MAUSD.</p>
<p>Retain valued employees through reassignment</p>	<p>Multiple employees, both licensed staff and unlicensed staff, have been retained through reassignment when they otherwise likely would have lost their jobs. Obtain a reduction in staff by not filling a vacancy rather than RIF.</p>
<p>Increase admin time toward education quality v. management (from 85% supt time on board/management)</p>	<p>One board with one budget has significantly reduced the amount of time administrators are spending managing board work. Dealing with COVID-19 and declining enrollment as a Supervisory Union would have been unthinkable. Having one board means one message to all concerned.</p>
<p>Balance program offerings at elementary schools</p>	<p>All MAUSD schools now have common mentoring programs, access to professional interventionists, after school programs, common intervention programs, and common instructional blocks.</p>
<p>District-wide professional development</p>	<p>MAUSD now has a district-wide professional development plan which we are able to support through pooled professional development funds focused around our district strategic plan. The majority of inservice days as well as early release days are used for focused professional development, often bringing teachers and support staff from across schools together to learn with and from one another. Leaps and bounds improved. Centralized programs for all .</p>

Align curriculum/programs across schools	Since merging all MAUSD schools are now PBIS schools. This is a national behavior system which focuses on positive things kids do. MAUSD is considered a model in the state. Bridges math program is used in all elementary schools.
All students arrive at the middle level with similar academic knowledge	Since merging MAUSD has developed a common curriculum across elementary schools in most academic and social/emotional areas. Students have equal access to core instructional time in literacy and math and across all the related arts, we have allocated staffing equitably to provide support for students in need of additional support. All elementary schools have time built into their day for intervention that does not remove students from core instruction. This time is called "WIN Blocks, What I need?" MS and HS have similar "Learning Commons."
Increased review of school accountability for academic outcomes	MAUSD's decision-making continues to be refined based on data. Assessment plan has improved significantly. Staff are now engaging in professional learning communities where they will look at student work and student outcomes. A data manager is now available to help access student data more readily.
Equitable class sizes	Since becoming MAUSD, efforts continue to address the variability of class sizes across our schools. By the 2022-2023 school year it is anticipated that class sizes in our schools will be equitable. 20 ideal. 23 or 24 high but necessary if limited by staffing.
Equitable staffing	Staffing decisions are made at the district level with input from building leadership, informed by their direct work with their staff. As a result, the admin team has met staffing needs of our schools.
Equitable access to technology	Every student in MAUSD, from grades K-12 has access to a chromebook. Fiber optic service is available to all schools.
Equitable access to tech staffing/professional resources for technology	Tech support staff are responsive across the district to help ensure equipment is running properly. Students and staff have

	dramatically increased their knowledge base and ability to access a variety of software throughout the pandemic. This is largely due to the supports provided by the curriculum coordinators and instructional coaches.
Increased teacher collaboration across schools	Opportunities for teacher collaboration across schools have increased since merging under Act 46. We often use early release days to bring teachers from different schools together. In addition job-alike teachers (special education, art, music, PE, guidance, etc.) meet regularly.
Improved supervision and evaluation	Work in progress.
Maximize financial benefits	
Eliminate duplication of duties in managerial and administrative staff.	One budget, one board, one contract, improved flexibility in how we use resources across schools.
Single budget.	Much more streamlined. To the point that we reduced 1.0 accountant positions since merging under Act 46.
Increased accountability for superintendent	One board with a clear governance process driven by achievement of the ends. One board giving direction to the superintendent provides great clarity whereas multiple boards giving direction to the superintendent had potential for conflicting directives.
Increased flexible deployment of financial resources (to mitigate declining grant revenue)	This is evidenced by the examples given about the equitable deployment of personnel resources. In addition, as a district the money added to the Mt. Abe budget years ago to improve the facility has provided opportunities to improve other facilities. Likewise, fund balances created by not filling positions have created opportunities across schools.
Increased efficiency of business operations	Evidenced by reducing finance team staff by 1.0
Slow the growth in homestead tax rates - incentives	MAUSD did benefit from tax break incentives of 8, 6, 4 and 2 cents in the first four years of operation.
Slow the growth of homestead taxes - local	There are many additional factors that drive

fiscal decisions, shared pupil counts	tax rates outside of the benefit of Act 46 consolidation. Probably a better comparison is total District wide expenditures, and this has resulted in a 5.53% increase in total General Education spending from FY18 through the FY22 budget. This is in a time of decreasing pupils and reflects an average increase of 1.38% per year.
Admin savings (about \$140k) in year 1	Moving from several audits to one audit saved several thousand dollars. Additionally, we are saving approximately \$65K with the reduction of 1.0 accounting assistant. Yes in the ballpark.
Respect for the values of each community	
Community vote on entire budget including central office services	Yes
Increased opportunity to vote through Australian ballot in all communities	Yes
School-based advisory councils	This has not been determined by the board to date.
Streamlined communication	Yes. One board communicating out to the 5 town community vs a town hearing from local school board, Mt. Abe Board, SU Board.
First year operations?	Hired legal counsel to handle the special funds, debt transfer, real estate and property transfer. Paid for legal services using the \$100k grant that came with Act 46.



ANWSD / MAUSD Merger Study Committee

We are most proud of...

Learning - A Commitment to Innovation and best practice

- Wayfinders
- Walden
- Middle level, [historical commitment to middle level best practice](#)
- Project-based learning
- block schedules
- Proficiency-Based Learning
- Collaboration to provide opportunities across schools
- Support for continuous learning for educators
- Teachers! Caring staff
- Student-teacher relationships
- Social-Emotional Learning
- Do a lot for students with fewer resources than others may have
- Students successfully go to colleges
- [Morning meetings](#)
- [High school built around research based best practices \(12 principles\)](#)

Culture - Collaboration, relationships, commitment, value uniqueness and inclusion

- Freedom with limits/parameters, flexibility to make decisions
- Collaboration to provide opportunities across schools
- Support for continuous learning for educators
- Teachers! Caring staff
- Student-teacher relationships
- The success of the first unifications showed how willing the board and administration was to build community and extend bridges of welcome
- Legacy of a school and its impact on the community
- School-community connections and interactions
- Ability to pivot (such as during COVID lockdown)
- Commitment to students
- [We all share the same values and together create a stone foundation for more opportunities, preventing the closing of doors that is happening more and more now](#)

We could improve...

Learning/Student Outcomes:

- Disparities in student outcomes
- Cost per student varies by school and does not correlate to differences in student outcomes
- All students should have a graduation plan before high school
- Technology support is highly variable
- lack of PK providers/options
- Resume orientation for students (HS)
- Variability on after school programming and competition with/lack of alignment with community-based options, ensure aligned system
- Improve equity--identify and target students for intervention
- Ensure students connect outside the community--see the bigger world (too VT/local-centric)
- Need to improve student voice/governance
- Programmatic cuts, limited exploration and options; lacking student opportunities
- Lack of competition (class ranking) and meeting in the middle (promoting average)
- Continued collaboration - stop being rivals
- Assimilate while enjoying the richness of different community cultures
- Ensure teacher continuity/reduce teacher turnover
- Ensure access to learning opportunities is balanced k-12\
- Attract employees and avoid having unfilled positions
- Ensure continued work for an aligned curriculum
- Ensure all students are appropriately challenged and the curriculum and learning opportunities K-12 are aligned
- Ensure our schools are the ones people would choose
- Continue to build flexible pathways

Cost:

- Cost per student varies by school and does not correlate to differences in student outcomes
- Variability on after school programming and competition with/lack of alignment with community-based options, ensure aligned system
- Budget process is too limiting and constrains admin and board
- Class sizes (small)

- Programmatic cuts, limited exploration and options; lacking student opportunities
- When reductions are needed, ensure the impact is not heavier in one grade/age level over another

School-Community Partnerships:

- Misinformation in the community needs to be addressed
- Variability on after school programming and competition with/lack of alignment with community-based options, ensure aligned system
- Ensure students connect outside the community--see the bigger world (too VT/local-centric)
- Need to make the community a true partner and connect to the larger school system
- Ensure community feels a sense of control
- Need to improve student voice/governance
- Continued collaboration - stop being rivals
- Assimilate while enjoying the richness of different community cultures
- Access to PreK providers

In terms of education costs, we think taxpayers value...

- Different things when they are different stakeholders and depending on the ways they interact with the education system
- The price tag
- Expenditures that are made efficiently
- Expenses that yield outcomes
- The impact of property taxes on those with fixed incomes, people new to the community
- How the building looks vs. education inside the building
- Understanding the costs that are out of the control of the district
- The rate at which taxes are rising and opportunities for students are declining
- Opportunities to impact tax increases with community/student involvement
- Sense of control over local issues, including education spending
- What they get for the costs
- Understanding the tax rate impact on me
- Transparent evidence of education quality
- Small increases only
- Lower taxes and good schools

- Control over cost
- Success and pride in their schools, often most evident in sports and the arts
- A system that is transparent and well-governed is essential to ensure taxpayer value

What makes a local school and why are local schools important?

