

**REGULAR MEETING OF RSU NO. 5 BOARD OF DIRECTORS**  
**WEDNESDAY– OCTOBER 23, 2019**  
**POWNALE ELEMENTARY SCHOOL - CAFETERIA**  
**6:30 P.M. REGULAR SESSION**  
**AGENDA**

1. Call to Order:  
The meeting was called to order at \_\_\_\_\_ p.m. by Chair Michelle Ritcheson
2. Attendance:

____ Kathryn Brown	____ Maura Pillsbury
____ Jeremy Clough	____ Michelle Ritcheson
____ Candace deCsiptes	____ Lindsay Sterling
____ Lindsey Furtney	____ Valeria Steverlynck
____ Jennifer Galletta	____ Madelyn Vertenten
____ Elisabeth Munsen	____ Rhea Fitzpatrick – Student Representative
	____ Liam Hornschild-Bear – Student Representative
3. Pledge of Allegiance:
4. Consideration of Minutes:  
A. Consideration and approval of the Minutes of October 9, 2019 as presented barring any errors or omissions.  
  
Motion: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ Vote: \_\_\_\_\_
5. Adjustments to the Agenda:
6. Good News & Recognition:  
A. Report from Board's Student Representative (10 Minutes)  
B. Good News from Pownal Elementary School – Lisa Demick (10 Minutes)
7. Public Comments: (10 Minutes)
8. Reports from Superintendent:  
A. Items for Information (10 Minutes)
  1. District Happenings
9. Administrator Reports:  
A. Pownal Elementary School Goal Review – Lisa Demick (20 Minutes)  
B. Capital Improvement Plan – Dennis Ouellette (20 Minutes)  
C. Finance – Michelle Lickteig (3 Minutes)
10. Board Comments and Committee Reports:  
A. Board Information Exchange and Agenda Requests (10 Minutes)  
B. Finance Committee (2 Minutes)  
C. Strategic Communications (2 Minutes)  
D. Policy Committee (2 Minutes)

11. Policy Review:

A. Consideration and approval of the following Policies (1<sup>st</sup> Read) (10 Minutes)

1. IMGA – Service Animals in Schools

Motion: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ Vote: \_\_\_\_\_

B. Consideration and approval of the following Policies (2<sup>nd</sup> Read) (5 Minutes)

1. ADA – School System Goals and Objectives
2. BCA – Board of Directors Member Code of Ethics
3. JIC – System-Wide Student Code of Conduct
4. JJIF – Student Concussions and Other Head Injuries
5. JJIF-E – RSU5 Concussion Information Sheet

Motion: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ Vote: \_\_\_\_\_

12. Unfinished Business:

A. Presentation of the Finance Committee Recommended Cost Sharing Methodology (60 Minutes)

13. New Business:

14. Personnel:

A. Consideration and approval to employ a Director of Finance and Human Resources for the 2019-2020 school year.

Motion: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ Vote: \_\_\_\_\_

15. Public Comments: (10 Minutes)

16. Adjournment:

Motion: \_\_\_\_\_ 2<sup>nd</sup>: \_\_\_\_\_ Vote: \_\_\_\_\_ Time: \_\_\_\_\_

**RSU No. 5 Board of Directors Meeting  
Wednesday, October 9, 2019 – 6:30 p.m.  
Mast Landing School - Cafeteria  
Meeting Minutes**

Item # 4.

(NOTE: These Minutes are not official until approved by the Board of Directors. Such action, either to approve or amend and approve, is anticipated at the October 23, 2019 meeting).

**1. CALLED TO ORDER:**

Chair Michelle Ritcheson called the meeting to order at 6:35 p.m.

**2. MEMBERS PRESENT:** Kathryn Brown, Jeremy Clough, Candace deCsipkes, Lindsey Furtney, Jennifer Galletta, Elisabeth Munsen, Maura Pillsbury, Michelle Ritcheson, Lindsay Sterling, Valeria Steverlynck, Madelyn Vertenten, Liam Hornschild-Bear, Student Representative.

**MEMBERS ABSENT:** None

**3. PLEDGE OF ALLEGIANCE:**

**4. CONSIDERATION OF MINUTES:**

**A. VOTED:** To approve the Minutes of September 25, 2019 as presented.  
(Steverlynck - Pillsbury) (11 – 0) The student representative voted with the majority.

**5. ADJUSTMENTS TO THE AGENDA:**

None

**6. GOOD NEWS AND RECOGNITION:**

- A. Report from Board's Student Representative
- B. Good News from Mast Landing School – Emily Grimm

**7. PUBLIC COMMENT:**

None

**8. REPORTS FROM SUPERINTENDENT:**

None

**9. ADMINISTRATOR REPORTS:**

- A. Mast Landing School Goal Review – Emily Grimm

**10. BOARD COMMENTS AND COMMITTEE REPORTS:**

Maura Pillsbury announced Region Ten has an opening for a Pre-Engineering Instructor.

**11. POLICY REVIEW:**

None

**12. UNFINISHED BUSINESS:**

- A. Discussion – Board members on committees

**13. NEW BUSINESS:**

None

**14. PERSONNEL:**

None

**15. PUBLIC COMMENT:**

Kevin Nadeau, Durham  
Sarah Tracy, Freeport

**16. ADJOURNMENT:**

**VOTED:** To adjourn at 8:24 p.m. (Steverlynck - Brown) (11 – 0) The student representative voted with the majority.

  
Becky L. Foley, Superintendent of Schools

**PES School Goals 2018-2019****School: Pownal Elementary School****Team Members: PES staff****District Goal: Focus on Student Achievement through Improved Student-Centered Teaching and Learning**

<b>Goals</b>	<b>Strategies and Action Steps</b>	<b>Responsibility</b>	<b>Evidence of Effectiveness</b>
Increase reading proficiency and progress as demonstrated by an increase in the percentage of students rated proficient and meeting their growth targets in reading.	<ul style="list-style-type: none"> <li>Expand effective strategies for critical thinking through interactive read aloud, partnerships, and book clubs to target instruction focused on inferential and analytical comprehension. Attend to level of transfer</li> <li>Unpack Fountas &amp; Pinnell Literacy Continuum to examine correlation/support of district curriculum</li> <li>Jen Winkler to TC Foundational Skills Institute</li> <li>Implement pre kindergarten phonics program</li> <li>Implement TC Phonics Units of Study in kindergarten</li> <li>Implement Orton Gillingham Intensive Reading Tutoring for select cohort</li> </ul>	Lisa Demick, Gigi MacAllister, classroom teachers, Hilary Massicotte, Sara Martin	<p>K-2 students who meet their Fountas &amp; Pinnell reading targets from 46% to 70% <b>2019 results 42%</b></p> <p>3-5 ELA MEA- Percent of students meeting their growth targets increase by 10% <b>Tentative 2019 results: 20% increase</b></p> <p>NWEA proficiency level increases from 72% to 80% <b>NWEA proficiency dropped to 65%</b></p> <p>50% of students participating in the Orton Gillingham Cohort met their growth targets</p>
Increase student agency and achievement through public demonstrations of learning.	<ul style="list-style-type: none"> <li>Use video modeling to demonstrate progress</li> <li>Increase student goal setting and data tracking</li> <li>Clarify kid-friendly success criteria using student examples</li> </ul>	PES staff	<p><b>Classroom walkthroughs</b> 100% of staff report use of walkthroughs lead to immediate implementation of use of visuals to support success criteria and goal setting</p>

	<ul style="list-style-type: none"> <li>● Establish assembly protocols to celebrate achievement, mindset, and progress</li> <li>● Expand mentoring/cross grade level student demonstrations of metacognitive practices</li> </ul>		<p><b>Student survey data</b></p> <p>66% of 3rd-5th grade students report they know their goals and how to reach them most of the time or all of the time.</p> <p>All 4th and 5th grade students had the opportunity to participate as peer mentors on the playground or in primary PE classes.</p>
Build faculty collegiality and networking opportunities.	<ul style="list-style-type: none"> <li>● Provide cross building observations for new teachers at least 3 times this year</li> <li>● Dedicate 4 staff meetings to wellness activities</li> <li>● Establish personalized professional development opportunities at at least 4 staff meetings this year</li> </ul>	<p>Leadership Team Faculty Gigi MacAllister Amy Wheeler</p>	<p><b>Staff shares/walkthroughs Staff survey</b></p> <p>Staff Satisfaction Survey indicated 100% of respondents rated PES as quite positive or extremely positive</p> <p>Top 3 factors that influence satisfaction: colleagues, culture and leadership</p>

## **PES School Goals 2019-2020**

**School: Pownal Elementary School**

### Team Members: PES staff

**District Goal: Focus on Student Achievement through Improved Student-Centered Teaching and Learning**

Goals	Strategies and Action Steps	Responsibility	Evidence of Effectiveness
<p><b>Strategic Goal 1: All RSU 5 students experience a joyful learning climate that is safe, nurturing, and fosters curiosity.</b></p> <p>PES Goal 1: Implement year 1 of 3 year shift to <i>Multi tiered System of Support</i> (Whole school, data-driven, prevention-based framework for improving learning outcomes for EVERY student through a layered continuum of evidence-based practices and systems).</p>	<p><b>Tier 1: Implement and refine Responsive Classroom practices</b></p> <ul style="list-style-type: none"> <li>● Conduct a staff book study using <u>Teaching Self-Discipline</u></li> <li>● Dedicate one staff meeting a month to Responsive Classroom implementation and learning</li> <li>● Staff walkthroughs focused on demonstrating reminding/redirecting language</li> </ul> <p><b>Tier 2: Implement RTI B</b></p> <ul style="list-style-type: none"> <li>● Establishment of RTI B screening/progress monitoring tool</li> <li>● Implement SMARTS curriculum</li> <li>● Increase staff awareness of trauma sensitive practices</li> </ul>	<p>Lisa Demick, PES Leadership Team</p> <p>Hilary Massicotte, Trevor Donoghue</p> <p>Nancy Rochat, Cathryn Bigley</p>	<p>100% of classroom teachers and specialists will be trained in Responsive Classroom practices.</p> <p>80% of staff will see an increase in Responsive Classroom self-assessment score by one level.</p> <p>Increase academic achievement in at least one content area for RTI B SMARTS curriculum group.</p>

<p><b>Strategic Goal #2 All RSU 5 students regularly engage in meaningful student centered learning.</b></p> <p>Increase percentage of K-3 students meeting reading progress as demonstrated by a 10% increase in the percentage of students meeting their growth targets in reading.</p>	<ul style="list-style-type: none"> <li>• Establish DCS/PES common staff meeting time to create collegial support for responsive planning</li> <li>• Restructure PLCs to include resource room and RTI teachers for monthly progress monitoring review/action steps</li> <li>• Implement TC Phonics Units of Study in grade 1 and continue phonics implementation in prekindergarten and kindergarten with a focus on differentiation</li> <li>• Progress monitor monthly student growth</li> <li>• Attend Teachers' College Leadership Institute/ share practices upon return</li> <li>• K-5 text band study</li> </ul>	<p>Lisa Demick, Will Pidden, Kelli Rogers</p> <p>PES Leadership Team</p> <p>Lisa Demick, Gigi MacAllister, classroom teachers, Hilary Massicotte, Sara Martin</p>	<p>Satisfaction survey comments will reflect more responsive planning time.</p> <p>Increase K-3 students who meet their Fountas &amp; Pinnell reading targets from 42% to 52%.</p>
<p>Increase percentage of 4th and 5th grade students meeting their NWEA growth targets in math from 44% to 54%.</p>	<ul style="list-style-type: none"> <li>• Participate in University of Chicago Lab Classrooms</li> <li>• Use coaching cycle to identify strategies for small group instruction</li> <li>• Increase use of math vocabulary unique to NWEA</li> <li>• Coordinate IEP goals with grade level targets to accelerate progress</li> </ul>	<p>Lisa Demick, Tayla Edlund, Tess Hoffmann, Jen Winkler, Chelsea Cekutis, Hilary Massicotte</p>	<p>Student centered coaching plans</p> <p>NWEA growth results</p>



Item #9.B.

