

DESCRIPTION OF SERVICES AND SCOPE OF WORK. The Consultant will conduct analysis and provide recommendations for updates to the new education funding structure established by Act 73; a cost-function foundation formula (the “foundation formula”). The Consultant shall perform the following tasks:

Task 1. Recommend updates to special education weights in the cost-function foundation formula established by Act 73 to move from special education weights based upon disability categories to a reliance on the provision of special education services.

The recommended updates shall include a detailed explanation including the data and methodologies used in analysis.

Task 2. Recommend updates to any other weights in the foundation formula determined to be empirically necessary for an adequate and equitable education, taking into account cost savings generated by new, larger consolidated districts.

The Consultant shall clearly explain benchmark(s) used to determine an adequate and equitable education in the analysis. The Consultant shall also clearly identify and explain the estimated cost savings from new district configurations.

The Consultant shall include detailed explanations of findings and recommendations as well as detailed explanations of data, methodologies, and underlying assumptions used in the analysis.

Task 3. Recommend suitable geographic measures for determining sparsity within the foundation formula.

The Consultant shall include detailed explanations of findings and recommendations as well as detailed explanations of data, methodologies, and underlying assumptions used in the analysis.

Task 4. Determine whether it costs more to educate a secondary student than an elementary student in Vermont and, if so, recommend an appropriate weight to capture the cost differential.

The Consultant shall include detailed explanations of findings and recommendations as well as detailed explanations of data, methodologies, and underlying assumptions used in the analysis.

Task 5. Recommend how to account for the provision of Career and Technical Education (CTE) within Vermont's funding formula.

In its recommendations, Consultant will clearly describe how they would recommend CTE be included within the funding formula, including a recommended financing streams (e.g. tuition, categorical aid, etc.) as well as recommended funding amount(s). The recommendations will include detailed a detailed explanation that includes all data, methodology, and underlying assumptions used in the analysis.

Task 6. Recommend updates or changes to other components of the foundation formula, including the base amount, that would be required as a consequence of any recommendations from Tasks 1 – 5.

The Consultant shall clearly identify components that should be updated or changed; recommended changes; and the rationale for recommended changes. This shall include detailed explanations of findings and recommendations as well as detailed explanations of data, methodologies, and underlying assumptions used in the analysis. The Consultant shall also identify which components and recommended changes are dependent on other recommendations coming into effect.

Task 7. Train JFO and Agency of Education (AOE) staff to update Consultant-identified analyses in the future.

The Consultant shall clearly identify the weights, factors, and analyses performed in Tasks 1-6 that will need to be updated in future years. The Consultant shall set out a recommended schedule for such updates.

The Consultant shall provide written documentation of all methodologies at a level of detail sufficient to ensure replicability of results, and shall be responsible in training JFO and AOE staff to replicate and update results in the future.

Task 8. Provide legislative testimony presenting findings.

The Consultant shall provide legislative testimony during the 2027 legislative session. JFO shall work with the Consultant to identify the timing of legislative testimony, the Consultant shall remain responsible for delivery of all content and testimony in a timely manner.

The tasks outlined in this section represent the minimum obligation from the Consultant, and shall not limit the Consultant's ability to recommend additional updates or changes not explicitly specified. If the Consultant recommends that additional analysis be conducted outside the scope of the Contract, the Consultant shall clearly identify the additional analysis or topics to JFO in writing.

Ongoing conversations throughout the course of the Contract are encouraged, and the parties may agree to adjust the tasks and Scope of Work.