- Community
- Families feel safe sending their kids to school
- Local is relative; it's where you feel attachment and ownership
- Local could be a subset of a town or a region; it is community
- Some current views of local schools may drive a narrow scope
- Addison county towns have a lot in common and local, to some, is the county, not the town
- Local is a culture, including values and beliefs, that is defined together.
- Local does not need to be constrained to town boundaries
- Local is a reasonable bus ride to school, not an hour and a half.
- Local is about parents and non-parents involvement in schools.
- Local can be defined however we want it to be
- Local schools are more important in smaller towns
- Schools do create communities
- A place where you see your neighbors, feel comfortable, and belong
- Within 30 minutes of where you live... it's getting bigger

Evidence that a system is transparent and well-governed includes...

- Clear, consistent communication, including complexities
- Happiness of staff
- Positive community conversations
- A balance of longevity and turnover on the governing board
- A clear mission statement and opportunities to understand processes and the why
- A sense of community across the region
- Civic engagement that brings people together
- People feel informed and can see the big picture
- Focused on the ends (outcomes)

- Opportunities for citizens to engage and find information
- Recognition that a well-governed system relies on others to help create their own transparency, engage in community conversations, and know each other and ideas even when we don't agree
- Voice for all stakeholders
- Opportunities for different levels of engagement from a little to a lot
- Responsiveness to high levels of public scrutiny, accountability

8/31/21

9/21/21

10/4/21



Exchange Summary

June 5, 2022

What important perspectives would you like the Merger Study committee to consider about the proposed articles of agreement (while finalizing)?



PARTICIPATION
Breakdown of Participation



358
Participants



322
Thoughts



11,930
Ratings




PARTICIPATION

Breakdown of Participation



What role(s) best describe you?

 **341**
Responses

%		Answer <i>(Multi-select)</i>
38%	(130)	Community Member
30%	(104)	Faculty/ Staff
13%	(46)	Student
32%	(112)	Parent
2%	(9)	Board Member
9%	(31)	Other




PARTICIPATION

Breakdown of Participation



What is your town of residence?

%		Answer
6%	(19)	Addison
12%	(41)	Bristol
18%	(60)	Ferrisburgh
7%	(23)	Lincoln
6%	(22)	Monkton
4%	(13)	New Haven
1%	(3)	Panton
11%	(36)	Starksboro
4%	(15)	Waltham
17%	(58)	Vergennes



THOUGHTS

Key Thoughts

It would be useful to provide a side-by-side comparison of a merged v non-merged scenario showing tax bills, building use, class sizes, and staffing. These would seem important factors for voters when making decisions.

4.4 ★★★★★ (54)
 Ranked #1 of 322

I see nothing in the articles about what happens to the 2 superintendents nor District offices. 1 superintendent 1 office at public owned building This is for cost saving measures. Let's cut costs at the top.

4.4 ★★★★★ (53)
 Ranked #2 of 322

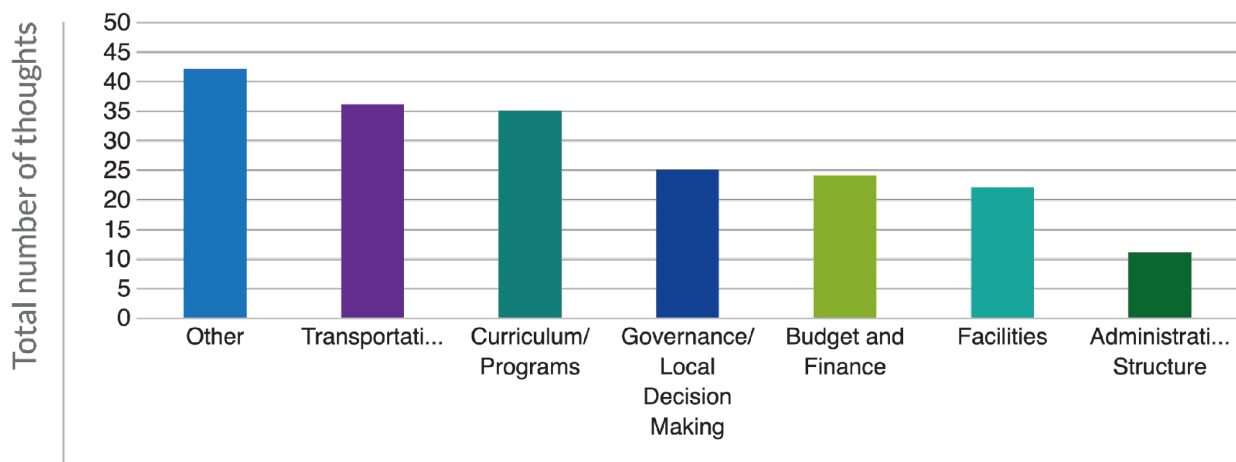
Until I see administrative cost saving and increased academics for students, this is a nay. Drastic cut in administration. 1 superintendent, 2 assist super, drastic cuts in redundant district staff. More AP classes, 2nd languages, arts. Cut admin, increase student education

4.4 ★★★★★ (53)
 Ranked #3 of 322



EXCHANGE THEME SET #1

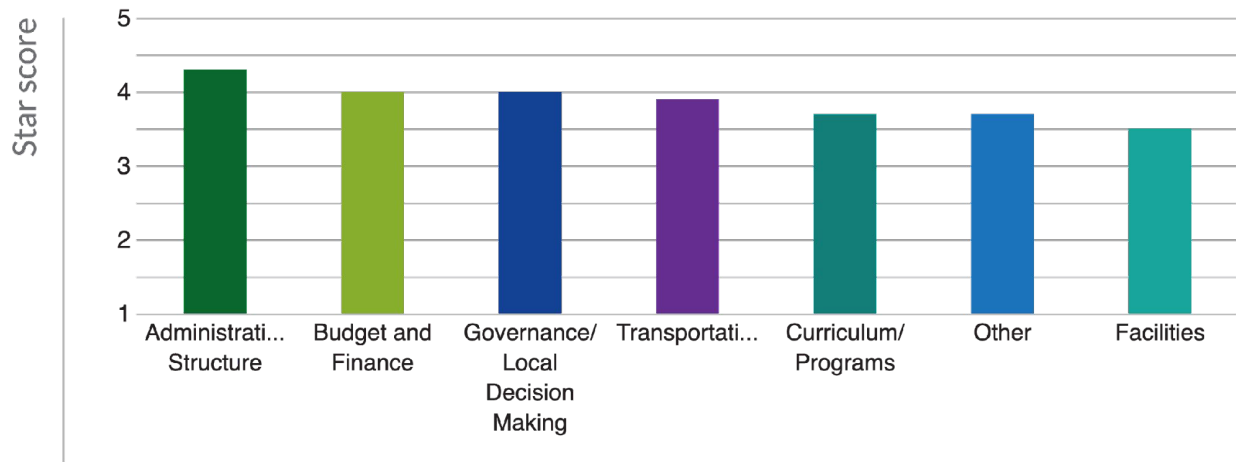
Top Themes by total thoughts





EXCHANGE THEME SET #1

Top Themes by star score



THOUGHTS

Administrative Structure

I see nothing in the articles about what happens to the 2 superintendents nor District offices. 1 superintendent 1 office at public owned building This is for cost saving measures. Let's cut costs at the top.

4.4 ★★★★★ (53)

Until I see administrative cost saving and increased academics for students, this is a nay. Drastic cut in administration. 1 superintendent, 2 assist super, drastic cuts in redundant district staff. More AP classes, 2nd languages, arts. Cut admin, increase student education

4.4 ★★★★★ (53)

Articles do not state how district offices, employees and superintendent will be merged for cost saving measures. Add how these will be merged. The point of merging a district should be cost savings including eliminating redundancies like 2 superintendents to 1, office staff and buildings.

4.3 ★★★★★ (55)





THOUGHTS

Budget and Finance



It would be useful to provide a side-by-side comparison of a merged v non-merged scenario showing tax bills, building use, class sizes, and staffing. These would seem important factors for voters when making decisions.

4.4 (54)

The merger conversation has already driven two towns out of our district. We need to re-evaluate our finances/spending and continue as MAUSD. The board seems to be in the dark about our actual financial situation. We are not in crisis, yet we are being told that we are, \$3Mil Lobby project??

4.2 (53)

A merger will just cost more, continue to be divisive, and yield VERY uncertain benefits. The Levenson report provides alternate ways to save money. Why merge if there's no benefit? This all must be the idea of school administrators, not folks who actually pay for schools.

4.1 (53)



THOUGHTS

Governance/ Local Decision Making



Closing town schools should not be okay unless the town has had a vote. We live in a democratic society. Small towns with small schools are more attractive to home owners/buyers.

4.3 (53)

The plan consolidates power in the hands of administration rather than in the hands of principals, teachers, and parents. The administration is distanced from and ill informed about the needs of our local communities and individual children. It sees only financial concern

4.2 (46)

As written, each town will have less local control and voice. Less people governing more- some towns have one rep on the 'new board'- it's a no for me

4.1 (54)

The articles of agreement outline a governance structure without conveying what benefits a merger would provide. Why would the districts merge if there is no benefit? The merger study committee work is conclusory and not supportable.

4.1 (51)



THOUGHTS Transportation



Students should have the right to access their public education without leaving their immediate community to do so. Long daily transportation times are not healthy for kids and cause inequities for kids who can't get rides to extracurricular activities.

4.1 (54 people)

Travel distance for students Our school districts are already very rural. Doubling travel time for some families is not an option.?