**RSU 5 Strategic Goal 4: RSU 5 has well developed and refined finance, human resources, facilities, transportation and food service systems to support the learning of all students.**

Department Goal	Rationale & Action Steps	Timeline	Evidence of Effectiveness
<b>Strategic Goal 4.1: Ensure that all staff and students have quality facilities to meet their needs.</b>	<p><i>Review and update the 20 year capital plan ensuring that all qualifying items have been listed and an accurate life cycle is listed for each item</i></p> <p><b>Goal 1: Update 5 and 20 year capital plans.</b></p>	December 2019 and ongoing 2019-20	Updated written capital plans posted on RSU 5 web page

1

**RSU 5 Strategic Goal 4: RSU 5 has well developed and refined finance, human resources, facilities, transportation and food service systems to support the learning of all students.**

Department Goal	Rationale & Action Steps	Timeline	Evidence of Effectiveness
<b>Strategic Goal 4.4: Provide all students transportation that supports their participation in curricular and extra-curricular programs.</b>	<p><i>Review all bus runs to ensure that buses are used to their full potential covering all areas and limiting walking distances</i></p> <p><b>Goal 2: Explore options to provide transportation for all curricular and extracurricular programs Develop a plan to purchase transportation equipment</b></p>	December 2019	<p>Written documentation of adequacy of existing bus runs and options for considered for changing, added or improved bus services</p> <p>Written recommendations to superintendent</p>

2

2019-2020

# CAPITAL BUDGET PROJECTS

3

## Capital 2019-2020

<u>2019-2020)</u>	2019-2020	
Item 1	Bus (2) 77 passenger (funded through retired bus debt)	\$0
Item 2	Durham heat pump replacement (3)	\$180,000
Item 3	Mast Landing elevator upgrade	\$35,000
Item 4	Pownal bathroom upgrade main hall	\$20,000
Item 5	Pownal septic tank	\$22,000
Item 6	High school convert boiler 1 to gas	\$64,000
Item 7	Central office phone repair	\$14,000
Item 8	High school shades	\$40,000
Item 9	Morse Street hot plates & rolling door	\$15,000
Item 10	Capital Reserves	\$10,000
		\$400,000

4

## REPLACE SCHOOL BUSES



5

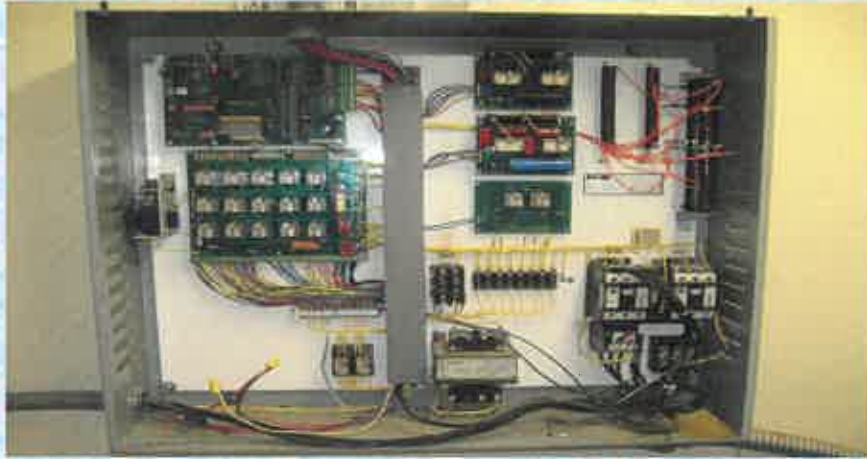
## Three Water Source Heat Pumps



6



## MAST LANDING ELEVATOR UPGRADE



7

## POWNAL BATHROOMS UPGRADE



8

## POWNAL BATHROOMS UPGRADE



9

## POWNAL SEPTIC TANK REPLACEMENT



10



## HIGH SCHOOL CONVERT BOILER ONE TO NATURAL GAS (DUAL FUEL)



11

## HIGH SCHOOL CONVERT BOILER ONE TO DUAL FUEL

- This boiler will still maintain dual fuel capabilities
- Provides redundancy without the need to purchase heating oil

12

## CENTRAL OFFICE PHONE REPLACEMENT



13

## HIGH SCHOOL SHADES



14



## Morse Street Hot Plate and Rolling Door



15

## OTHER PROJECTS (OPERATING BUDGET) MIDDLE SCHOOL OFFICE



16



## Middle School Wall Investigation



17

## OTHER PROJECTS (OPERATING BUDGET) MAST LANDING FRONT ENTRY



18

## 2020-2021 Capital Budget

<u>2020-2021</u>	<u>2020-2021</u>	
Item 1	Bus (4) 77 passenger (funded through retired bus debt)	0.00
Item 2	Pownal roof over office	35,000.00
Item 3	Durham heat pump replacement (3)	180,000.00
Item 4	High school repair tennis courts	25,000.00
Item 5	Pownal windows	130,000.00
Item 6	Central office windows business office	10,000.00
Item 7	Pownal split system in kitchen (AC)	15,000.00
Item 8	Capital Reserves	12,000.00
		400,000.00

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## POWNAL ROOF OVER OFFICE



20



## DURHAM HEAT PUMPS (3)



21

## High School Tennis Court Repairs



22

## POWNAL WINDOWS



23

## BUSINESS OFFICE WINDOWS 17 West Street



24



## POWNAL KITCHEN VENTILATE KITCHEN OFFICE



25

## 2021-2022 CAPITAL PROJECTS

2021-2022	2021-2022	
Item 1	Bus (2) 77 passenger (funded through retired bus debt)	0.00
Item 2	Mast Landing re-roof entire building	395,000.00
Item 3	Capital Reserves	5,000.00
		400,000.00

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## Proposed Capital 2022-2023

2022-2023	2022-2023	
Item 1	Bus (2) 77 passenger (funded through retired bus debt)	0.00
Item 2	High school elevator upgrade	65,000.00
Item 3	Pownal steamer	7,000.00
Item 4	High school auditorium carpet	15,000.00
Item 5	Maintenance truck (or van)	35,000.00
Item 6	Mast Landing steam kettle	30,000.00
Item 7	Morse Street elevator upgrade	65,000.00
Item 8	Mast Landing exterior doors	50,000.00
Item 9	Middle school replace siding on additions	60,000.00
Item 10	Durham heat pump	60,000.00
Item 11	Capital Reserves	13,000.00
		400,000.00

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## Proposed Capital Budget 2023-2024

2023-2024 (FY 24)	2023-2024	
Item 1	Bus (1) 84 passenger (funded through retired debt)	0.00
Item 2	High school reside portable building	10,000.00
Item 3	High school split system A/C in fitness area	38,000.00
Item 4	Durham School field Irrigation	20,000.00
Item 5	High school auditorium carpet	25,000.00
Item 6	Morse Street back path to bus circle	30,000.00
Item 7	Pownal phone system	30,000.00
Item 8	Morse Street phone system	35,000.00
Item 9	Maintenance mower	25,000.00
Item 10	Mast Landing phone system	60,000.00
Item 11	Morse Street pave playground	25,000.00
Item 12	Pownal restroom remodel gym area	25,000.00
Item 13	Central office carpet business office	12,000.00
Item 14	Middle school windows rear of school	45,000.00
Item 15	Capital Reserves	20,000.00
		400,000.00

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## Proposed Capital Budget 2024-2025

2024-2025 (FY25)		2024-2025
Item 1	Bus (2) 77 passenger (funded through retired bus debt)	0.00
Item 2	Middle school motorize bleachers	35,000.00
Item 3	Pownal security system upgrade	10,000.00
Item 4	Morse Street fire alarm upgrade	15,000.00
Item 5	Morse Street front door replacement	25,000.00
Item 6	Morse Street heat controls	45,000.00
Item 7	Pownal heating control upgrade	24,000.00
Item 8	Durham replace clock system	10,000.00
Item 9	Middle school increase parking	75,000.00
Item 10	Durham parking lot repairs	20,000.00
Item 11	Middle school and Mast Landing key card entry	130,000.00
Item 12	Capital Reserves	11,000.00
		400,000.00

Item # 9.C.

RSU #5	General Budget Report	9/30/2019			2019-2020			
Article #	Description	2019-2020 Budget	Transfers	Revised Budget	Expenses YTD	Encumb YTD	Balances YTD	% Remaining
Article 1	Support Staff	\$ 3,567,564.00	\$ -	\$ 3,567,564.00	\$ 544,467.90	\$ 35,209.56	\$ 2,987,886.54	83.75%
Article 2	School Administration	\$ 1,617,920.00	\$ -	\$ 1,617,920.00	\$ 333,266.62	\$ 5,326.00	\$ 1,279,327.38	79.07%
Article 3	Operation of Plant	\$ 4,819,999.00	\$ -	\$ 4,819,999.00	\$ 1,755,665.92	\$ 663,713.03	\$ 2,400,620.05	49.81%
Article 4	Voc. E. Assessment	\$ 99,419.00	\$ -	\$ 99,419.00	\$ 24,854.70	\$ 74,564.15	\$ 0.15	0.00%
Article 5	School Nutrition/Crossing Guard	\$ 269,645.00	\$ -	\$ 269,645.00	\$ 67,061.25	\$ 201,183.75	\$ 1,400.00	0.52%
Article 6	Instruction K - 12	\$ 14,218,224.00	\$ -	\$ 14,218,224.00	\$ 1,324,601.13	\$ 78,485.34	\$ 12,815,137.53	90.13%
Article 7	Co-Curr. & Athletics	\$ 829,237.00	\$ -	\$ 829,237.00	\$ 104,306.80	\$ 9,751.02	\$ 715,179.18	86.25%
Article 8	District Administration	\$ 950,098.00	\$ -	\$ 950,098.00	\$ 206,181.86	\$ (9,714.38)	\$ 753,630.52	79.32%
Article 9	Transportation Services	\$ 1,533,555.00	\$ -	\$ 1,533,555.00	\$ 404,214.92	\$ 299,326.89	\$ 830,013.19	54.12%
Article 10	Debt Services	\$ 1,581,756.00	\$ -	\$ 1,581,756.00	\$ 132,974.60	\$ -	\$ 1,448,781.40	91.59%
Article 11	Special Education Services	\$ 4,592,878.00	\$ -	\$ 4,592,878.00	\$ 348,551.15	\$ (4,755.96)	\$ 4,249,082.81	92.51%
	<b>Totals</b>	<b>\$ 34,080,295.00</b>	<b>\$ -</b>	<b>\$ 34,080,295.00</b>	<b>\$ 5,246,146.85</b>	<b>\$ 1,353,089.40</b>	<b>\$ 27,481,058.75</b>	<b>80.64%</b>

10/23/2019





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**Finance Subcommittee Report**

Date: October 11, 2019

Committee: Finance Committee

Chair: Kate Brown

In attendance: Kate Brown, Michelle Ritcheson, Jeremy Clough, Michelle Lickteig

Guests:

Meeting Date: October 9, 2019

**Agenda Items and Discussion:**

**Next Steps on Cost Sharing:**

The Committee continued to work on the presentation slides of the cost sharing formula recommendation. They reviewed the slides to make sure all items were well explained and consistent. Determinations were made about handouts, which Michelle R will prepare. The committee also reviewed the presentation of the current cost sharing formula that was to be presented that night.

The Committee decided to add two more meetings. One will be October 15<sup>th</sup> at Central Office from 4-5p. The second will be October 23<sup>rd</sup> at Pownal Elementary from 5-6p.

**Next Meeting:**

October 15, 2019 from 4-5p at Central Office.

Submitted by: Michelle Lickteig, Director of Finance



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### **Finance Subcommittee Report**

**Date:** October 16, 2019

**Committee:** Finance Committee

**Chair:** Kate Brown

**In attendance:** Kate Brown, Michelle Ritcheson, Jeremy Clough, Michelle Lickteig (came in late)

**Guests:**

**Meeting Date:** October 15, 2019

#### **Agenda Items and Discussion:**

##### **Next Steps on Cost Sharing:**

The Committee reviewed and modified handouts for the presentation from Michelle R. The committee went through the slides of the presentation and made sure they contained all the information necessary. Then they went through the slides again to make sure they had the talking points of each slide. The next meeting will focus on the talking points of the presentation to be given that night.

##### **Next Meeting:**

October 23, 2019 from 5p at Pownal Elementary School.

**Submitted by:** Michelle Lickteig, Director of Finance

Regional School Unit No. 5

17 West St, Freeport, ME 04032 Telephone: 865-0928x25 E-mail: [lickteigm@rsu5.org](mailto:lickteigm@rsu5.org)



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Item # 10.C.

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### **Strategic Communications Subcommittee Report**

**Committee:** Strategic Communications

**Meeting date:** October 11, 2019

**Chair:** Candy deCsipkes

**Committee Members in attendance:** Lindsey Furtney, Becky Foley, Valy Steverlynck, Candy deCsipkes

**Committee Members absent:** Lindsay Sterling

#### **Agenda Items and Discussion:**

1. The Committee spent time reviewing the executive summary of the Workplace Satisfaction Survey, and spent time finalizing the document.
2. The executive summary will be discussed at an upcoming Board meeting.

The next meeting will be held on January 10, 2020 at 8:30 a.m.

**Regional School Unit No. 8**

**17 West St., Freeport, ME 04032**

**Telephone: 866-0928x6**

**E-mail: [mcmanusg@rsu8.org](mailto:mcmanusg@rsu8.org)**



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**Policy Subcommittee Report**

**Committee:** Policy

**Meeting date:** October 11, 2019

**Chair:** Candy deCsipkes

**Committee Members in attendance:** Candy deCsipkes, Maddy Vertenten, Kate Brown, Cynthia Alexander

**Guests:** Bonnie Violette

**Review/Revise Policies:**

*The following policies were reviewed with no changes recommended.*

KI Visitors to School

KLG Relations with Law Enforcement Authorities

KLG-R Relations with Law Enforcement Authorities Admin. Procedures

*The following policy was revised and will be brought to the Board for 1st read on October 23, 2019.*

IMGA Service Animals in School

*The following policy was revised and will be brought to the Board for a final read on October 23, 2019.  
We will be reviewing only Sections H and I.*

JIC System-Wide Student Code of Conduct

*The following policy was revised and will be brought back to the Policy Committee on November 1, 2019 for further revision.*

BBA Board of Directors Powers and Responsibilities

The next meeting will be held on November 1, 2019 at 8:30 a.m.