4.1 (54 people)

Travel time Difficult for kids

4.1 (54 people)

I challenge all board members to go to the furthest point where a student might get bussed from, then we use the school bus to school. Both Schools Homework will be impacted, sleep, general quality of life. Then factor rotten weather in. My goodness

4.1 (53 people)



THOUGHTS Curriculum/ Programs



Lots of vague governance language but how will combining improve what our students get? I want to see what courses they will have that they don't now

4.2 (53 people)

Benefit to learners If it's not about student opportunity, we should not likely pursue it.

4.2 (46 people)

We have yet to see evidence on EXACTLY how the MS/HS proposal will prove fiscally and educationally beneficial for families. This proposal will be a huge disruption for students and families. We need clarity on why we should agree to it.

4.1 (55 people)

The articles are vague and don't actually describe any of the HOW or WHAT. How will this merge actually improve equality/programming and save us money

4.1 (53 people)



THOUGHTS Other



What are the cons of this merger? We have heard all of the perceived pros. I can not make a fully informed decision if I do not hear both sides. The video was an ad for a merger. I should not have to dig to figure out the cons

4.2 (39)

Actual benefits for students? This group hasn't actually be able to articulate any educational benefits for students in this merger. It's all about money and creating new articles.

4.1 (54)



THOUGHTS Facilities



The debt carried by Mt. Abe and the condition of their building is not an acceptable compromise We have maintained our school buildings by agreeing to higher taxes and starting a substantial reserve fund. Bristol has failed all the school improve

3.9 (50)

There are many ways to save money. Merger should not be one of them. How is \$1 million new lobby at MAUHS going to improve student outcomes? The need to not increase overall budget is understood but merger is not the answer. Eliminate academic coaches & others who don't have kid contact.

3.9 (48)

Given the MAUSD's inability to maintain infrastructure as well as the inability to retain towns within their own district to not leave I have concerns Over what the makeup of the merged board would look like. It is also concerning how some ANWSD board members wanted to jump right into a merger.

3.8 (55)

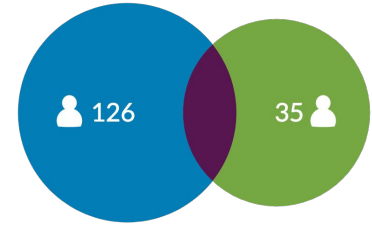
ANWSD buildings seem better maintained then MAUSD. Why would we want to absorb another districts issues /debt/etc ? I want to SEE the numbers

3.8 (54)



DIFFERENCES

Bus Rides | Merging [126 | 35]



Side A

There are ZERO good reasons to do this.

★ 4.5 ★ 1.3

The debt carried by Mt. Abe and the condition of their building is not an acceptable compromise We have maintained our school buildings by agreeing to higher taxes and starting a substantial reserve fund. Bristol has failed all the school improve

★ 4.6 ★ 2.1

Side A/B Common (high)

Until I see administrative cost saving and increased academics for students, this is a nay. Drastic cut in administration. 1 superintendent, 2 assist super, drastic cuts in redundant district staff. More AP classes, 2nd languages, arts. Cut admin, increase student education

★ 4.6 ★ 4.7

I see nothing in the articles about what happens to the 2 superintendents nor District offices. 1 superintendent 1 office at public owned building This is for cost saving measures. Let's cut costs at the top

Side B

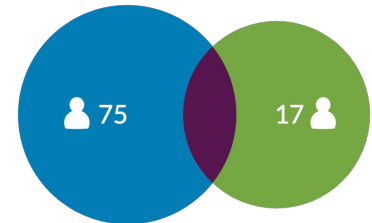
How to increase opportunities for students Choices continue to restrict as enrollments decline - merging resources will allow for more options

★ 2.0 ★ 4.5



DIFFERENCES

Towns [75 | 17]



Side A

All towns must have the right to keep their schools open and this decision must remain with the town alone. A town that loses its community hub withers and shrinks. Loss of tax base will put is into a spiral of decline. Small local schools are critical.

★ 4.9 ★ 1.7

The article on closing an elementary school needs to be changed to no school closed without a vote of the voters within that town. To preserve the vitality of the town by town voters.

★ 4.7 ★ 1.6

Side A/B Common (high)

It would be useful to provide a side-by-side comparison of a merged v non-merged scenario showing tax bills, building use, class sizes, and staffing. These would seem important factors for voters when making decisions.

★ 4.5 ★ 4.6

I see nothing in the articles about what happens to the 2 superintendents nor District offices. 1 superintendent 1 office at public owned building This is for cost saving measures. Let's cut costs at the top.

Side B

This group of participants rated Side A thoughts low. Review the common interest section to see thoughts that both groups rated high.



WRAP UP Next Steps



Thanks for participating

We'll be carefully considering what we learned and sharing our actions back with you.

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
JUNE 30, 2021

	Profile Partnership	Food Service	Vermont Afterschool for All Grants	Rowland Grant - CF	Rowland Grant - CF2	Elementary Fusion Program	Thunder Care	Local Standards Board	ACT 46
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	-	4,966	-	-	-	-	-	295	-
Due from other governments	-	40,042	-	-	-	-	-	-	-
Inventory	-	15,840	-	-	-	-	-	-	-
Due from other funds	-	12,085	-	34,596	5,981	-	40,041	-	11,898
TOTAL ASSETS	\$ -	\$ 72,933	\$ -	\$ 34,596	\$ 5,981	\$ -	\$ 40,041	\$ 295	\$ 11,898
LIABILITIES									
Accounts payable	\$ -	\$ 11,452	\$ -	\$ -	\$ -	\$ -	\$ 4,615	\$ -	\$ -
Accrued expenses	-	-	-	-	-	-	-	-	-
Due to other funds	-	-	-	-	-	-	-	295	-
TOTAL LIABILITIES	-	11,452	-	-	-	-	4,615	295	-
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	18,331	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	18,331	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)									
Nonspendable	-	15,840	-	-	-	-	-	-	-
Restricted	-	27,310	-	34,596	5,981	-	35,426	-	11,898
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	-	43,150	-	34,596	5,981	-	35,426	-	11,898
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ -	\$ 72,933	\$ -	\$ 34,596	\$ 5,981	\$ -	\$ 40,041	\$ 295	\$ 11,898

SCHEDULE E (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	CRF - Child Nutrition Equipment	HUB Childcare - Economic Services	Rowland Grant Honoring Safe Drivers	Rise VT Amplify Grant	Craft Fair	ACT 230	Medicaid	Nellie Mae Foundation VUHS	Medicare EPSDT
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	8,868	-	-	-	-	1,472	17,100	-	11,358
Due from other governments	-	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-	-
Due from other funds	-	-	753	-	3,591	-	51,622	6,500	74,074
TOTAL ASSETS	\$ 8,868	\$ -	\$ 753	\$ -	\$ 3,591	\$ 1,472	\$ 68,722	\$ 6,500	\$ 85,432
LIABILITIES									
Accounts payable	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accrued expenses	-	-	-	-	-	-	-	-	-
Due to other funds	8,868	-	-	-	-	1,472	-	-	-
TOTAL LIABILITIES	8,868	-	-	-	-	1,472	-	-	-
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	-
Restricted	-	-	753	-	3,591	-	68,722	6,500	85,432
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	-	-	753	-	3,591	-	68,722	6,500	85,432
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ 8,868	\$ -	\$ 753	\$ -	\$ 3,591	\$ 1,472	\$ 68,722	\$ 6,500	\$ 85,432

SCHEDULE E (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	Title IA	Signs VUHS	Scotts MG	Middle School Fusion	Title IIA	School Wide Programs	21st Century	Ropes Repair Fund	Childcare Stabilizaton
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	56,238	-	-	-	16,506	-	13,177	-	-
Due from other governments	-	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-	-
Due from other funds	-	-	-	4,407	-	24,336	-	2,768	-
TOTAL ASSETS	<u>\$ 56,238</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,407</u>	<u>\$ 16,506</u>	<u>\$ 24,336</u>	<u>\$ 13,177</u>	<u>\$ 2,768</u>	<u>\$ -</u>
LIABILITIES									
Accounts payable	\$ 2,344	\$ -	\$ -	\$ -	\$ 1,898	\$ 11,593	\$ 598	\$ -	\$ -
Accrued expenses	-	-	-	-	-	12,743	-	-	-
Due to other funds	53,894	-	-	-	14,608	-	12,579	-	-
TOTAL LIABILITIES	<u>56,238</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>16,506</u>	<u>24,336</u>	<u>13,177</u>	<u>-</u>	<u>-</u>
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	-
Restricted	-	-	-	4,407	-	-	-	2,768	-
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	<u>-</u>	<u>-</u>	<u>-</u>	<u>4,407</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>2,768</u>	<u>-</u>
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	<u>\$ 56,238</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,407</u>	<u>\$ 16,506</u>	<u>\$ 24,336</u>	<u>\$ 13,177</u>	<u>\$ 2,768</u>	<u>\$ -</u>

SCHEDULE E (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	Athletics	Scholastic Library Fund VUES	Tennis Program VUES	VSBIT Grants	Library Fund FCS	Education Quality Review	Improving Healthy Outcomes V-Shep	IDEA-B	IDEA-B Preschool
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	-	-	-	-	-	-	-	33,086	1,268
Due from other governments	-	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-	-
Due from other funds	15,275	-	-	-	998	-	-	-	-
TOTAL ASSETS	\$ 15,275	\$ -	\$ -	\$ -	\$ 998	\$ -	\$ -	\$ 33,086	\$ 1,268
LIABILITIES									
Accounts payable	\$ 2,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,528	\$ 190
Accrued expenses	-	-	-	-	-	-	-	9,771	-
Due to other funds	-	-	-	-	-	-	-	17,787	1,078
TOTAL LIABILITIES	2,500	-	-	-	-	-	-	33,086	1,268
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	-
Restricted	12,775	-	-	-	998	-	-	-	-
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	12,775	-	-	-	998	-	-	-	-
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ 15,275	\$ -	\$ -	\$ -	\$ 998	\$ -	\$ -	\$ 33,086	\$ 1,268

SCHEDULE E (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	Band VUES	CDD CRRSA Childcare - Early Ed	PBIS ACS	Music Fund VUES	Professional Development Fund	Nellie Mae Community Grant	Four Winds Schoolyard Habitat - FCS	CDD CRRSA Childcare - School Age FCS	Title IV
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	-	-	-	-	-	-	-	772	7,106
Due from other governments	-	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-	-
Due from other funds	400	645	584	-	-	-	500	5,408	-
TOTAL ASSETS	\$ 400	\$ 645	\$ 584	\$ -	\$ -	\$ -	\$ 500	\$ 6,180	\$ 7,106
LIABILITIES									
Accounts payable	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,370	\$ 190
Accrued expenses	-	-	-	-	-	-	-	-	-
Due to other funds	-	-	-	-	-	-	-	-	6,916
TOTAL LIABILITIES	-	-	-	-	-	-	-	6,370	7,106
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	-
Restricted	400	645	584	-	-	-	500	-	-
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	(190)	-
TOTAL FUND BALANCES (DEFICITS)	400	645	584	-	-	-	500	(190)	-
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ 400	\$ 645	\$ 584	\$ -	\$ -	\$ -	\$ 500	\$ 6,180	\$ 7,106

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	ADAP	VEHI Path Program	CDD CRRSA Childcare - Thundercare	Art Room VUES	Stars	Potato Grant VUES	S125/DCAP Forfeitures Fund	Kitchen Equipment ACS	Children and Summer Care Restart
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	13,512	-	-	-	-	-	-	-	-
Due from other governments	-	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-	-
Due from other funds	-	6,009	2,187	54	881	-	1,501	-	71
TOTAL ASSETS	\$ 13,512	\$ 6,009	\$ 2,187	\$ 54	\$ 881	\$ -	\$ 1,501	\$ -	\$ 71
LIABILITIES									
Accounts payable	\$ 200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 71
Accrued expenses	-	-	-	-	-	-	-	-	-
Due to other funds	13,312	-	-	-	-	-	-	-	-
TOTAL LIABILITIES	13,512	-	-	-	-	-	-	-	71
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	-
Restricted	-	6,009	2,187	54	881	-	1,501	-	-
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	-	6,009	2,187	54	881	-	1,501	-	-
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ 13,512	\$ 6,009	\$ 2,187	\$ 54	\$ 881	\$ -	\$ 1,501	\$ -	\$ 71

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	O and M Project	CRF Summer Meals Program	CRF LEA's Grants	Band/ Music FCS	BEST Project SEL	CRF HVAC Efficiency Vermont	ESSER LEA's Grants	Consolidated Administration
ASSETS								
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Accounts receivable (net of allowance for uncollectibles)	-	-	-	-	-	-	44,920	-
Due from other governments	-	-	-	-	-	-	-	-
Inventory	-	-	-	-	-	-	-	-
Due from other funds	-	-	-	110	-	-	-	675
TOTAL ASSETS	\$ -	\$ -	\$ -	\$ 110	\$ -	\$ -	\$ 44,920	\$ 675
LIABILITIES								
Accounts payable	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,718	\$ 675
Accrued expenses	-	-	-	-	-	-	17,748	-
Due to other funds	-	-	-	-	-	-	19,454	-
TOTAL LIABILITIES	-	-	-	-	-	-	44,920	675
DEFERRED INFLOWS OF RESOURCES								
Prepaid receipts	-	-	-	-	-	-	-	-
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-
FUND BALANCES (DEFICITS)								
Nonspendable	-	-	-	-	-	-	-	-
Restricted	-	-	-	110	-	-	-	-
Committed	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-
TOTAL FUND BALANCES (DEFICITS)	-	-	-	110	-	-	-	-
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ -	\$ -	\$ -	\$ 110	\$ -	\$ -	\$ 44,920	\$ 675

SCHEDULE E (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING BALANCE SHEET - NONMAJOR SPECIAL REVENUE FUNDS
 JUNE 30, 2021

	E911 Compliance Grant ACS	E911 Compliance Grant FCS	E911 Compliance Grant VUES	E911 Compliance Grant VUHS	Nurse Office Contribution FCS	Food Service Equipment	Efficiency Vermont Incentives PC	Student Activities Fund	Total
ASSETS									
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 149,982	\$ 149,982
Accounts receivable (net of allowance for uncollectibles)	1,400	3,847	4,609	7,283	-	-	-	-	247,783
Due from other governments	-	-	-	-	-	-	-	-	40,042
Inventory	-	-	-	-	-	-	-	-	15,840
Due from other funds	-	-	-	-	-	-	-	-	307,950
TOTAL ASSETS	\$ 1,400	\$ 3,847	\$ 4,609	\$ 7,283	\$ -	\$ -	\$ -	\$ 149,982	\$ 761,597
LIABILITIES									
Accounts payable	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 55,942
Accrued expenses	-	-	-	-	-	-	-	-	40,262
Due to other funds	1,400	3,847	4,609	7,283	-	-	-	-	167,402
TOTAL LIABILITIES	1,400	3,847	4,609	7,283	-	-	-	-	263,606
DEFERRED INFLOWS OF RESOURCES									
Prepaid receipts	-	-	-	-	-	-	-	-	18,331
TOTAL DEFERRED INFLOWS OF RESOURCES	-	-	-	-	-	-	-	-	18,331
FUND BALANCES (DEFICITS)									
Nonspendable	-	-	-	-	-	-	-	-	15,840
Restricted	-	-	-	-	-	-	-	149,982	464,010
Committed	-	-	-	-	-	-	-	-	-
Assigned	-	-	-	-	-	-	-	-	-
Unassigned	-	-	-	-	-	-	-	-	(190)
TOTAL FUND BALANCES (DEFICITS)	-	-	-	-	-	-	-	149,982	479,660
TOTAL LIABILITIES AND FUND BALANCES (DEFICITS)	\$ 1,400	\$ 3,847	\$ 4,609	\$ 7,283	\$ -	\$ -	\$ -	\$ 149,982	\$ 761,597

See accompanying independent auditors' report and notes to financial statements.

SCHEDULE F

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
NONMAJOR SPECIAL REVENUE FUNDS
FOR THE YEAR ENDED JUNE 30, 2021

	Profile Partnership	Food Service	Vermont Afterschool for All Grants	Rowland Grant - CF	Rowland Grant - CF2	Elementary Fusion Program	Thunder Care	Local Standards Board	ACT 46
REVENUES									
Intergovernmental revenues	\$ -	\$ 649,612	\$ 25,000	\$ -	\$ -	\$ -	\$ 112,945	\$ -	\$ -
Charges for services	-	25,843	-	-	-	-	71,218	586	-
Other	-	21,031	-	-	-	1,195	500	-	-
TOTAL REVENUES	-	696,486	25,000	-	-	1,195	184,663	586	-
EXPENDITURES									
Other	619	895,341	25,000	418	-	1,195	170,954	586	825
TOTAL EXPENDITURES	619	895,341	25,000	418	-	1,195	170,954	586	825
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES									
	(619)	(198,855)	-	(418)	-	-	13,709	-	(825)
OTHER FINANCING SOURCES (USES)									
Transfers in	-	217,810	-	-	-	-	-	-	-
Transfers (out)	-	-	-	-	-	-	-	-	-
TOTAL OTHER FINANCING SOURCES (USES)	-	217,810	-	-	-	-	-	-	-
NET CHANGE IN FUND BALANCES (DEFICITS)									
	(619)	18,955	-	(418)	-	-	13,709	-	(825)
FUND BALANCES (DEFICITS), JULY 1, RESTATED									
	619	24,195	-	35,014	5,981	-	21,717	-	12,723
FUND BALANCES (DEFICITS), JUNE 30									
	\$ -	\$ 43,150	\$ -	\$ 34,596	\$ 5,981	\$ -	\$ 35,426	\$ -	\$ 11,898