Submitted by: Cynthia Alexander



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Item # 11.A & B.

**TO:** Kathryn Brown, Jeremy Clough, Candace deCsipkes, Lindsey Furtney, Jennifer Galletta, Elisabeth Munsen, Maura Pillsbury, Michelle Ritcheson, Lindsay Sterling, Valeria Steverlynck, Madelyn Vertenten, Rhea Fitzpatrick, Liam Hornschild-Bear

**CC:** Julie Nickerson, Lisa Demick, Kelli Rogers, Ray Grogan, Erin Dow, Dennis Ouellette, Will Pidden, Craig Sickels, Jim Grant, Peter Wagner, Jen Gulko, Bonnie Violette, Emily Grimm, Conor Walsh, Charlie Mellon, Michelle Lickteig, Anne-Marie Spizzuoco, Beth Daniels, Deanna Coro, Pauline Gillis, Shawn McBean, Dorothy Curtis, Eugenia O'Brien, Hank Ogilby, Lisa Blier, Linda Pritchard, Jennifer Winkler, Nancy Drolet, Nancy Dyer, Jessica Sturges, Nancy Decker, Alicia DeRoche

**FROM:** Cynthia Alexander, Assistant Superintendent of Curriculum, Instruction, and Assessment

**DATE:** October 15, 2019

**RE:** Review/Update of Policies

At the October 23, 2019 Board of Directors Meeting, the following policies will be on the agenda for 1<sup>st</sup> Read, 2<sup>nd</sup> Read, and Review. The policies are attached.

1<sup>st</sup> Read Policies

1. IMGA – Service Animals in Schools

2<sup>nd</sup> Read Policies

1. ADA – School System Goals and Objectives
2. BCA – Board of Directors Member Code of Ethics
3. JIC – System-Wide Student Code of Conduct
4. JJIF – Student Concussions and Other Head Injuries
5. JJIF-E – RSU5 Concussion Information Sheet

The following policies were reviewed with no recommended revisions and require no Board action.

1. KI – Visitors to the Schools
2. KLG – Relations with Law Enforcement Authorities
3. KLG-R – Relations with Law Enforcement Authorities Administrative Procedure

## **SERVICE ANIMALS IN SCHOOLS**

~~The Board recognizes that service animals may be used to provide assistance to some persons with disabilities. This policy governs the presence of service animals in the schools, on school property, including school buses, and at school activities.~~

### **DEFINITION**

~~As applied to schools, federal and Maine law define a “service animal” as a dog that is individually trained to do work or perform tasks for the benefit of an individual with a disability, including a physical, sensory, psychiatric, intellectual or other mental disability. Other species of animals, whether wild or domestic, trained or untrained, are not service animals for the purpose of this definition.~~

~~The work or tasks performed by a service animal must be directly related to the individual’s disability. Examples of such work or tasks include, but are not limited to, assisting an individual who is totally or partially blind with navigation and other tasks, alerting an individual who is deaf or hard of hearing to the presence of people or sounds, providing nonviolent protection or rescue work, pulling a wheelchair, assisting an individual during a seizure, alerting an individual to the presence of allergens, retrieving items such as medicine or a telephone, providing physical support and assistance with balance and stability to an individual with a mobility disability and helping a person with a psychiatric or neurological disability by preventing or interrupting impulsive or destructive behaviors.~~

~~The crime deterrent effects of an animal’s presence and the provision of emotional support, well-being, comfort or companionship do not constitute work or tasks for the purposes of this definition.~~

### **USE OF SERVICE ANIMALS IN SCHOOLS**

~~Use of a service animal by a qualified student with a disability will be allowed in school when it is determined that the student’s disability requires such use in order to have equal access to the instructional program, school services and/or school activities.~~

~~Use of a service animal by a qualified employee with a disability will be allowed when such use is necessary to enable the employee to perform the essential functions of his/her job or to enjoy benefits of employment comparable to those of similarly situated non-disabled employees.~~

~~The parent/guardian of a student who believes the student needs to bring a service animal to school, or an employee who wishes to bring a service animal to school, must submit a written request to the building principal. The building principal, in consultation with the Section 504 Coordinator or Director of Special Services, as appropriate, and the Superintendent will determine whether or not to permit the service animal in school.~~

~~Before a service animal shall be permitted in school or on school property, the student's parent or the employee must provide:~~

- ~~\_\_\_\_\_ A. \_\_\_\_\_ A description of the function(s) the service animal is expected to perform in assisting the person with a disability;~~
- ~~\_\_\_\_\_ B. \_\_\_\_\_ Documentation of liability insurance;~~
- ~~\_\_\_\_\_ C. \_\_\_\_\_ A copy of the animal's current license and tag identifying it as a service animal (if applicable);~~
- ~~\_\_\_\_\_ D. \_\_\_\_\_ Current certification from a veterinarian that the animal is in good health;~~
- ~~\_\_\_\_\_ E. \_\_\_\_\_ Proof of current rabies vaccination;~~
- ~~\_\_\_\_\_ F. \_\_\_\_\_ Certification of the service animal's training by a recognized agency or organization and/or demonstration of training; and~~
- ~~\_\_\_\_\_ G. \_\_\_\_\_ Evidence that the student or employee can appropriately supervise, care for, and control the animal at school, or, depending upon the circumstances involved, that there is a plan for some other person other than school unit staff, to be present to care for and control the animal.~~

~~Parents or animal handlers who will be present in school for the purpose of assisting a student with his/her service animal will be required to submit to a sex offender registry and criminal background check. In addition, parents and handlers must comply with all standards of conduct that apply to school employees and volunteers.~~

~~The school unit may impose additional conditions on the presence of a service animal, depending upon the circumstances.~~

~~The building principal may remove or exclude a service animal from the school or school property if:~~

- ~~\_\_\_\_\_ A. \_\_\_\_\_ The presence of the animal poses a direct threat to the health and safety of others;~~
- ~~\_\_\_\_\_ B. \_\_\_\_\_ The animal significantly disrupts or interferes with the instruction program, school activities, or student learning;~~
- ~~\_\_\_\_\_ C. \_\_\_\_\_ The presence of the animal would require a fundamental alteration of any school program;~~
- ~~\_\_\_\_\_ D. \_\_\_\_\_ The student, employee or handler is unable to fully control the animal;~~
- ~~\_\_\_\_\_ E. \_\_\_\_\_ The student, employee or handler fails to appropriately care for the animal, including feeding, exercising, taking outside for performance of excretory functions, and cleaning up;~~

- ~~\_\_\_\_\_ F. The parents or employee fails to provide the required documentation; and~~
- ~~\_\_\_\_\_ G. The animal fails to consistently perform the function(s)/service(s) for which it has been trained and brought to school.~~

~~A parent or employee whose service animal has been removed or excluded may appeal the decision to the Superintendent. If dissatisfied with the Superintendent's decision, the parent or employee may appeal to the Board.~~

#### ~~SERVICE ANIMALS AT SCHOOL SPONSORED EVENTS~~

~~Individuals with disabilities may be accompanied by their service animals to events or activities open to the public that are held in schools or on school property. The use of a service animal may not be conditioned on the payment of a fee or security deposit, but the individual is liable for any damage done to the premises or facilities by such an animal.~~

~~The building administrator may revoke or exclude the service animal only if the animal poses a direct threat to the health and safety of others, the use of the animal would result in substantial physical damage to the property of others, or would substantially interfere with the reasonable enjoyment of the event or activity by others.~~

~~Legal Reference: \_\_\_\_\_ 42 USC § 12101 et seq.  
\_\_\_\_\_ 36 CFR § 104, 302  
\_\_\_\_\_ 5 MRSA §§ 4553, 4592  
\_\_\_\_\_ Me. Human Rights Commission Rule Chapter 7~~

~~Cross References \_\_\_\_\_ AC Nondiscrimination, Equal Opportunity, and Affirmative Action  
\_\_\_\_\_ IMG Animals in Schools~~

~~Adopted: December 14, 2011  
Reviewed: December 12, 2012~~



## **SERVICE ANIMALS IN SCHOOLS**

The Board recognizes that service animals may be used to provide assistance to some persons with disabilities. This policy governs the presence of service animals in the schools, on school property, including school buses, and at school activities.

### **DEFINITION**

As applied to schools, federal and Maine laws define a “service animal” as a dog that is individually trained to do work or perform tasks for the benefit of an individual with a disability, including a physical, sensory, psychiatric, intellectual or other mental disability. Other species of animals, whether wild or domestic, trained or untrained, are not service animals for the purpose of this definition.

The work or tasks performed by a service animal must be directly related to the individual’s disability. Examples of such work or tasks include, but are not limited to, assisting an individual who is totally or partially blind with navigation and other tasks, alerting an individual who is deaf or hard of hearing to the presence of people or sounds, providing nonviolent protection or rescue work, pulling a wheelchair, assisting an individual during a seizure, alerting an individual to the presence of allergens, retrieving items such as medicine or a telephone, providing physical support and assistance with balance and stability to an individual with a mobility disability and helping a person with a psychiatric or neurological disability by preventing or interrupting impulsive or destructive behaviors.

The crime deterrent effects of an animal’s presence and the provision of emotional support, well-being, comfort or companionship do not constitute work or tasks for the purposes of this definition.

### **USE OF SERVICE ANIMALS IN SCHOOLS**

Use of a service animal by a qualified student with a disability will be allowed in school when it is determined that the student’s disability requires such use in order to have equal access to the instructional program, school services and/or school activities.

Use of a service animal by a qualified employee with a disability will be allowed when such use is necessary to enable the employee to perform the essential functions of his/her job or to enjoy benefits of employment comparable to those of similarly situated non-disabled employees.

The parent/guardian of a student who believes the student needs to bring a service animal to school, or an employee who wishes to bring a service animal to school, must submit a written request to the building principal. The building principal, in consultation with the Section 504 Coordinator or Director of Instructional Support, as appropriate, and the Superintendent will determine whether or not to permit the service animal in school.

Parents or animal handlers who will be present in school for the purpose of assisting a student with his/her service animal will be required to submit to a sex offender registry and criminal background check. In addition, parents and handlers must comply with all standards of conduct that apply to school employees and volunteers.

The school unit may impose additional conditions on the presence of a service animal, depending upon the circumstances.

The building principal may remove or exclude a service animal from the school or school property if the presence of the animal poses a direct threat to the health and safety of others or the student, employee or handler is unable to fully control the animal; or the animal fails to consistently perform the function(s)/service(s) for which it has been trained and brought to school.

A parent or employee whose service animal has been removed or excluded may appeal the decision to the Superintendent. If dissatisfied with the Superintendent's decision, the parent or employee may appeal to the Board.

#### SERVICE ANIMALS AT SCHOOL-SPONSORED EVENTS

Individuals with disabilities may be accompanied by their service animals to events or activities open to the public that are held in schools or on school property. The use of a service animal may not be conditioned on the payment of a fee or security deposit, but the individual is liable for any damage done to the premises or facilities by such an animal.

The building principal may revoke or exclude the service animal only if the animal poses a direct threat to the health and safety of others, the use of the animal would result in substantial physical damage to the property of others, or would substantially interfere with the reasonable enjoyment of the event or activity by others.

Legal Reference: 42 USC § 12101 et seq.  
36 CFR § 104.302  
5 MRSA §§ 4553, 4592  
Me. Human Rights Commission Rule Chapter 7

Cross References     AC - Nondiscrimination, Equal Opportunity, and Affirmative Action  
IMG - Animals in Schools

Adopted:     December 14, 2011

Reviewed:   December 12, 2012

Revised:

## **SCHOOL SYSTEM GOALS AND OBJECTIVES**

The ~~RSU~~ RSU No. 5 Board of Directors recognizes its responsibility to develop a strategic vision and set goals for the efficient operation of the school unit. In discharging this responsibility, the Board of Directors will strive to ensure that the resources of the unit are directed toward meeting the educational needs of each eligible student.

The Board of Directors will develop annual goals based on input solicited from a variety of sources. These goals will be shared with the community, the staff, and the students. The administration shall develop appropriate objectives designed to achieve the stated priorities goals.

The Board of Directors will regularly evaluate progress toward meeting the goals and will adopt appropriate policies designed to facilitate their accomplishment.

Legal Reference: TITLE 20-A MRSA SEC. 4511.3, A

Adopted: May 27, 2009  
Reviewed: December 8, 2010  
Reviewed: November 20, 2013  
Revised: \_\_\_\_\_

## **BOARD OF DIRECTORS MEMBER CODE OF ETHICS**

Having accepted the challenge of service on ~~this the Board, of Directors, I~~ members accept the principles set forth in the following code of ethics to guide ~~me them~~ in helping to provide free public education to all the children of ~~my school unit within the State of Maine~~ RSU No. 5.