SCHEDULE F (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	CRF - Child Nutrition Equipment	HUB Childcare - Economic Services	Rowland Grant Honoring Safe Drivers	Rise VT Amplify Grant	Craft Fair	ACT 230	Medicaid	Nellie Mae Foundation VUHS	Medicare EPSDT
REVENUES									
Intergovernmental revenues	\$ 146,290	\$ 20,101	\$ -	\$ -	\$ -	\$ 3,412	\$ 126,618	\$ -	\$ 58,279
Charges for services	-	-	-	-	-	-	-	-	-
Other	-	-	-	150	-	-	-	-	-
TOTAL REVENUES	<u>146,290</u>	<u>20,101</u>	<u>-</u>	<u>150</u>	<u>-</u>	<u>3,412</u>	<u>126,618</u>	<u>-</u>	<u>58,279</u>
EXPENDITURES									
Other	146,290	20,101	-	150	-	3,412	99,390	-	24,801
TOTAL EXPENDITURES	<u>146,290</u>	<u>20,101</u>	<u>-</u>	<u>150</u>	<u>-</u>	<u>3,412</u>	<u>99,390</u>	<u>-</u>	<u>24,801</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>27,228</u>	<u>-</u>	<u>33,478</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	-	-	-	-
Transfers (out)	-	-	-	-	-	-	-	-	-
TOTAL OTHER FINANCING SOURCES (USES)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	-	-	-	-	-	-	27,228	-	33,478
FUND BALANCES (DEFICITS), JULY 1, RESTATED	<u>-</u>	<u>-</u>	<u>753</u>	<u>-</u>	<u>3,591</u>	<u>-</u>	<u>41,494</u>	<u>6,500</u>	<u>51,954</u>
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ -</u>	<u>-</u>	<u>\$ 753</u>	<u>\$ -</u>	<u>\$ 3,591</u>	<u>\$ -</u>	<u>\$ 68,722</u>	<u>\$ 6,500</u>	<u>\$ 85,432</u>

SCHEDULE F (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	Title IA	Signs VUHS	Scotts MG	Middle School Fusion	Title IIA	School Wide Programs	21st Century	Ropes Repair Fund	Childcare Stabilizaton
REVENUES									
Intergovernmental revenues	\$ 198,595	\$ -	\$ -	\$ -	\$ 78,406	\$ -	\$ 141,257	\$ -	\$ 17,545
Charges for services	-	-	-	-	-	-	-	-	-
Other	-	-	-	4,150	-	-	-	-	-
TOTAL REVENUES	<u>198,595</u>	<u>-</u>	<u>-</u>	<u>4,150</u>	<u>78,406</u>	<u>-</u>	<u>141,257</u>	<u>-</u>	<u>17,545</u>
EXPENDITURES									
Other	26,173	1,937	94	1,039	76,507	150,737	141,257	1,406	17,545
TOTAL EXPENDITURES	<u>26,173</u>	<u>1,937</u>	<u>94</u>	<u>1,039</u>	<u>76,507</u>	<u>150,737</u>	<u>141,257</u>	<u>1,406</u>	<u>17,545</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>172,422</u>	<u>(1,937)</u>	<u>(94)</u>	<u>3,111</u>	<u>1,899</u>	<u>(150,737)</u>	<u>-</u>	<u>(1,406)</u>	<u>-</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	150,737	-	-	-
Transfers (out)	(172,422)	-	(1)	-	(1,899)	-	-	-	-
TOTAL OTHER FINANCING SOURCES (USES)	<u>(172,422)</u>	<u>-</u>	<u>(1)</u>	<u>-</u>	<u>(1,899)</u>	<u>150,737</u>	<u>-</u>	<u>-</u>	<u>-</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	-	(1,937)	(95)	3,111	-	-	-	(1,406)	-
FUND BALANCES (DEFICITS), JULY 1, RESTATED	-	1,937	95	1,296	-	-	-	4,174	-
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 4,407</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 2,768</u>	<u>\$ -</u>

SCHEDULE F (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	Athletics	Scholastic Library Fund VUES	Tennis Program VUES	VSBIT Grants	Library Fund FCS	Education Quality Review	Improving Healthy Outcomes V-Shep	IDEA-B	IDEA-B Preschool
REVENUES									
Intergovernmental revenues	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 353,600	\$ 2,552
Charges for services	-	-	-	-	-	-	-	-	-
Other	8,973	3,086	-	7,447	2,232	-	-	-	-
TOTAL REVENUES	<u>8,973</u>	<u>3,086</u>	<u>-</u>	<u>7,447</u>	<u>2,232</u>	<u>-</u>	<u>-</u>	<u>353,600</u>	<u>2,552</u>
EXPENDITURES									
Other	11,104	3,086	60	7,790	1,234	3,618	-	353,600	2,552
TOTAL EXPENDITURES	<u>11,104</u>	<u>3,086</u>	<u>60</u>	<u>7,790</u>	<u>1,234</u>	<u>3,618</u>	<u>-</u>	<u>353,600</u>	<u>2,552</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>(2,131)</u>	<u>-</u>	<u>(60)</u>	<u>(343)</u>	<u>998</u>	<u>(3,618)</u>	<u>-</u>	<u>-</u>	<u>-</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	-	-	-	-
Transfers (out)	-	-	-	-	-	-	(942)	-	-
TOTAL OTHER FINANCING SOURCES (USES)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(942)</u>	<u>-</u>	<u>-</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	<u>(2,131)</u>	<u>-</u>	<u>(60)</u>	<u>(343)</u>	<u>998</u>	<u>(3,618)</u>	<u>(942)</u>	<u>-</u>	<u>-</u>
FUND BALANCES (DEFICITS), JULY 1, RESTATED	<u>14,906</u>	<u>-</u>	<u>60</u>	<u>343</u>	<u>-</u>	<u>3,618</u>	<u>942</u>	<u>-</u>	<u>-</u>
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ 12,775</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 998</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>

SCHEDULE F (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	Band VUES	CDD CRRSA Childcare - Early Ed	PBIS ACS	Music Fund VUES	Professional Development Fund	Nellie Mae Community Grant	Four Winds Schoolyard Habitat - FCS	CDD CRRSA Childcare - School Age FCS	Title IV
REVENUES									
Intergovernmental revenues	\$ -	\$ 1,623	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,113	\$ 22,039
Charges for services	-	-	-	-	-	-	-	-	-
Other	400	-	-	-	-	-	-	-	-
TOTAL REVENUES	<u>400</u>	<u>1,623</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>8,113</u>	<u>22,039</u>
EXPENDITURES									
Other	-	978	416	266	750	71	-	8,303	21,345
TOTAL EXPENDITURES	<u>-</u>	<u>978</u>	<u>416</u>	<u>266</u>	<u>750</u>	<u>71</u>	<u>-</u>	<u>8,303</u>	<u>21,345</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>400</u>	<u>645</u>	<u>(416)</u>	<u>(266)</u>	<u>(750)</u>	<u>(71)</u>	<u>-</u>	<u>(190)</u>	<u>694</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	-	-	-	-
Transfers (out)	-	-	-	-	(11)	-	-	-	(694)
TOTAL OTHER FINANCING SOURCES (USES)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(11)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(694)</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	400	645	(416)	(266)	(761)	(71)	-	(190)	-
FUND BALANCES (DEFICITS), JULY 1, RESTATED	-	-	1,000	266	761	71	500	-	-
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ 400</u>	<u>\$ 645</u>	<u>\$ 584</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 500</u>	<u>\$ (190)</u>	<u>\$ -</u>

SCHEDULE F (CONTINUED)

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	ADAP	VEHI Path Program	CDD CRRSA Childcare - Thundercare	Art Room VUES	Stars	Potato Grant VUES	S125/DCAP Forfeitures Fund	Kitchen Equipment ACS	Children and Summer Care Restart
REVENUES									
Intergovernmental revenues	\$ 25,950	\$ 6,526	\$ 13,522	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Charges for services	-	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-	-
TOTAL REVENUES	<u>25,950</u>	<u>6,526</u>	<u>13,522</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>
EXPENDITURES									
Other	39,227	7,053	11,335	607	2,042	44	-	495	11,810
TOTAL EXPENDITURES	<u>39,227</u>	<u>7,053</u>	<u>11,335</u>	<u>607</u>	<u>2,042</u>	<u>44</u>	<u>-</u>	<u>495</u>	<u>11,810</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>(13,277)</u>	<u>(527)</u>	<u>2,187</u>	<u>(607)</u>	<u>(2,042)</u>	<u>(44)</u>	<u>-</u>	<u>(495)</u>	<u>(11,810)</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	-	-	-	-
Transfers (out)	-	-	-	-	-	(6)	-	-	-
TOTAL OTHER FINANCING SOURCES (USES)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(6)</u>	<u>-</u>	<u>-</u>	<u>-</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	(13,277)	(527)	2,187	(607)	(2,042)	(50)	-	(495)	(11,810)
FUND BALANCES (DEFICITS), JULY 1, RESTATED	<u>13,277</u>	<u>6,536</u>	<u>-</u>	<u>661</u>	<u>2,923</u>	<u>50</u>	<u>1,501</u>	<u>495</u>	<u>11,810</u>
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ -</u>	<u>\$ 6,009</u>	<u>\$ 2,187</u>	<u>\$ 54</u>	<u>\$ 881</u>	<u>\$ -</u>	<u>\$ 1,501</u>	<u>\$ -</u>	<u>\$ -</u>