### Each Board member shall:

- A. ~~I will~~ view service on the Board of Directors as an opportunity to serve my community, state, and nation because I believe public education is the best means to promote the welfare of our people and to preserve our democratic way of life.
- B. ~~I will~~ at all times think of children first and base my decisions on how they will affect children, their education, and their training.
- C. ~~I will~~ make no disparaging remarks, in or out of the Board of Directors meetings, about other members of the Board or their opinions.
- D. ~~I will~~ remember at all times that as an individual I have no legal authority outside the meetings of the Board of Directors, and that I will conduct my relationship with the school staff, the local citizenry, and all media of communications on the basis of this fact.
- E. ~~I will~~ recognize that my responsibility is not to operate the schools but to see that they are well operated.
- F. ~~I will~~ seek to provide education for all children in the community commensurate with their needs and abilities.
- G. ~~I will~~ listen to all citizens but will refer all complaints to the proper authorities, and will discuss such complaints only at a regular meeting after failure of administrative solution.
- H. ~~I will~~ abide by a decision graciously once it has been made by the majority of the Board of Directors.
- I. ~~I will~~ not criticize employees publicly, but will make such criticism to the Superintendent for investigation and action, if necessary.
- J. ~~I will~~ make decisions openly after all facts bearing on a question have been presented and discussed.
- K. ~~I will~~ refuse to make promises as to how I will vote on a matter that should properly come before the Board of Directors as a whole.

- L. ~~I will~~ not discuss the confidential business of the Board of Directors in my home, on the street, in my office, or any location other than during a Board of Directors executive session.
- M. ~~I will~~ confine my Board of Directors action to policy making, planning, and appraisal, leaving the administration of the schools to the Superintendent.
- N. ~~I will~~ welcome and encourage cooperation and participation by teachers, administrators, and other personnel in developing policies that affect their welfare and that of the children they serve.
- O. ~~I will~~ endeavor at all times to see that schools have adequate financial support within the capabilities of the community and state, in order that every child may receive the best possible education.
- P. ~~I will~~ resist every temptation and outside pressure to use my position as a Board member to benefit myself or any individual or agency apart from the total interest of the school unit.
- Q. ~~I will~~ endeavor to attend every regular and special Board of Directors meeting recognizing that my presence means representation for my town or city. If I find that this is not possible for an extended length of time, I will give consideration to resigning from my position on the Board of Directors.
- R. ~~I will~~ recognize at all times that the Board of Directors of which I am a member is an agent of the state, and as such, I will abide by the laws of the state and the regulations formulated by the Maine Department of Education and by the State Board of Education.

The Board shall read this policy at the beginning of each school year and each member will sign the acknowledgement form. Any new members to the Board will read this policy and sign acknowledgement during Board orientation.

Adopted: October 28, 2009  
Reviewed: January 26, 2011  
Reviewed: December 18, 2013  
Revised: \_\_\_\_\_

## SYSTEM-WIDE STUDENT CODE OF CONDUCT

Ethical and responsible student behavior is an essential part of the educational mission of our schools. To that end, the Board has developed this System-Wide Code of Conduct with input from school staff, students, parents and the community. The Code defines our expectations for student behavior and provides the framework for a safe, orderly and respectful learning environment.

### **~~Article 1~~— A. Standards for Ethical and Responsible Behavior**

The Code of Conduct is intended to support and encourage students to meet the following state-wide standards for ethical and responsible behavior:

- Respect
- Honesty
- Compassion
- Fairness
- Responsibility
- Courage

### **~~Article 2~~— B. Code of Conduct**

All students are expected to comply with the Code of Conduct and all related Board policies and school rules. The Code applies to students:

- on school property,
- while in attendance at school or at any school-sponsored activity, or
- at any time or place that such conduct directly interferes with the operations, discipline or ~~general welfare of the school~~ environment.

### **~~Article 3~~— C. General Behavior Expectations**

The following expectations for student behavior are fundamental to a safe, orderly and respectful environment in our schools. Each student should:

1. Be courteous to fellow students, staff and visitors.
2. Respect the rights and privileges of other students and school staff.
3. Obey all Board policies and school rules governing student conduct.
4. Follow directions from school staff.
5. Cooperate with staff in maintaining school safety, order and discipline.
6. Attend school regularly.

7. Meet school standards for grooming and dress.
8. Respect the property of others, including school property and facilities.
9. Refrain from cheating or plagiarizing the work of others.
10. Refrain from vulgarity, profanity, obscenity, lewdness, and indecency.

#### **~~Article 4—~~ D. Discipline**

Violations of the Code of Conduct may result in positive and restorative interventions and/or disciplinary action. Administrators have the discretion to tailor discipline to the facts and circumstances of the particular case. Consequences will range from a verbal warning for minor misconduct up to and including expulsion for the most serious offenses. Behavior that also violates the law may be referred to law enforcement authorities.

**See Policies:**

~~JK—Student Discipline~~  
~~JKB—Detention of Students~~  
~~JKD—Suspension of Students~~  
~~JKE—Expulsion of Students~~

#### **~~Article 5—~~ E. Expectations Related to Policy**

The following ~~lists Board adopted policies related to expectations for student behavior, is a summary of the school unit's expectations for student behavior. In many cases, the Board has adopted policies that address these expectations in greater detail.~~ Students, parents and others should refer to the policies and student handbooks for more detailed information about the expectations and consequences. ~~In case of an inconsistency between this Code of Conduct, Board policies and/or school handbooks, Board policies will prevail.~~

##### **~~A: Violence and Threats~~**

~~Students shall not engage in violent or threatening behavior. Prohibited behavior includes fighting, assault and/or battery, taking hostages, threats to commit violence against persons or property, or threats, intimidation, or harassment. Violations may result in disciplinary action up to and including expulsion.~~

**See Policies:**

~~HCLA—Weapons, Violence and School Safety~~  
~~HCK—Bullying~~  
~~EBCC—Bomb Threats~~

##### **~~B: Weapons~~**



~~Students shall not possess or use weapons of any kind (examples include but are not limited to firearms, explosives and knives). Students also shall not use any object, although not necessarily designed to be a weapon, to inflict bodily harm and/or to threaten, intimidate, coerce or harass another person (examples include but are not limited to bats, lighters, tools and toy weapons). Firearms violations will result in expulsion in accordance with state and federal statutes; other weapons violations may result in disciplinary action up to and including expulsion.~~

~~See Policies:~~

~~JICA – Weapons, Violence and School Safety~~

~~JCK – Bullying~~

#### **C. Hazing**

~~Hazing is prohibited. Maine law defines injurious hazing as “any action or situation, including harassing behavior that recklessly or intentionally endangers the mental or physical health of any school personnel or a student enrolled in a public school.” No student shall plan, encourage or engage in such activities in connection with any school program or activity, including extracurricular, co-curricular and athletic activities. Students who engage in hazing activities are subject to suspension, expulsion and/or other appropriate disciplinary measures.~~

~~See Policy – ACAD – Hazing~~

#### **D. Discrimination and Harassment/Sexual Harassment**

~~Students should not discriminate against other students on the basis of race, color, sex, religion, ancestry, national origin or disability. Nor should students harass one another on the basis of race, color, sex, sexual orientation, religion, ancestry, or national origin or disability. Sexual harassment is also prohibited. Harassment is grounds for disciplinary action up to and including expulsion.~~

~~See Policies:~~

~~AC – Nondiscrimination~~

~~ACAA – Harassment and Sexual Harassment of Students~~

#### **E. Bullying**

~~Students shall not engage in bullying behavior, including unwanted physical contact, acts or communications of any kind that: 1) damage a student’s property; place a student in reasonable fear of physical harm and/or damage his/her property; and/or disrupt the instructional program or the orderly operation of the school; and/or 2) is so severe that it creates a hostile educational environment for the student who is bullied.~~

~~Violations may result in disciplinary action up to and including expulsion from school.~~

~~See Policy — JICIA — Weapons, Violence and School Safety~~

**F: Drug and Alcohol Use**

~~Students shall not distribute, possess, use or be under the influence of any alcoholic beverage, drug, look-alike substance or other prohibited materials and/or substances as described in Board policy. Violations may result in disciplinary action up to and including expulsion from school.~~

~~See Policy — JICH — Drug and Alcohol Use by Students~~

**G: Tobacco Use and Vaping**

~~Students shall not smoke, use, possess, sell or distribute any tobacco products. This prohibition also applies to e-cigarettes and products and paraphilia associated with “vaping.” Violations of this policy may result in disciplinary action up to and including suspension from school.~~

~~See Policy — ADC — Tobacco Use and Possession~~

**H: Conduct on School Buses**

~~Students must comply with all Board policies and school rules while on school buses. Students who violate these policies and rules on a school bus may have their riding privileges suspended or revoked, and may also be subject to additional disciplinary action, up to and including expulsion, depending upon their particular violation.~~

~~See Policy — JICC — Student Conduct on School Buses~~

**I: Computer Technology/Internet Use**

~~Students may use school computers technology devices, networks and Internet services only for educational purposes and other purposes authorized by the school unit. Students shall comply with all policies and rules governing acceptable use. Unacceptable use may result in use restrictions suspension or cancellation of computer technology privileges as well as additional disciplinary and/or legal action.~~

~~See Policy — JPNDB — Student Computer and Internet Use~~

Expectations	Related Policies
Violence and Threats	JICIA Weapons, Violence and School Safety
	JICK Bullying
	EBCC Bomb Threats
Weapons	JICIA Weapons, Violence and School Safety
	JICK Bullying
Hazing	ACAD Hazing
Discrimination and Harassment/Sexual Harassment	AC Non-Discrimination/Equal Opportunity and Affirmative Action
	ACAA Harassment and Sexual Harassment of Students
Bullying	JICIA Weapons, Violence and School Safety
	JICK Bullying
Drug and Alcohol Use	JICH Drug and Alcohol Use by Students
Tobacco Use and Vaping	ADC Tobacco Use and Possession
Conduct on School Buses	JICC Student Conduct on School Buses
Technology/Internet Use	IJNDB Student Technology, Internet Use, and Internet Safety

#### **F. Athletic/Co-Curricular Activities**

Students must follow all RSU No. 5 Board policies and school rules while participating in athletics and co-curricular activities. Students who violate policies and rules may be subject to suspension or removal from the team/activity as well as additional disciplinary action under applicable Board policies and/or school rules.

#### **Article 6— G. Removal of Disruptive/Violent/Threatening Students**

1. Students who are disruptive, violent or threatening death or bodily harm to others may be removed from classrooms, school buses, or other school property when necessary to maintain order and safety. The staff member who orders the student removed should arrange to have the student escorted to the office or other designated location.
2. If a student does not comply with a staff member's order to leave, the staff member will contact an administrator, or, if not available, another suitable trained staff member person, who shall respond promptly.
3. Staff members should not use physical force or restraint, except to the minimum extent necessary to protect any person from imminent physical harm. Staff members are not required to take action that puts them at risk of serious injury.
4. The responding administrator will take appropriate action. If the student fails to obey verbal directions, force or restraint may be used only to the minimum extent necessary to protect any person from imminent physical harm or to quell a disturbance. Whenever practicable, law enforcement should be called to restrain or physically remove the non-compliant student. The administrator may invoke the school unit's crisis response plan if appropriate.

~~Sec 20-A MRSA § 4009—Protection from Liability  
Sec Comprehensive Emergency Management Plan~~

#### **Article 7— H. Special Services**

1. **Referral.** In some cases, a student may be referred for a special education evaluation. The school unit has adopted policies and procedures for determining when a student shall be referred for special services.

~~See Policies:~~

~~HIBAA—Referral/Pre-Referral Policy of Students with Disabilities  
HIBAC—Child Find~~

2. **Review of Individual Educational Plan.** For students with disabilities, the school shall schedule an IEP meeting to review the IEP of a student who has been removed from class when: a) school officials and/or the parent believes the student may present a substantial likelihood of injury to himself/herself or other; b) the class removals are sufficient to constitute a change in the student's special education program; or c) school officials or the parent/guardian believes that the student's behavior may warrant a change in educational programming.

~~See Policy—JKF—Disciplinary Removals of Students with Disabilities~~

**Article 8 – I. Referrals to Law Enforcement Authorities**

The Superintendent and administrators have the authority to seek the assistance of law enforcement authorities when there is a substantial threat to the safety of the students, staff, or schools. The Superintendent/administration may also inform law enforcement authorities when they have reason to suspect that a student or staff member may have violated a local, state or federal statute. All serious offenses, as determined by the Superintendent, must be reported to law enforcement authorities.

**See Policies:**

~~KLG – Relations with Law Enforcement Authorities, OR  
KLG A – Relations with School Resource Officers and Law  
Enforcement Authorities~~

**Article 9 – J. Dissemination of System-Wide Student Code of Conduct**

The System-Wide Student Code of Conduct shall be distributed to staff, students and parents through handbooks and/or other means selected by the Superintendent and building administrators.