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	O and M Project	CRF Summer Meals Program	CRF LEA's Grants	Band/ Music FCS	BEST Project SEL	CRF HVAC Efficiency Vermont	ESSER LEA's Grants	Consolidated Administration
REVENUES								
Intergovernmental revenues	\$ -	\$ 13,655	\$ 199,952	\$ -	\$ -	\$ 200,914	\$ 159,259	\$ -
Charges for services	-	-	-	-	-	-	-	-
Other	-	-	-	860	-	-	-	-
TOTAL REVENUES	-	13,655	199,952	860	-	200,914	159,259	-
EXPENDITURES								
Other	-	13,655	199,952	750	189	200,914	159,259	24,278
TOTAL EXPENDITURES	-	13,655	199,952	750	189	200,914	159,259	24,278
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	-	-	-	110	(189)	-	-	(24,278)
OTHER FINANCING SOURCES (USES)								
Transfers in	-	-	-	-	-	-	-	24,278
Transfers (out)	(53)	-	-	-	-	-	-	-
TOTAL OTHER FINANCING SOURCES (USES)	(53)	-	-	-	-	-	-	24,278
NET CHANGE IN FUND BALANCES (DEFICITS)	(53)	-	-	110	(189)	-	-	-
FUND BALANCES (DEFICITS), JULY 1, RESTATED	53	-	-	-	189	-	-	-
FUND BALANCES (DEFICITS), JUNE 30	\$ -	\$ -	\$ -	\$ 110	\$ -	\$ -	\$ -	\$ -

ADDISON NORTHWEST SCHOOL DISTRICT

COMBINING SCHEDULE OF REVENUES, EXPENDITURES AND CHANGES IN FUND BALANCES
 NONMAJOR SPECIAL REVENUE FUNDS
 FOR THE YEAR ENDED JUNE 30, 2021

	E911 Compliance Grant ACS	E911 Compliance Grant FCS	E911 Compliance Grant VUES	E911 Compliance Grant VUHS	Nurse Office Contribution FCS	Food Service Equipment	Efficiency Vermont Incentives PC	Student Activites Fund	Total
REVENUES									
Intergovernmental revenues	\$ 1,400	\$ 3,847	\$ 4,609	\$ 7,283	\$ -	\$ -	\$ -	\$ -	\$ 2,602,904
Charges for services	-	-	-	-	-	-	-	-	97,647
Other	-	-	-	-	1,100	1,295	-	38,912	91,331
TOTAL REVENUES	<u>1,400</u>	<u>3,847</u>	<u>4,609</u>	<u>7,283</u>	<u>1,100</u>	<u>1,295</u>	<u>-</u>	<u>38,912</u>	<u>2,791,882</u>
EXPENDITURES									
Other	1,400	3,847	4,609	7,283	1,097	1,295	2,746	41,789	2,956,626
TOTAL EXPENDITURES	<u>1,400</u>	<u>3,847</u>	<u>4,609</u>	<u>7,283</u>	<u>1,097</u>	<u>1,295</u>	<u>2,746</u>	<u>41,789</u>	<u>2,956,626</u>
EXCESS OF REVENUES OVER (UNDER) EXPENDITURES	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>3</u>	<u>-</u>	<u>(2,746)</u>	<u>(2,877)</u>	<u>(164,744)</u>
OTHER FINANCING SOURCES (USES)									
Transfers in	-	-	-	-	-	-	-	-	392,825
Transfers (out)	-	-	-	-	(3)	-	-	-	(176,031)
TOTAL OTHER FINANCING SOURCES (USES)	<u>-</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>(3)</u>	<u>-</u>	<u>-</u>	<u>-</u>	<u>216,794</u>
NET CHANGE IN FUND BALANCES (DEFICITS)	-	-	-	-	-	-	(2,746)	(2,877)	52,050
FUND BALANCES (DEFICITS), JULY 1, RESTATED	-	-	-	-	-	-	2,746	152,859	427,610
FUND BALANCES (DEFICITS), JUNE 30	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 149,982</u>	<u>\$ 479,660</u>

See accompanying independent auditors' report and notes to financial statements.

MOUNT ABRAHAM UNIFIED SCHOOL DISTRICT

COMBINING SCHEDULE OF NET POSITION - FIDUCIARY FUNDS - PRIVATE PURPOSE TRUST
 JUNE 30, 2021

	Acker Fund	Brennan Scholarship	Clark Memorial Scholarship	Danforth Scholarship	Farr (Eliz) Scholarship	Hall Memorial Scholarship	Hanks Fund	Lincoln Trust
ASSETS								
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,950	\$ -
Investments	-	3,598	-	6,271	13,701	-	-	19,291
Due from other governments	701	-	-	-	-	6,160	-	-
TOTAL ASSETS	<u>\$ 701</u>	<u>\$ 3,598</u>	<u>\$ -</u>	<u>\$ 6,271</u>	<u>\$ 13,701</u>	<u>\$ 6,160</u>	<u>\$ 2,950</u>	<u>\$ 19,291</u>
LIABILITIES								
Due to other governments	\$ -	\$ 1,000	\$ -	\$ -	\$ 1,000	\$ -	\$ -	\$ -
TOTAL LIABILITIES	<u>-</u>	<u>1,000</u>	<u>-</u>	<u>-</u>	<u>1,000</u>	<u>-</u>	<u>-</u>	<u>-</u>
NET POSITION								
Restricted	701	2,598	-	6,271	12,701	6,160	2,950	19,291
TOTAL NET POSITION	<u>701</u>	<u>2,598</u>	<u>-</u>	<u>6,271</u>	<u>12,701</u>	<u>6,160</u>	<u>2,950</u>	<u>19,291</u>
TOTAL LIABILITIES AND NET POSITION	<u>\$ 701</u>	<u>\$ 3,598</u>	<u>\$ -</u>	<u>\$ 6,271</u>	<u>\$ 13,701</u>	<u>\$ 6,160</u>	<u>\$ 2,950</u>	<u>\$ 19,291</u>

SCHEDULE G (CONTINUED)

MOUNT ABRAHAM UNIFIED SCHOOL DISTRICT

COMBINING SCHEDULE OF NET POSITION - FIDUCIARY FUNDS - PRIVATE PURPOSE TRUST
JUNE 30, 2021

	BES Marshall Fund	MCS Marshall Fund	MTA Marshall Scholarship	Royce Memorial Scholarship	Scribner Scholarship	Warner Scholarship	Roberts Foreign Language Scholarship	MTA Desorda Scholarship	MTA Matchematics Scholarship	Total
ASSETS										
Cash and cash equivalents	\$ -	\$ -	\$ -	\$ 2,108	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,058
Investments	40,559	52,022	120,571	4,589	33,465	144,713	155,685	7,726	127,381	729,572
Due from other governments	-	-	-	-	150	-	-	100	-	7,111
TOTAL ASSETS	<u>\$ 40,559</u>	<u>\$ 52,022</u>	<u>\$ 120,571</u>	<u>\$ 6,697</u>	<u>\$ 33,615</u>	<u>\$ 144,713</u>	<u>\$ 155,685</u>	<u>\$ 7,826</u>	<u>\$ 127,381</u>	<u>\$ 741,741</u>
LIABILITIES										
Due to other governments	\$ 326	\$ 1,510	\$ 1,000	\$ -	\$ -	\$ 1,000	\$ 5,000	\$ -	\$ -	\$ 10,836
TOTAL LIABILITIES	<u>326</u>	<u>1,510</u>	<u>1,000</u>	<u>-</u>	<u>-</u>	<u>1,000</u>	<u>5,000</u>	<u>-</u>	<u>-</u>	<u>10,836</u>
NET POSITION										
Restricted	40,233	50,512	119,571	6,697	33,615	143,713	150,685	7,826	127,381	\$ 730,905
TOTAL NET POSITION	<u>40,233</u>	<u>50,512</u>	<u>119,571</u>	<u>6,697</u>	<u>33,615</u>	<u>143,713</u>	<u>150,685</u>	<u>7,826</u>	<u>127,381</u>	<u>730,905</u>
TOTAL LIABILITIES AND NET POSITION	<u>\$ 40,559</u>	<u>\$ 52,022</u>	<u>\$ 120,571</u>	<u>\$ 6,697</u>	<u>\$ 33,615</u>	<u>\$ 144,713</u>	<u>\$ 155,685</u>	<u>\$ 7,826</u>	<u>\$ 127,381</u>	<u>\$ 741,741</u>

See accompanying independent auditors' report and notes to financial statements.