**Cross Reference:** AC – Nondiscrimination  
ACAA – Harassment and Sexual Harassment of Students  
ACAD – Hazing  
ADC – Tobacco Use and Possession  
EBCC – Bomb Threats  
IHBAA – Referral/Pre-Referral Policy of Students with Disabilities  
IHBAC – Child Find  
LJNDB – Student Computer and Internet Use  
JICC – Student Conduct on School Buses  
JICH – Drug and Alcohol Use by Students  
JICIA – Weapons, Violence and School Safety  
JICK – Bullying  
JK – Student Discipline  
JKB – Detention of Students  
JKD – Suspension of Students  
JKE – Expulsion of Students  
JKF – Disciplinary Removals of Students with Disabilities  
KLG – Relations with Law Enforcement Authorities

**Legal Reference:** 20-A MRSA §§ 254 (11); 1001 (15), (15-A)

**Adopted:** March 24, 2010  
**Revised:** January 23, 2013  
**Revised:**

## **STUDENT CONCUSSIONS AND OTHER HEAD INJURIES**

The Board recognizes that concussions and other head injuries are serious and can potentially result in significant brain damage and/or death if not recognized and treated properly. This policy is intended to promote awareness of this issue as well as the safety of students participating in school-sponsored activities that may pose a risk of concussion or other head injuries. This policy also applies to all school-sponsored activities that the Superintendent determines, in consultation with school staff, pose a risk of concussion or other head injury (hereafter referred to as “any other covered activities”).

The Superintendent shall ensure that all training, protocols and forms implemented in the school unit are consistent with materials promulgated by the Maine Department of Education.

### **A. Staff Training**

All school personnel involved in school-sponsored activities shall receive training in the identification and management of concussions and other head injuries.

All identified personnel will receive refresher training whenever the Maine Department of Education recommendations, protocols and/or forms have been revised.

### **B. Student and Parent/Guardian Acknowledgment**

Students who intend to participate in school-sponsored athletics (and any other covered activities), and their parent(s)/guardian(s) are required to sign the School Department’s Concussion/Head Injury Acknowledgment Form each year. Students may not participate in athletics (and any other covered activities) until the Acknowledgment Form is returned to the school.

### **C. Removal of Students from School-Sponsored Activities, Evaluations and Medical Clearance**

Any student suspected of having sustained a concussion or other head injury in any school-sponsored activity must be immediately removed from the activity, practice or game.

A student suspected of having sustained a concussion or other head injury must receive a brain injury evaluation and written medical clearance from a licensed health care provider, ideally one trained in concussion management, and operating within the scope of practice such as an MD, DO, Physician’s Assistant or Nurse Practitioner prior to his/her being allowed to resume participation in the activity. Such return to participation ~~may~~ will be gradual and at the Discretion of the Concussion Management Team, and in all cases ~~should be~~ is based on the district’s current accepted standards of care at the discretion of the Concussion Management Team, and the health care provider’s recommendations.

**D. Academic and Disability Considerations**

Teachers and other school staff ~~should~~ must be alerted to possible cognitive and academic issues that a student who has sustained a concussion or other head injury may experience. School staff shall permit adjustments to the academic day and/or expectations, consistent with a medical recommendation from the student's health care provider.

**E. Concussion Management Team**

The Superintendent will appoint a Concussion Management Team to be responsible, under the supervision of the Superintendent, to make recommendations related to the implementation of this policy. The Concussion Management Team will include the school nurses, Athletic Director, Athletic Trainer and may include one or more principals or assistant principals, the school physician, and other school personnel or consultants as the Superintendent deems appropriate.

The team shall oversee and implement this policy and related protocols for concussions and other head injuries based on the generally accepted standards of care. This team will identify the school personnel who shall be trained in concussion signs and symptoms and the school activities covered by this policy.

The policy and/or related protocols should be reviewed when generally accepted protocols change.

Legal References: Public Law Chapter 688 (2012)  
20-A M.R.S.A. §§ 254(17); 1001(19)

Adopted: November 28, 2012

Revised: June 15, 2016

Revised: \_\_\_\_\_

**Parents and student-athletes: You must turn in a signed form prior to the start of practice. This information sheet is available on the athletic webpage and copies are available at each school.**

## RSU NO. 5 CONCUSSION INFORMATION SHEET

A concussion is a brain injury and all brain injuries are serious. They are caused by a bump, blow or jolt to the head, or by a blow to another part of the body with the force transmitted to the head. They can range from mild to severe and can disrupt the way the brain normally works. **All concussions are potentially serious and may result in complications including prolonged brain damage and death if not recognized and managed properly.** In other words, even a “ding” or a bump on the head can be serious. You can’t see a concussion and most sports concussions occur without loss of consciousness. Signs and symptoms of concussion may show up right after the injury or can take hours or days to fully appear. If your student-athlete reports any symptoms of concussion, or if you notice the symptoms or signs of concussion yourself, seek medical attention right away.

### **Symptoms may include one or more of the following:**

- |  |   |
|--|---|
| • Headaches  | ▪ “Don’t feel right”  |
| • “Pressure in head”                                       | ▪ Fatigue or low energy                                       |
| • Nausea or vomiting                                       | ▪ Behavioral/Emotional/Social changes                         |
| • Neck pain  | ▪ Nervousness or anxiety                                      |
| • Balance problems or dizziness                            | ▪ Irritability  |
| • Blurred, double, or <del>fussy</del> <u>fuzzy</u> vision | ▪ More emotional  |
| • Sensitivity to light or noise                            | ▪ Confusion   |
| • Feeling sluggish or slowed down                          | ▪ Concentration or memory problems<br>(forgetting game plays) |
| • Feeling foggy or groggy                                  | ▪ Repeating the same question/comment                         |
| • Drowsiness   | ▪ Amnesia   |
| • Change in sleep patterns                                 |   |

### **Signs observed by teammates, parents or coaches include:**

- |   |   |
|---|---|
| • Appears dazed                                 | ▪ Shows behavior or personality changes         |
| • Vacant facial expression                      | ▪ Can’t recall events prior to hit              |
| • Confused about assignment                     | ▪ Can’t recall events after hit                 |
| • Forgets plays                                 | ▪ Seizures or convulsions                       |
| • Is unsure of game, score, or opponent         | ▪ Any change in typical behavior or personality |
| • Moves clumsily or displays<br>in coordination | ▪ Loses consciousness                           |
| • Answers questions slowly                      | ▪ Slurred speech                                |

This document is adapted from the CDC and the 3<sup>rd</sup> International Conference on Concussion in Sport Consensus Statement (2009)



**RSU NO. 5 CONCUSSION INFORMATION SHEET****What can happen if my child keeps on playing with a concussion or returns too soon?**

Continuing to play with the signs and symptoms of concussion leaves the young athlete especially vulnerable to greater injury. There is an increased risk of significant damage from a concussion for a period of time after that concussion occurs, particularly if the athlete suffers another concussion before completely recovering from the first one. This can lead to prolonged recovery, or even to severe brain swelling (second impact syndrome) with devastating and even fatal consequences. It is well known that adolescent or teenage athletes will often under report symptoms of injuries, and concussions are no different. As a result, education of administrators, coaches, parents and students is the key for student-athlete's safety.

**If you think your child has suffered a concussion**

Any athlete even suspected of suffering a concussion should be removed from the game or practice immediately. No athlete may return to activity after an apparent head injury or concussion, regardless of how mild it seems or how quickly symptoms clear, without medical clearance. Close observation of the athlete should continue for several hours. RSU No. 5 requires the consistent and uniform implementation of a return to play concussion protocol as reflected in Board policy:

Any student suspected of having sustained a concussion or other head injury during a school-sponsored athletic activity including but not limited to competition, practice or scrimmage, must be removed from the activity immediately.

No student will be permitted to return to the activity or to participate in any other school-sponsored athletic activity on the day of the suspected concussion.

Any student who is suspected of having sustained a concussion or other head injury shall be prohibited from further participation in school-sponsored athletic activities until he/she has been evaluated and received written medical clearance to do so from a qualified and licensed health care provider, ideally one trained in Concussion Management. Such return to participation will be gradual, and in all cases is based on the district's current accepted standards of care.

You should also inform the athletic trainer, school nurse, and your child's coach if you think that your child may have a concussion. Remember it's better to miss one game than miss the whole season. And when in doubt, the athlete sits out.

For current and up-to-date information on concussions you can go to:

<http://www.cdc.gov/Headsup>

Student-athlete Name Printed \_\_\_\_\_

Student-athlete Signature \_\_\_\_\_

Date \_\_\_\_\_

Parent or Legal Guardian Printed \_\_\_\_\_

Parent or Legal Guardian Signature \_\_\_\_\_

Date \_\_\_\_\_

Adopted: November 28, 2012

Revised: \_\_\_\_\_

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# RSU5 Cost Sharing Method

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Presented by the RSU5 Finance Committee  
October 23, 2019

# Overview

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- Timeline
- Fact-Finding
- Finance Committee Objectives
- Breakdown/Walkthrough of Current Funding Method
- Criteria for Changing Method
- Factors Considered
- Committee Recommendation

# Cost-Sharing Method Evaluation Timeline

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**1/10/2018 - RSU5 Board instructs Finance Committee to undertake an evaluation of the current cost-sharing method.**

**3/28/2018 - RSU5 Board votes on the process for approval of any recommendation from the Finance Committee regarding changes to the current cost-sharing method. Board consensus was to approve via Board vote rather than Referendum.**

**4/2018 through 6/2018 - Finance Committee holds two meetings with Town Leadership from each member municipality to solicit input on additional factors to consider in its review of the cost-sharing method, sends follow-up letter to Town Leadership requesting letter of input on additional factors.**

# Cost-Sharing Method Evaluation Timeline

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9/18/2018 - Finance Committee grants extension and/or allows for revisions to previous letters submitted by Town Leadership from each member municipality.

10/10/2018 - Finance Committee invites Town Leadership from each member municipality to RSU5 Board meeting to present their letters of recommendations. RSU5 Board provides direction on overarching goals.

12/2018 through 3/2019 - Fact-Finding Phase.

4/2019 through 6/2019 - Deliberation on current method and potential factors.

6/12/2019 - Finance Committee unanimously votes in favor of the Recommended Cost-Sharing Method outlined in this presentation.



# Fact-Finding Phase

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- Researched school finance laws regarding minimum receivership, special education adjustment, and EPS funding.
- Reached out to Legal counsel to clarify existing language in current cost-sharing method.
- Established comfort level and common understanding of how the ED 279 report utilizes the “total cost of education” (i.e., EPS Funding Allocation), Pupil Counts, State Valuations, and Mil Expectation to determine each member municipality’s Required Local Contribution and State Subsidy.
- Reviewed RPC Finance Committee meeting notes and contacted/met with former members of the committee from each town.
- Researched the cost sharing methodologies of other RSUs, focused on those that have changed since formation of their RSU and looked for common themes.

# RSU5 Finance Committee Overarching Goals

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*The Finance Committee considered the following criteria in its evaluation of the cost-sharing factors based on direction from the RSU5 Board, RPC Plan Recommendations, Town Leadership Recommendations, and Finance Committee Recommendations:*

- **Transparent & Easily Understood**
- **Variable**
- **Fair**
- **Not Overly Burdensome to Any Individual Town**

# Current Cost Sharing Method

***Required Local Contribution<sup>1</sup> + Local Cost Sharing<sup>2</sup> + Total Outside Contribution to the RSU<sup>3</sup>***

1. ***Required Local Contribution*** per ED 279 Section 4.C.
2. ***Local Cost Sharing*** includes:
  - Amount raised above ***Required Local Contribution*** to meet ***Mil Expectation*** (i.e., ED 279 Section 4.B. minus 4.C.)
  - ***Additional Local Money*** pursuant to the Cost Sharing Formula.
3. ***Total Outside Contribution to the RSU*** includes all revenue from the state, except state-funded debt service.
  - Subsidy (i.e., Difference between EPS Cost Allocation and Required Local Contribution by Municipality per ED 279 Section 4)
  - Minimum Special Education Adjustment per ED 279 Section 5.A.4.
  - Any Other Adjustments in ED 279 Section 5.B., such as Regionalization and Efficiency Assistance.