MOUNT ABRAHAM UNIFIED SCHOOL DISTRICT

COMBINING STATEMENT OF CHANGES IN NET POSITION - FIDUCIARY FUNDS - PRIVATE PURPOSE TRUST
FOR THE YEAR ENDED JUNE 30, 2021

	Acker Fund	Brennan Scholarship	Clark Memorial Scholarship	Danforth Scholarship	Farr (Eliz) Scholarship	Hall Memorial Scholarship	Hanks Fund	Lincoln Trust
ADDITIONS								
Interest income	\$ -	\$ 97	\$ -	\$ 174	\$ 347	\$ -	\$ -	\$ 495
Realized/unrealized gain/(loss) on investments, net	-	534	-	1,031	1,779	-	-	2,585
TOTAL ADDITIONS	-	631	-	1,205	2,126	-	-	3,080
DEDUCTIONS								
Distributions	-	500	-	-	-	1,000	-	-
TOTAL DEDUCTIONS	-	500	-	-	-	1,000	-	-
NET CHANGE IN NET POSITION	-	131	-	1,205	2,126	(1,000)	-	3,080
NET POSITION - JULY 1, RESTATED	701	2,467	-	5,066	10,575	7,160	2,950	16,211
NET POSITION - JUNE 30	\$ 701	\$ 2,598	\$ -	\$ 6,271	\$ 12,701	\$ 6,160	\$ 2,950	\$ 19,291

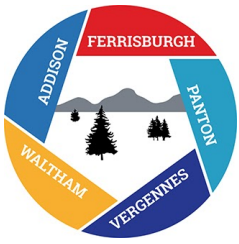
STATEMENT H (CONTINUED)

MOUNT ABRAHAM UNIFIED SCHOOL DISTRICT

COMBINING STATEMENT OF CHANGES IN NET POSITION - FIDUCIARY FUNDS - PRIVATE PURPOSE TRUST
FOR THE YEAR ENDED JUNE 30, 2021

	BES Marshall Fund	MCS Marshall Fund	MTA Marshall Scholarship	Royce Memorial Scholarship	Scribner Scholarship	Warner Scholarship	Roberts Foreign Language Scholarship	MTA Desorda Scholarship	MTA Mathamatics Scholarship	Total
ADDITIONS										
Interest income	\$ 1,077	\$ 1,382	\$ 3,311	\$ -	\$ 870	\$ 3,930	\$ 4,040	\$ 43	\$ 800	\$ 16,566
Realized/unrealized gain/(loss) on investments, net	5,956	7,661	18,819	-	5,167	22,051	22,634	(43)	(970)	87,204
Other	-	-	-	-	1,000	-	-	7,726	127,551	136,277
TOTAL ADDITIONS	<u>7,033</u>	<u>9,043</u>	<u>22,130</u>	<u>-</u>	<u>7,037</u>	<u>25,981</u>	<u>26,674</u>	<u>7,726</u>	<u>127,381</u>	<u>240,047</u>
DEDUCTIONS										
Distributions	115	152	4,000	-	-	4,000	5,000	(100)	-	14,667
TOTAL DEDUCTIONS	<u>115</u>	<u>152</u>	<u>4,000</u>	<u>-</u>	<u>-</u>	<u>4,000</u>	<u>5,000</u>	<u>(100)</u>	<u>-</u>	<u>14,667</u>
NET CHANGE IN NET POSITION	6,918	8,891	18,130	-	7,037	21,981	21,674	7,826	127,381	225,380
NET POSITION - JULY 1, RESTATED	<u>33,315</u>	<u>41,621</u>	<u>101,441</u>	<u>6,697</u>	<u>26,578</u>	<u>121,732</u>	<u>129,011</u>	<u>-</u>	<u>-</u>	<u>505,525</u>
NET POSITION - JUNE 30	<u>\$ 40,233</u>	<u>\$ 50,512</u>	<u>\$ 119,571</u>	<u>\$ 6,697</u>	<u>\$ 33,615</u>	<u>\$ 143,713</u>	<u>\$ 150,685</u>	<u>\$ 7,826</u>	<u>\$ 127,381</u>	<u>\$ 730,905</u>

See accompanying independent auditors' report and notes to financial statements.



Our District, Our Future *Frequently Asked Questions 2020-21*

The following lists of common questions and answers are provided in reference to the on-going work of the ANWSD as we engage in long-range facility and financial planning. We will continue to update the list as more information is developed or available. The questions are grouped into themes where possible and are not listed in any particular order. Thank you for your engagement on this topic.

Please forward your questions to Superintendent Sheila Soule ssoule@anwsd.org

[Table of Contents \(click the blue link to go to section\)](#)

1. [Budget Related Questions](#)
 2. [In-District Options](#)
 3. [Questions about the MAUSD Merger/ Consolidation Options](#)
 4. [Other](#)
-

Budget Related Questions

- **Every year it feels like we are being told that if we do this (closing Addison or cutting programs) we will have saved money...yet when we come to another budget year, there is a new crisis. When is enough, enough?**

Over the past two years, ANWSD has presented information that has shown that despite making big changes and sacrifices our declining enrollment will continue to have a compounding effect on our per-pupil costs.

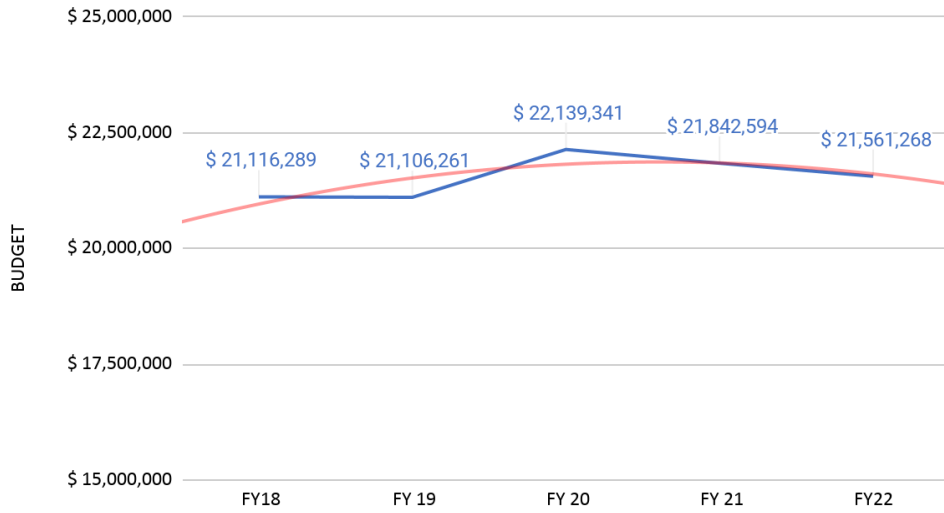
Currently, we know that we will need to cut approximately \$5M from the next four 4 budgets in order to stay below the projected threshold and avoid tax penalties. That equates to 40 fewer positions in our district by the year 2026. That is a 21% decrease in staff from current staffing. This will have a drastic effect on programming options in the district and will most likely mean school closure to compensate for fewer staff.

- **Why did the budget increase more rapidly in FY18 after the last round of unification/consolidation? What is different about this round of consolidation that would save money, when it seems to have increased the budget in the past?**

The ANWSD budgets have not increased dramatically and in fact are likely lower than what they would have been had the voters not merged. The total budget has stayed within 1% of the 2018 budget over the past four budget cycles. Since 2018 we have actually reduced 32 positions, yet despite that taxes have continued to go up and the budget remains relatively flat. The cost for goods and services during that time period has increased. The major contributing factors include the cost of health care, contracted services (e.g. transportation) and wages. Merger would provide an opportunity to reduce overhead, maintain or even grow programs, and provide economy of scale to bring down per pupil expenditures.

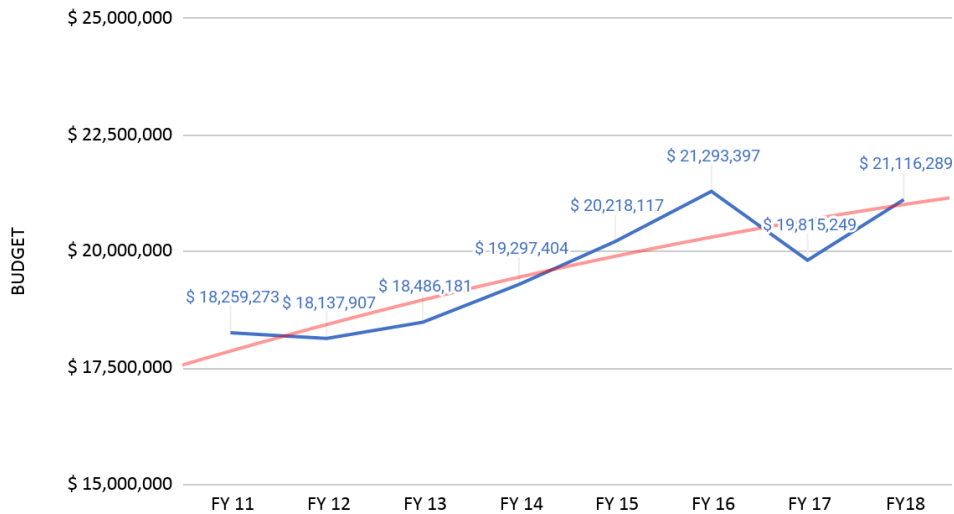
This chart shows the total expense budget (including the proposed FY22 budget) since the merger in FY18. Since merger we have been able to flatten growth through strategic budgeting and district-wide consolidation.

ANWSD SINCE MERGER FY18- PRESENT



This chart shows the historical budget amounts from FY11- FY18 (Merger). You can see how the red trendline compares with the trendline above.

ANWSD HISTORICAL BUDGETS FY11-FY18



- **I have heard that the Central Office Budget has increased since merger- is that true?**

Before the merger, each school had a budget and there was also a Supervisory Union budget for expenses shared by the four school districts in the Supervisory Union. The Central Office budget was then incorporated into each school district budget for approval by the voters. After the merger, it no longer became necessary to distinguish between a school district expense budget and a central office/district wide expense budget, and many things were shifted out of the school budgets to a districtwide code making it appear as if central office line items had increased (e.g. Technology Services, Operations and Maintenance). There are 11 people that work in the Central Office building as compared to 13 in 2018.

- **What are the projected future changes to the VT per-pupil budget thresholds? Could this potentially give us more "breathing room"?**

Unfortunately the State does not give us estimates of thresholds for future years, they only publish one estimate in the Fall for the subsequent budget year, and then it can change by the times budgets are adopted. We estimate the thresholds when we project by looking at the trend of prior years. The thresholds tend to increase each year, but the rate at which they rise is not enough to keep up with our declining enrollment. It is unlikely the State will raise thresholds enough to make a huge difference in our situation.