# Current Cost Sharing Formula

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***Additional Local Money*** - Member municipalities shall pay the following shares of each year's total Additional Local Money for the RSU:

Durham:	21.42%
Freeport:	65.98%
Pownal:	12.60%

*Per the RPC FAQs #4 & #6 (09/28/2008), these percentages were based on the percentage of ALM costs each town generated prior to consolidation in the base year (i.e., 2007-2008).*

# Current Cost Sharing Method vs Overarching Goals

GOAL	YES	NO
Transparent & Easily Understood		✓
Variable		✓
Fair	✓	
Not Overly Burdensome to Any Individual Town	✓	

# Non-Exclusive Criteria for Changing the Cost-Sharing Method

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*The RSU Board shall consider all factors it deems relevant, but must consider the following criteria:*

1. *Fairness of the cost-sharing method in light of at least the following factors:*
  - *Relative state valuations, representing each member municipality's ability to raise revenue;*
  - *Relative populations, representing each member municipality's board representation in the budgeting process; and*
  - *Student head counts, representing each member municipality's student usage of RSU facilities and programs;*

## Non-Exclusive Criteria for Changing the Cost-Sharing Method

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2. *The effect of the cost-sharing method on the RSU's ability to raise sufficient funds to sustain educational programs deemed to be in the best interests of RSU students;*
3. *Clarity of the method, including ease with which the public can understand the method, and avoidance of uncertainty over the method's application;*
4. *Consistency of the method with the operation of the RSU as a single, cohesive entity;*
5. *Effect of the method on the stability of RSU revenue streams and local taxpayer obligations.*

# Evaluation of Cost-Sharing Factors

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## Required Local Contribution

Minimum Special Education Adjustment

Calculated Mil Rate

Mil Expectation

## Additional Local Money

State Valuation

Pupil Counts

Population

Tax Increment Financing (TIFs)

Historical Spending

Median Household Income



# Glossary

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***Additional Local Money*** means Total RSU Spending Budget minus Total Outside Contribution to the RSU minus Total Required Local Contribution.

***Applicable Mil Rate*** under the current cost sharing method is identical for all member municipalities in any single year and is equal to the ***Mil Expectation*** per ED 279 Section 4.B.

***Calculated Mil Rate*** is the mil rate required to raise the municipality's ***Required Local Contribution***, per ED 279 Section 4.C.

***Local Cost Sharing*** under the current cost sharing method includes:

- Amount raised above ***Required Local Contribution*** to meet ***Mil Expectation*** (i.e., ED 279 Section 4.B. minus 4.C.)
- ***Additional Local Money*** pursuant to the Cost Sharing Formula.

# Glossary

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***Mil Expectation*** is the full value education mil rate calculated in MRS, Title 20-A, Section 15671-A(2) and is listed in Section 4.B. of the ED 279.

***Minimum Special Education Adjustment*** applicable to Freeport only. This is the additional amount above the State Contribution in ED 279 Section 4.C. which is necessary to meet the guaranteed minimum state share of Freeport's portion of the Special Education Allocation in ED 279 Section 3.A. Calculated in accordance with MRS, Title 20-A, Section 15689(1)(B) and is the amount listed in ED 279 Section 5.A.4. As established by MRS, Title 20-A, Section 15689(1-B), this adjustment is applicable to municipalities part of a school administrative unit in existence prior to formation of the new regional school unit which received an adjustment in fiscal year 2007-08 or 2008-09. Freeport received the adjustment in fiscal year 2007-08.

# Glossary

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**MRS, Title 20-A, Section 15688(3-A)B.** For a school administrative district, community school district or regional school unit composed of more than one municipality, each municipality's contribution to the total cost of education is the lesser of:

- (1) The municipality's total cost allocation from Section 4.A. of the ED 279.
- (2) The total of the full-value education mil rate multiplied by the property fiscal capacity of the municipality from Section 4.B. of the ED 279.

**Required Local Contribution** established by MRS, Title 20-A, Section 15688(3-A)B.

**Total Outside Contribution to the RSU** under the current cost sharing method consists of all revenues received by the RSU from sources other than municipal tax revenues for a given year, minus an amount equal to principal and interest payments on State-participating debt.

# Glossary

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***Total Required Local Contribution*** under the current cost sharing method is the member municipalities' most recent total state valuation multiplied by the ***Applicable Mil Rate***. In accordance with the Reorganization Plan prepared by the RPC (9/18/2008), the Total Required Local Contribution for a member municipality may exceed the member municipality's local cost share expectation under the Essential Programs and Services ("EPS") provisions (Title 20-A, Chapter 606-B) of the Maine Revised Statutes. Notwithstanding anything to the contrary in the Plan, however, each municipality's required contribution to the "total cost of education", as defined in Title 20-A, Section 15688 shall be the amount established by Section 15688(3-A), or successor provisions of state law, and any additional amount required hereunder shall be for purposes of local cost sharing. The ***Total Required Local Contribution*** under the current cost sharing method is the amount listed in ED 279 Section 4.B. (i.e., the ***Required Local Contribution*** plus the additional amount raised under ***Local Cost Sharing*** to meet the ***Mil Expectation***).





# ***Town of Durham***

***630 Hallowell Road***

***Durham, Maine 04222***

*Item #12.  
Handout #1*

**Tel.: (207) 353-2561**

**Fax: (207) 353-5367**

**August 29, 2018**

**Dear Members of RSU 5 Finance Committee:**

Thank you for the opportunity to participate in RSU 5 Finance Committee meetings this past spring and provide feedback regarding your review of the RSU 5 Cost Sharing formula. Thank you also for your follow-up letter dated May 29, 2018, requesting input on any additional factors the Durham Board of Selectmen ("Board") think should be considered by the RSU 5 Finance Committee ("Committee").

The factors to be considered listed in your letter seem to be quite comprehensive and should allow for a thorough review of the formula. At the end of the review process, a successful formula will be one that has the following characteristics:

- \* Is based on a calculation easily understood by the average citizen in the RSU
- \* Is considered "fair" by the average citizen in the RSU
- \* Is based on objective criteria that allocates tax burden in a manner consistent with how tax burden is allocated at the municipal level for other purposes.
- \* Is stable and changes only slightly from year to year

The Board has some specific input regarding the two major components of each Town's payments to the RSU.

## **Required Local Contribution (RLC)**

In the interest of fairness and transparency, it is the opinion of the Board that the Required Local Contribution for each town should be taken directly from State calculations on the ED 279 report, and not be adjusted by the RSU.

## **Additional Local Monies (ALM)**

The primary function of the Cost Sharing Formula is to allocate the tax burden for ALM across the three towns in the RSU. It is the opinion of the Board that this allocation should be based exclusively on the proportional State Valuation of each Town as listed on the ED 279 report. This would be consistent with the current state-wide practice of allocating Municipal tax burden based on local property valuations.

Sincerely,

**Kevin Nadeau**

**Durham Board of Selectmen Chair**

**CC via email: Pownal Board of Selectmen  
Freeport Town Council**





## TOWN OF FREEPORT

30 Main Street, Freeport ME 04032  
ph: 865-4743 fax: 865-0929  
[www.freeportmaine.com](http://www.freeportmaine.com)

October 2, 2018

RSU 5 Board of Directors  
C/o Michelle Ritcheson, RSU 5 Board Chair  
17 West Street  
Freeport, ME 04032

RSU5 Finance Committee  
C/o Kathryn Brown, RSU 5 Finance Committee Chair  
17 West Street  
Freeport, ME 04032

Dear Michelle and Kate,

As you are aware, earlier this year the RSU 5 Finance Committee began a process to examine the cost sharing formula that is used to apportion the “additional local monies” paid annually by each member Town of RSU 5. At the invitation of the Finance Committee, members of the Freeport Town Council have participated in this process.

On August 14, 2018, in response to the Finance Committee’s request for input, the Town of Freeport submitted a letter to the Finance Committee identifying two issues with respect to the calculation of Freeport’s share of the RSU 5 Required Local Contribution and the application of Freeport’s minimum special education adjustment to reduce Freeport’s required local contribution. This letter is attached and is incorporated by reference for the RSU 5 Board’s consideration. Additionally, the comments below are provided by the Town of Freeport in response to the RSU 5 Finance Committee’s September 18, 2018 email invitation to submit additional feedback in advance of the RSU 5 Board’s October 10, 2018 meeting.

Due to the Freeport Town Council’s participation in the Finance Committee process for examining the cost sharing formula, this matter was studied by individual Councilors, and was also discussed by the Town Council as a whole. As a result of these investigations and discussions, the Freeport Town Council believes that it is appropriate to transition the cost sharing formula from a formula based on both equalized valuation by town and pupil count by town, to a formula based solely on pupil count per town. As under the current formula, we would expect that this cost sharing formula would be applied only to the “additional local monies” portion of the overall district funding formula, which accounted for approximately 31% of RSU 5 district-wide funding for Fiscal Year 2018.

We see the benefits of moving to a “per-pupil” cost sharing method of apportionment to be as follows:

- 1) It is easy to understand. In our opinion this method is the easiest way for residents of member communities to understand changes in each town's annual apportionment of costs from year to year. Under the current method of apportionment, abstract factors such as building and development trends, town-wide (i.e. aggregate) property valuations, and state equalized valuation per town can cause changes in the amount of total district costs that are billed to each member community, even in a year where the pupil count per town remained constant from the previous year. Moving to a formula based on annual pupil count per town could help to alleviate this confusion.
- 2) It is transparent. A formula based on pupil counts can be verified by the average resident using simple math, encouraging confidence in the calculation of the apportionment of district-wide costs. By contrast, the current formula is difficult to understand and replicate, even for individuals who have spent a great deal of time studying how it is calculated.
- 3) It is fair. Pupil counts are a direct corollary to the demand that a member community places on the RSU 5 district as a whole. If a member community's number of pupils relative to the other communities in the district goes up, so would its costs. If the number goes down, the member community would likewise see a corresponding decrease in costs.

Concerns have been raised that moving to a formula based solely on a pupil count per town could expose member communities to “swings” in apportionment based on changing pupil enrollments. We feel that using a two or three year rolling average of pupil enrollments could help to alleviate some of these concerns, and would support this approach if the Board of Directors chose to pursue it further.

Additionally, it has been suggested by another member community that a formula based either completely or partially on equalized valuation by town (similar to the current formula) would be the most advantageous for the RSU. While equalized valuation does provide a conveniently accessible number to base cost sharing calculations on, we feel that it does not necessarily represent the “fairest” or most equitable way to divide the financial responsibility for funding the RSU. Specifically, a higher equalized property valuation does not necessarily correlate to the ability of the residents of that community to shoulder a higher percentage of the financial burden to support the RSU. For example, as shown in the table below, while Freeport ranks highest among the three RSU 5 towns in terms of equalized property valuation measured both in the aggregate and per capita, when ranked by median household income, Freeport falls squarely in the middle between Pownal and Durham. As evidenced by the median household income figures below, a higher equalized state valuation does not necessarily correlate to a greater “ability to pay” by the residential property taxpayer.

Town	Population <sup>1</sup>	EQ State Valuation <sup>2</sup>	EQ Valuation Per Capita	Median Household income <sup>3</sup>
Pownal	1,737	228,250,000	131,404.72	82,333
Freeport	8,242	1,462,950,000	177,499.39	75,147
Durham	3,918	339,850,000	86,740.68	71,118

Sources: (1, 3) US Census Bureau – American Community Survey 2016

(2) Maine Revenue Services – State Valuation 2016

The Town Council appreciates the opportunity to provide input on this important issue. If you should have any questions about our position, we would be glad to meet with the RSU 5 Board of Directors in person to discuss it in more detail.

Sincerely,



Sarah B. Tracy

Freeport Town Council Chair

On Behalf of the Freeport Town Council, per Town Council approval dated October 2, 2018

Cc: Durham Board of Selectmen (and women) (via email)  
Pownal Board of Selectmen (and women) (via email)



## TOWN OF FREEPORT

30 Main Street, Freeport ME 04032  
ph: 865-4743 fax: 865-0929  
[www.freeportmaine.com](http://www.freeportmaine.com)

August 14, 2018

Dear Members of the RSU5 Finance Committee:

The Freeport Town Council ("Council") received your May 29, 2018 letter requesting that the Council provide any additional factors to be added to the RSU5 Finance Committee's consideration of the RSU5 Cost Sharing Formula.

In light of the language in the original reorganization plan creating RSU5 that the fairness of the cost sharing method should be considered when determining any change to the RSU5 Cost Sharing Formula, the Council believes that the following two issues, which the Council became aware of through its participation in the RSU5 Finance Committee's Cost Sharing Formula reconsideration process, should be brought to your attention and deliberated in your upcoming cost-allocation formula process:

1. Currently, RSU5 bases the "RSU Plan Required Local Contribution" to fund the essential programs and services provided by RSU5 on the calculation of each RSU5 member municipalities' average state valuation multiplied by the state's mill expectation ("RSU5 Required Local Contribution") rather than on the state's calculated "Required Local Contribution by Municipality." This value is currently higher for the Town of Freeport than the State's calculated "Required Local Contribution by Municipality." Because Freeport's required contribution is higher under "RSU5 Required Local Contribution" calculation than under the State's "Required Local Contribution by Municipality," this reduces the "additional local monies" that the other communities of RSU5 contribute.

For example, for the 2018-2019 fiscal year, Freeport's RSU5 "Required Local Contribution" (average state valuation multiplied by the state's mill expectation) is \$12,694,792.50. Alternatively, Freeport's state calculated "Required Local Contribution by Municipality" is \$12,484,914.27. Accordingly, Freeport pays \$209,878.23 more under the "RSU5 Required Local Contribution" calculation than it is required to contribute per the state's "Required Local Contribution by Municipality" calculation.

The Council believes that the RSU5 Finance Committee should consider whether it is appropriate for Freeport's required local contribution to RSU5 to be calculated consistently with the state's Required Local Contribution by Municipality. If this were the case, any difference that needs to be contributed to fully fund the RSU5 budget, would then be included in the "Additional Local Monies" category, which Freeport would pay according to its proportional

share (*i.e.* under the current proportional share allocations, Freeport would pay 65.98% of the \$209,878.23, which is \$138,477.66, rather than 100% of the entire \$209,878.23 amount).

2. Additionally, the Council observes that Freeport's minimum special education adjustment (which, for the 2018-2019 fiscal year is \$835,757.00), is not being applied at 100% to reduce Freeport's required local contribution. Rather it is being credited in the category of additional local monies, which means that Freeport only gets credit for 65.98% of this amount (which in the 2018-2019 fiscal year would equal \$551,432.47). This means that Freeport is paying \$284,324.53 more toward Freeport's Additional Local Monies than if Freeport's minimum special education adjustment were applied 100% towards Freeport's required local contribution.

Again the Council requests that this issue be further investigated and deliberated by the RSU5 Finance Committee as part of its upcoming process.

The Council is happy to make the Finance Director for the Town of Freeport, Jessica Maloy, available to discuss this issue with the RSU5 Finance Director in the event that further explanation is needed.

The Freeport Town Council appreciates the opportunity to be involved in the Committee's process to-date and we are happy to answer any additional questions that are relevant to the RSU5 Finance Committee's determination of whether and how to change the RSU5 Cost Sharing Formula. The Council asks that the Committee continue keep the Freeport Town Council, and Board of Selectmen (and women) of the Towns of Durham and Pownal, apprised of the Committee's work. In particular, the Freeport Town Council and the Select Boards of Pownal and Durham be provided with an opportunity to comment on any proposed revised Cost Sharing Formula when the Committee gets to that point in the process.

Sincerely,



Sarah B. Tracy  
Freeport Town Council Chair

Cc: Pownal Board of Selectmen (and women) (via email)  
Durham Board of Selectmen (and women) (via email)



# **Town of Pownal**

*Independent Unto Itself*

September 24, 2018

Dear Members of the RSU5 Finance Committee:

The Pownal Selectmen received your May 29, 2018 letter requesting that the Selectmen provide any additional factors to be added to the RSU5 Finance Committee's consideration of the RSU5 Cost Sharing Formula.

And, after reading and considering both the Town of Freeport and the Town of Durham's letters, the Pownal Selectmen wish to respond.

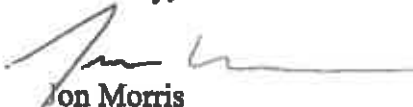
The original cost sharing co-efficient was determined by taking Pownal's additional local co-efficient while it was an independent school district. Lacking any other starting that seemed like a good compromise, understanding that the Cost Sharing Formula would be re-considered. That ALM included multiple factors that are not germane to the current RSU 5 relationship, factors involved in running its own district. That co-efficient is now capricious.

Any cost sharing formula that does not include student population is inherently unrealistic. The Town of Durham's contention that this is a statewide practice is incorrect. There are many situations where towns which are in a high valuation/low student population where a ratio of valuation/ student population is in effect. Consider if Pownal had 12 students!

Freeport's contention concerning the minimum special education adjustment is correct with the exception that the adjustment pertains to the Freeport High School special education budget, which at the time included Pownal students, hence the compromise at the formation of the RSU. The Finance Committee would have to backtrack to the original minutes and explore the ratios of SPED student in the high school.

Pownal Selectmen suggest a Cost Sharing Formula based on a ration of valuation/ student population somewhere around 60/40.

Sincerely,

  
Jon Morris  
Chairman  
Pownal Board of Selectmen



Revised September 28, 2008

### **FAQ's**

1. Where will the funding come from to pay for the costs of running the RSU?
  - a. Funding to cover the costs of the RSU come from three sources. They are:
    - i. Required Local Contribution – the required amount that must be raised locally to qualify for state subsidy. This is usually represented as the standard mil rate across the state for education. In the base year (2007-2008) used by the RPC for analysis purposes the state mil rate was 7.44 mils.
    - ii. State Subsidy – this is the amount of state funding that will be provided to the school unit if the Required Local Contribution is approved locally.
    - iii. Additional Local Monies – this is the amount that will be raised locally in addition to the Required Local Contribution by the members of the school unit.
2. How will each of the components in #1 above be allocated to each of the member towns?
  - a. Each town will contribute the Required Local Contribution through the "standard" mil rate determined by the state.
  - b. The state subsidy will be calculated in total for the RSU, not for each local town, and will be paid directly to the RSU by the state.
  - c. The Additional Local Monies will be shared among the three towns using a cost sharing formula developed by the RPC.
3. How much of the total RSU expense is represented by the Additional Local Monies and therefore subject to the cost sharing formula of the RPC?
  - a. Approximately 15% based on the 2007-2008 school budgets for the three school districts.
4. How will the Additional Local Monies be shared under the RPC cost sharing formula?
  - a. The RPC determined that Additional Local Monies (ALM) should be shared on the same ratio as those costs were incurred in the base year (budgets for school year 2007-2008). According to the plan, this cost sharing method would stay in place for five (5) years to give the RSU and its board time to gain experience in the operation of new school unit. The cost sharing method could be changed as early as three years under provisions of the plan.

5. How much of the ALM will each town be allocated based on the cost sharing formula described above?
  - a. Durham – 21.42% or \$856,80
  - b. Freeport – 65.98% or \$2,640,000
  - c. Pownal – 12.6% or \$504,000
  
6. I have heard people who favor sharing costs on the basis of each town's valuation and other people who favor sharing costs on the basis of each town's student population. Are towns that are paying less than their share of valuation getting off too easy? What about towns that are paying less than their share of the student headcount?
  - a. No. The RPC believes the cost sharing formula is the fairest way to distribute the ALM costs across the RSU at this time. While there are arguments in favor of using student headcounts and in favor of using valuation, there are arguments against each approach as well. The original consolidation law would have required use of the valuation approach. The law was changed to allow the use of alternative cost-sharing approaches, and the RPC adopted a middle approach, between the extremes of valuation and headcount, that it believes is the best way for the RSU to get on its feet.
  - b. The percentages used to allocate the ALM are based on the operating costs in the ALM for the base school year 2007-2008. Each town pays the same percentage of ALM as the percentage of ALM costs that it generated prior to consolidation in the base year. So, for the base year, Durham, Freeport and Pownal generated 24.42%, 65.98% and 12.6% of the ALM costs respectively and will be asked to continue to bear those shares in the initial years of the RSU as a fair estimate of the share of the ALM costs attributable to each town.
  - c. In the early years of the RSU it is unlikely that there will be major program shifts so it can be assumed that the spending patterns will remain similar. As the RSU matures over time the RPC plan allows for the cost sharing formula to be changed should that be necessary.
  - d. The table below shows each town's base-year share of student headcount and valuation, as well as its ALM cost-sharing percentage as set forth in the consolidation plan:

	Valuation	Cost-Share	Headcount
Durham	16.1%	21.42%	29.05%
Freeport	75.0%	65.98%	59.74%
Pownal	8.9%	12.60%	11.20%

7. Were any other cost sharing plans considered by the RPC?
  - a. The Finance Committee of the RPC developed a financial model that considered seven (7) different cost sharing scenarios for ALM. Many of

these scenarios were developed as a result of feedback received at the public meetings held in the three towns.

8. What were the cost scenarios that were considered?
  - a. The Finance Committee considered the following cost sharing scenarios:
    - i. #1 – share ALM costs based on the operating cost ratios for the base year; share debt for the high school and administrative offices starting in year 1; phase in other assumed debt (Durham Elementary, Freeport Middle School and post 2003 CIP) over five (5) years; non assumed debt would be a) debt on existing Durham elementary school; b) pre 2004 capital improvement debt in Freeport; and c) the Mast Landing School debt in Freeport.
    - ii. #2 – Same as #1 above, but the only debt to be shared is the high school and the administrative office debt. This is the approach ultimately recommended by the RPC.
    - iii. #3 – Same as #1 except share the high school costs on a per pupil basis.
    - iv. #4 – Share all ALM on a per pupil basis.
    - v. #5 – Same as #1 except share all debt assumed by the RSU on a per pupil basis.
    - vi. #6 – Share ALM on the basis of town valuation – this is as prescribed in the original school consolidation law, but was subsequently changed to allow local RPCs to adopt their own cost sharing formula.
    - vii. #7 – Same as #1 except share ALM on a per pupil basis starting in year 4 and phasing this in over 10 years with a cap of 60% of the ALM to be shared on a per pupil basis.
9. Is the model that was prepared by the RPC a budget for the new RSU?
  - a. No. Preparing a budget for the new RSU is beyond the scope of the tasks assigned to the RPC and will be the responsibility of the new RSU board once they are elected. The model is a tool used by the RPC to show the effect of various assumptions and scenarios in determining a fair cost sharing methodology and in making gross assessments of the financial feasibility of consolidating. The model can show the relative effect a change in cost sharing scenario could have on one member of the RSU vs. another, both in the short term and long term. A budget, when prepared by the RSU board, will be the estimated costs of running the RSU for a particular time frame and will include all of the specific operating and program decisions that only the RSU board has the authority to make.
10. What are the basic assumptions included in the financial model used by the RPC?
  - a. The financial model used to evaluate the different cost sharing scenarios included the following key assumptions (all in constant dollars):
    - i. There would be \$100,000 of administrative cost savings as a result of consolidating the three school districts.

- ii. There would be a "leveling up" of contract salaries beginning in year three in the amount of \$250,000 as a result of consolidating the three school districts.
- iii. High School students from Durham would migrate to Freeport High School over time and would not all move in one year.
- iv. The incremental cost of additional high school students in Freeport would be \$4,000 per student. This is referred to in the model as the "capacity cost".
- v. There is a net cost reduction for each Durham Student migrating to Freeport High School. This is due to the fact that in the base year Durham is paying \$7,715 in tuition outside of their district for their high school students. Since the estimated incremental cost for each student when they move to Freeport is \$4,000 the net benefit is \$3,715 in avoided costs per student to the RSU.
- vi. No increase in capacity is required at the current Freeport High School facility.
- vii. "State debt" is assumed to be paid for by the state on a dollar for dollar basis.

11. How was the \$100,000 of administrative savings determined?

- a. For the administrative savings, the three existing superintendents evaluated the current administrative structure in the three school districts and came up with a recommendation of the changes that could be made in that structure if the three school units were consolidated into one unit. For example, the three towns currently pay 1.8 full-time-equivalents (FTEs) for their superintendents. The RSU will have only a single superintendent, resulting in a savings of a little over \$70,000. Not every function or position, however, will see savings. For example, human resources currently accounts for only three-tenths of an FTE, but in the RSU, we expect there will be a full-time HR professional, accounting for a full FTE in that position, a cost increase estimated to be just over \$20,000. In addition to a line-item estimate of these FTE changes for administrative personnel, administrators provided the RPC with an estimate of system administration cost savings.
- b. There is uncertainty in these estimates, given the uncertainty in how the RSU Board ultimately will choose to staff the RSU. For example, Freeport currently provides contracted curriculum services at a cost of \$30,000. The RPC favors, following the recommendation of the Education Subcommittee, the hiring of a full-time curriculum coordinator. The additional estimated cost is \$50,000. Whether such a hire would be made lies in the discretion of the RSU Board. Other positions assumed to go from a partial FTE to a full FTE might ultimately not increase that way, depending on workload and staff capabilities. For example, the three towns use a combined 1.25 FTEs for Accounts Payable and Bookkeeper/Payroll, and the administrators estimated two full-time staff serving those functions in the RSU. The difference between splitting

those functions among two FTEs versus combining them into a single FTE is roughly \$45,000.

- c. Netting the cost increases and decreases in administrative salaries, yielded an estimated administrative savings of \$64,479, subject to the uncertainties described above. For example, if the RSU Board chose to fund curriculum coordination only at the current level, without hiring a curriculum coordinator and chose to use a single FTE for accounts payable and other bookkeeping functions, the cost savings would increase to roughly \$160,000. In light of the uncertainties in the estimation process, the Finance Subcommittee used a figure within this range, \$100,000, as its estimate for administrative cost savings.

12. What are "leveling up" costs and where do they come from?

- a. The \$250,000 "leveling up" costs are the result of evaluating the three different teacher contracts that currently exist and bringing them together under a uniform salary structure. This calculation was performed by the respective business offices of each of the school units.