In-District Options

- **What is the purpose of merging or changing configurations....saving money or saving programs?**

To help navigate this question the board has established the following list of priorities:

- Maintain (or grow) programming
- Costs reasonable for taxpayers
- Offer stability to students and staff by identifying a more permanent structure to support the district into the future

Identifying a path forward that provides for these criteria to be met is the work ahead.

- **Consider starting with closing the central office, many are currently working from home, do we need to spend money on a building?**

The Central Office will move into a school building once a long-term plan for the district can be identified. The cost to appropriately retrofit space suitable for the work and to ensure safety of students in whatever building we move to is top priority. It is costly, time consuming and causes disruption to our workflow so we do not want to move more than once. The cost for rent for the Central Office is \$61K, approximately .2% (.002) of the overall budget and less than the cost to move and renovate space. Working from home is a temporary solution to our present circumstance but is not a long-term solution. Many tasks cannot be performed from home; such as processing payroll and invoices, processing new hires, etc We also need regular access to files that are stored in the central office and have many face to face meetings and interactions that are important to the organization.

- **Is School Choice an option for ANWSD students?**

The board has received preliminary information about tuitioning our High School students. This option decreases our level funded budget in year one by approximately \$600,000. When we project the savings out over the next four years we expect that this option would not prevent taxes from rising, however, taxes would be lower than other scenarios and likely not above the spending threshold. Like the MAUSD merger option- this option would help ensure students had continued access to high quality programming.

MAUSD Merger/ Consolidation Options

- **If the MAUSD needs extensive repairs to the high school, are the savings actually still there?**

While it is true that a merger would mean assuming responsibility for the facility needs of the MAUSD, the same is also true in reverse; MAUSD would take on the shared responsibility for paying off the debt incurred from our past facility upgrades and any the future needs like those anticipated at our Ferrisburgh facility. All buildings have operational costs and infrastructure needs over time. The combined district made up of all ten towns would assume the responsibility for all facilities in both districts and would also gain the value of these facilities as assets. ANWSD community members are likely unaware that MAUSD has budgeted \$1M per year over the past four years to help offset some of the existing building needs and they have continued to make significant improvements to the facility. [\(see link\)](#)

- **If we merge with Mt.Abe, is closing Ferrisburgh off the table?**

The NESDEC study provided the board with considerations that included a merger with MAUSD while not changing the PreK-5th grade operations in ANWSD, and they offered considerations within ANWSD that did change grade configurations and close schools. There were not options for consideration that did both. That does not mean the board couldn't or wouldn't consider this- but currently, there is not an option under consideration that does both.

- **How many ANW positions would be eliminated due to a merger? Might there be fewer jobs lost if we combine?**

Merging eliminates approximately 42 positions (*23 high school teachers, 11 central office positions, and 8.5 middle school positions*). How many of those are individuals currently employed by MAUSD and how many are currently employed by ANWSD would largely depend on seniority. While the notion of preserving jobs in our community is important, saving (even building new) programs and educational opportunities for students would be the true benefit of merging. Reducing staff is the only way to impact educational spending in either district because staffing makes up almost 70% of our overall budget.

- **Why are we not including Addison Central School District in the conversations? Wouldn't it make sense to have a regional high school and merge all three districts?**

It may make sense for there to be only one school district in Addison county at some point in the future, this is a first step in that direction. MAUSD and ANWSD already have many examples of successful collaboration which makes this possibility viable- we share a football team for example, and we have a highly successful food service collaborative operating across the two districts. The timing is right for the two districts to study this option and see if there is a path worth pursuing at this time.

- **Have we considered merging with Mount Abe district but having two 5-12 schools and two elementary schools?**

The projected savings in the proposed model come from reducing staff and consolidating programming and co-curricular activities.. In order to realize those savings the grade levels across the two districts have to merge. Otherwise it would not be much different from the current configuration in terms of cost.

- **How would staffing reductions be determined if a merger happened?**

Typically a process is developed to crosswalk the years of service into one common list to determine seniority. The Union and the newly merged board would work together to develop a new collective bargaining agreement that would address these issues.

- **Can MAUSD High School students fit in the VUHS building rather than the other way around?**

VUHS currently houses 460 including both the middle and high school students. In 2004 (at its peak) VUHS housed 703 students in grades 7-12. Mt Abe currently houses 659, and in 2004 housed 979 students in grades 7-12. The combined projected enrollment of MAUSD and ANWSD grades 9-12 students is (ironically) 703 in school year 2023-24! The enrollment is projected to continue to decline at the HS level and by 2029-2030 is projected at only 578 as a combined total. The issue of "best fit" would be further explored through a study committee.

<u>Mt. Abe 7-12 2020-21</u>	<u>VUHS 7-12 2020-21</u>
<ul style="list-style-type: none"> ● 701 Students ● Capacity 970 ● 72% Capacity 	<ul style="list-style-type: none"> ● 460 Students ● Capacity 876 ● 52% Capacity
Projected Enrollment 2024 (703)	
9-12 Mt. Abe 436	9-12 VUHS 267
Projected Enrollment 2030 (578)	
9-12 Mt. Abe 353	9-12 VUHS 225

- **Can superintendent offices merge (mt abe and ANWSD) and operate as 1 central office with one superintendent. What would it look like? How much money would it save?**

If the two districts merged, one central office would close which is approximately 11 positions. It would save approximately \$1.1M annually. In order to achieve efficiencies and reduce staffing, the districts would need to merge into a single school district. Combining as a Supervisory Union operating as two separate districts would not reduce the same amount of positions and would not yield the same savings.

Other

- **Can we defer this decision by 1-2 years to get more data on the impact of 1) emigration to Vermont (due to COVID-19 and the climate crisis)? and/or 2) the impact of COVID-19 distancing requirements?**

Delaying consideration of these options for one year means we will need to reduce approximately ten positions per year which will significantly impact programming options. In order to bring our district back below the threshold and avoid penalties and reductions we would need to see an increase of 255 students before the school year 2026. Given that enrollment is projected to continue declining all across the northeast it is unlikely we could gain back 30% of our enrollment in a short amount of time. 2019 Housing permit data from our five town community showed only 27 single family units, and there are currently only 3 permits in 2020.

- **How can we make our towns more attractive so more people will move here?**

One of the most important considerations a family makes when considering a move to the community is the quality of schools. While the quality of education in our schools is noteworthy, it is also known that our schools are facing a fiscal crisis and uncertainties. We can position our community to begin to build a new school district that provides robust support and opportunities for our students in a way that is financially sustainable will be attractive to new families.

- **If in the event that Mount Abe has to close regardless, might it be better to absorb their students into VUHS, and then consider having a K-8 model at VUES and FCS.**

If a High School chooses to tuition students instead of operating a public high school they can work to designate a specific receiving school/schools or offer choice to students. We would not necessarily have any influence over the MAUSD decision to decide to offer choice or how they would choose to implement the model. The outcome of this hypothetical situation would likely not be in a timely enough way to impact our need to make significant reductions to our budget.

- **Can schools just offer more online learning opportunities to avoid closure or merger?**

While an online education can be an effective alternative for some students and may provide access to courses that might otherwise be unavailable, it places a greater responsibility on the student to be independent and self-directed and as a result is an inappropriate learning environment for all learners. Furthermore, it is limiting from an engagement perspective, as students benefit from the social

aspects of learning which are developmentally critical for adolescent learners and provide for a more meaningful experience than can be obtained through online learning only. In order to maintain a robust and comprehensive learning environment, a high school should offer a full array of experiences.

- **I am concerned that the loss of dozens of jobs in Addison County over the next few years could further accelerate the demographic problems that these cuts are intended to address. Has there been research or modeling done about how these job losses across districts could impact the county economy and demographics over the coming years/decades?**

Jobs will be lost in either scenario simply because tax increases to maintain current staffing levels are not sustainable, and because there will be a loss of more than 100 students in ANWSD by 2026 requiring fewer staff. We will need to reduce staff no matter what and we risk losing entire programs and extra-curricular opportunities if we do not strategically address these issues through a change in Governance structure (a.k.a. merger). Declining enrollment is a statewide/ New England problem not a county by county vying for students. [Please click here for more information about enrollment and State/New England trends](#)

- **Does anyone know if the state/county is looking at the deficit of affordable housing? That could help keep our kids in state and draw families to Vermont.**

It is clear that job creation and affordable housing across all of Vermont must remain priorities for the State however, it is also important that we continue to map a course of action to avoid drastic tax increases or program cuts. We would need 255 students to move into our district by 2026 to avoid the impacts of declining enrollment and associated revenue shortfalls.

- **Who has the authority to merge school districts?**

Community Authority

Five-Town Electorate Approves Budget Amount to Operate District
Five-Town Electorate Approves a Merger w/MAUSD

ANWSD Board Authority

Determines What to Ask Community to Vote On
Repurpose Schools
Determines Need to Close Schools (after July 1 2021)
Determines Budget Amount to Put Before Voters
Decides Whether or Not to Form a Merger Study Committee

Superintendent Authority

Determines How to Spend Money Approved by Voters