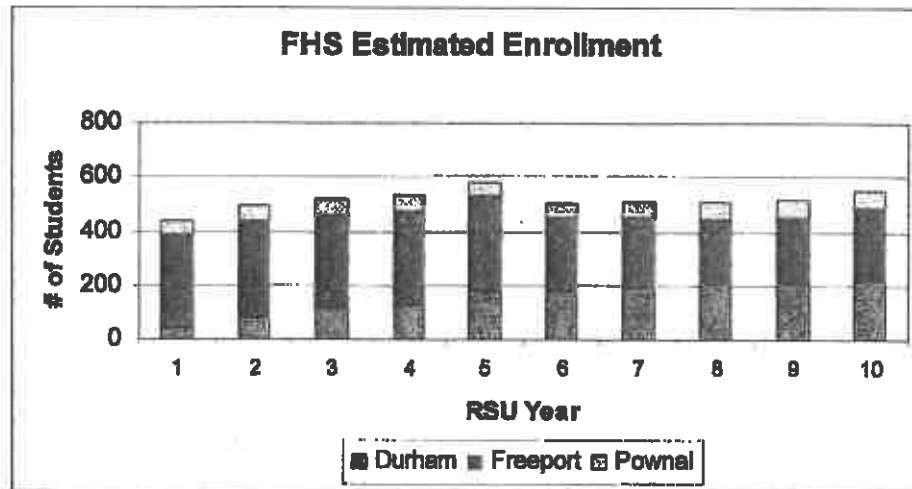
13. What is the "capacity cost" used in the model and how was the amount determined?

- a. The \$4,000 capacity cost or, incremental cost per student at Freeport High School, comes from an analysis performed by the Freeport school administration on what additional costs would be incurred to bring the Durham high school population into the current high school building. This cost assumes that sufficient staff would be hired to maintain the current student/teacher ratio.

14. Why is the incremental cost per student (\$4,000) at Freeport High School so much different than the average cost per student, which I understand is about \$10,000 per student?

- a. While it does not cost any less to educate the incoming Durham students, or for that matter, any new Freeport or Pownal students, than it does a student that is already at Freeport High School (FHS) there are certain fixed costs that do not change as a result of adding more students into a facility that has available capacity. Therefore, the average cost per student will decrease as more students are added to the existing facility. For instance, the cost of operating the FHS building is pretty much the same whether the building houses just Freeport students or Freeport, Pownal and Durham students. On the other hand, the same is not true for teaching staff. Initially, as new students enter the high school they will be absorbed within the existing classroom structure. Eventually though, there will be a sufficient increase in the number of students or class sizes that new staff will have to be hired to maintain the current student/teacher ratios. The capacity cost assumes this new staff will be hired to accommodate the additional students.

15. What is the projected enrollment for Freeport High School and what is the capacity of the current building?
- a. The current capacity of the existing facility is 600 students. The projected enrollment for the high school using data provided by each of the school units is shown in the chart below.



16. I have heard that the current building isn't even sufficient for the students currently at Freeport High School -- students cannot eat their lunch in the cafeteria, classes have to be held in a trailer. Why did you assume that the building has sufficient capacity for 100 or more additional students?
- a. The existing building currently has vacant instructional space during every instructional period, and the superintendent and principal advised the RPC that they believed the space was sufficient to accommodate the expected additional students in the RSU. The RPC commissioned a capacity study by outside experts to determine whether the opinion of the administrators could be confirmed. And it was.
- b. The trailer referred to is not used by Freeport because classrooms are full. The trailer is used for a special instructional program that, for instructional purposes, is physically separated from the FHS building.
- c. The cafeteria is not large enough to accommodate the current population, even using staggered lunchtimes, and even with Freeport's steadily declining enrollment; it would not be large enough to accommodate the population anytime in the foreseeable future. Freeport has been using a single lunch period, with students free to eat where they choose. That approach can continue, even with 100+ additional students, going forward. No capacity cost was included for a cafeteria build-out for two reasons. First and foremost, based on the fact that Freeport to date has not expanded its cafeteria, it appears that all of the relevant constituencies (students, faculty, administration and parents) like the current approach to



lunchtime, and we expect that to continue. Second, should the RSU Board elect to build out the cafeteria, it is not clear that such a build out would involve any increased capacity cost for the RSU; the State might very well fund the debt for such a project in the RSU. This is the type of capital project, however, for which state funding would be put in jeopardy by the penalty provisions applicable to any town that does not enter into an approved unit under the consolidation law.

17. How is existing debt handled in the financial model and in the cost sharing formula?

- a. Existing debt in any of the school units is handled in either of two ways.
  - i. High School and Administrative Offices debt – In as much as these facilities will be shared resources at the beginning of the RSU then any debt service costs will be included in the costs to be shared by the RSU members.
  - ii. All other debt – In as much as the facilities for which this debt was incurred are not being shared at the beginning of the RSU then all debt service will remain with the town which incurred the debt.
  - iii. Future debt of the RSU incurred by the RSU after formation will be shared by the RSU based upon the cost sharing formula in use when the debt is incurred.

18. How do penalties come into play in the financial model considered by the RPC?

- a. First, penalties only apply where a community decides to not consolidate and otherwise does not have an exemption or other approval from the Department of Education to “go it alone”. Penalties therefore appear as a cost for a town in the “stand alone” scenario, but not as a cost in the consolidation scenario.
- b. The amount of penalty for each town as estimated by the Department of Education on June 10, 2008 is shown below. This penalty is assessed annually and will change as the student headcount changes and as the valuation of the town changes.

Durham - \$105,332

Freeport - \$315,192

Pownal - \$48,111

- i. In addition to the penalty that can be calculated above there are other considerations that need to be included when looking at the penalty provisions of the law, which could include less favorable consideration by the state in regard to future school construction.

19. Would my town be better off financially to "go it alone" and pay the penalty?
- a. The finance committee looked at each of the scenarios and compared it to each town on a stand alone basis. The selected cost sharing formula vs. stand alone is as follows:  
  
Durham – selected scenario is the same as standing alone;  
Freeport – selected scenario is 6% less expensive vs. standing alone;  
Pownal – selected scenario is 3% less expense vs. standing alone.  
  
i. When factoring in the non-financial benefit of consolidation the RPC concluded that each community would benefit from consolidation as a whole.
20. What are the size, composition, and voting percentage of the new Regional School Union's Board of Directors?
- a. The Board will be made up of 11 members serving staggered 3 year terms. Freeport will have 6 members with 96 votes each, Durham will have 3 members with 96 votes each, and Pownal will have 2 members with 58 votes each.
21. How was the structure and composition of the Board decided?
- a. The Board must conform to "one person one vote", so the composition must have proportionate representation. This is why Freeport, the largest community, has the most members. To ensure Pownal has two representatives it was necessary to give each of those members a lesser voting power.
22. How will the Regional School Unit Board be elected?
- a. Each community will elect its representatives to the Board.
23. What is the timeline for voting to approve the Regional School Union, selecting the Board, and starting the new school system?
- a. An approval vote for the Consolidation Plan will occur at the general election in November 2008. If all three communities approve the Plan, the new Board will be elected at the beginning of February 2009. The Board will then begin its administrative duties to allow the new School Union to be fully functional on July 1, 2009. The Board will be responsible for hiring the new School Union's superintendent, creating a budget, and implementing school policies and procedures.
24. How are budgets and capital expenditures decided under a new RSU?
- a. The RSU Board will develop proposed budgets and capital expenditures. There will then be a School meeting to approve recommendations, and the voters in the three communities will then vote on whether to approve the budgets and expenditures.

25. What if one or more of the communities does not approve the Consolidation Plan in November 2008?

- a. If any of the communities vote against the Plan, the Regional Planning Committee must consider alternative plans for submission to the State Department of Education, and then, again, to the voters of the communities. This could be with the same partners or different partners. If no consolidation plan is adopted by July 1, 2009, communities and their schools may be subject to State penalties starting with the current fiscal year.

[REDACTED]

[REDACTED]

[REDACTED]

- a. An Alternative Plan is submitted by an SAU that proposes to meet the required reductions in costs without partnering with other SAU's. An alternative plan may be submitted only by a unit that is:
  - i. An offshore island
  - ii. A school operated by a tribal school committee
  - iii. A school administrative unit that serves more than 2500 students or 1200 students where circumstances justify an exception to the requirement of 2500 students
  - iv. A school administrative unit that is designated as an efficient, high-performing district. A school administrative unit is designated an "efficient, high-performing district" if:
    - 1. It contains 3 schools identified as "higher performing"
    - 2. Its reported 2005-2006 per pupil expenditures for system administration represents less than 4% of its per pupil expenditures

[REDACTED]

- a. The current Plan is an alternate plan. The three towns have less than 2500 students, but more than 1200 students.

[REDACTED]

- a. An alternative organizational structure (AOS) is a regional school unit and still requires communities to function as a single school system that reports a single budget to the Department of Education, receives a single subsidy check, and has a common core curriculum and procedures for standardized testing and assessment. An AOS files reports with the state as

a single unit and must adopt consistent school policies, and a plan for achieving consistent collective bargaining agreements. (Separate collective bargaining agreements are allowed, provided they are consistent.)

The plan for an AOS must also include an interlocal agreement and a plan for presenting, approving, and validating the annual school budget that ensures K-12 budget transparency for its members and their voters. The law requires a plan to achieve that goal; it does not specify the details of how it must be achieved.

[REDACTED]

**13-A. Plans to reorganize administration, transportation, building and maintenance and special education.**

The analysis of the reorganization that has been conducted does not provide any clear assurances of immediate savings. This is due in part to immediate start up costs associated with forming the RSU (costs for audits, merging of systems, legal fees) as well as increases in personnel that might be necessary.

The RSU is unique in that it merges one municipal system, one single-town SAD and one town of a two-town School Union. There are no full time system administrators in either the SAD (Pownal) or Durham.

For example, where three towns joining together might have three Superintendents, three Business Managers, three Special Education Directors, and three Transportation Directors, this RSU has 1.8, 1.4, 1.3 and .5 respectively.

Arguably, the largest cost saving in a merger initially is downsizing personnel and associated benefits. There is a possibility the new RSU Board may find it needs to create new staff positions to be certain these areas receive the necessary oversight, coordination, and review so they are in compliance with all mandates that apply. The costs are not known, nor is it known if the new RSU Board will or will not create new positions. We cannot bind future RSU Boards to positions and associated costs. Therefore, all numbers associated with future positions are speculative in nature, if not conjecture.

**13-B. Cost Sharing in the RSU**

**A. Definition of Terms**

*Additional Local Money* shall mean Total RSU Spending Budget minus Total Outside Contribution to the RSU minus Total Required Local Contribution, each as defined below.

*Total RSU Spending Budget* shall consist of all monies budgeted to be spent by the RSU in a given year, minus principal and interest payments on State-participating debt

*Total Outside Contribution to the RSU* shall consist of all revenues received by the RSU from sources other than municipal tax revenues for a given year,

minus an amount equal to principal and interest payments on State-participating debt.

***Total Required Local Contribution*** shall be the member municipalities' most recent total state valuation multiplied by the Applicable Mill Rate. The Total Local Required Contribution for a member municipality may exceed the member municipality's local cost share expectation under the Essential Programs and Services provisions (Title 20-A, Chapter 606-B) of the Maine Revised Statutes. Notwithstanding anything to the contrary in this Plan, however, each municipality's required contribution to the "total cost of education," as defined in Title 20-A, Section 15688 shall be the amount established by Section 15688(3-A), or successor provisions of state law, and any additional amount required hereunder shall be for purposes of local cost sharing.

***Applicable Mill Rate*** The Applicable Mill Rate shall equal the Full-Value Mill Rate, as defined under 20-A M.R.S.A. § 15671-A or any successor statute. Should the State cease calculating a Full-Value Mill Rate, the Applicable Mill Rate shall be the prior year's Applicable Mill Rate. The Applicable Mill Rate shall be identical for all member municipalities in any single year. If the Full-Value Mill Rate is higher than the amount required to support the Total RSU Spending Budget, the Applicable Mill Rate shall be reduced accordingly.

#### **B. Cost Sharing**

Member municipalities shall pay the following shares of each year's total Additional Local Money for the RSU:

Durham:	21.42%
Freeport:	65.98%
Pownal:	12.60%

In addition to its obligation to pay its share of Additional Local Money, each member municipality must pay to the RSU its Total Required Local Contribution (as defined above), and a member municipality whose Pre-Existing Debt (or any portion thereof) is Non-RSU Debt must further pay to the RSU the total for that year of debt service for any such Non-RSU Debt Service payable by the RSU as fiscal agent under Section 6.B of this Plan

#### **C. Changes to the Cost Sharing Method**



The Cost Sharing Method shall not be changed for the first three years. Following that transition period, the Cost Sharing Method may be changed, but shall not be required to be changed:

1. By a vote of the RSU Board meeting the following criteria:
  - at least one Board member from each member municipality must be present; and
  - Board members representing two-thirds or more of the RSU population must vote in favor of the change; or
2. Upon a vote of a simple majority of the RSU Board, proposal for a change to the Cost Sharing Method may be put out to referendum for amendment in accordance with Section 14.

#### **D. Non-Exclusive Criteria for Changing the Cost-Sharing Method**

In the exercise of its discretion to determine any change to the cost-sharing formula to be used at any time following the transition period, the RSU Board shall consider all factors it deems relevant, but must consider the following criteria:

1. the fairness of the cost-sharing method in light of at least the following factors:
  - relative state valuations, representing each member municipality's ability to raise revenue;
  - relative populations, representing each member municipality's board representation in the budgeting process; and
  - student headcounts, representing each member municipality's student usage of RSU facilities and programs;
2. the effect of the cost-sharing method on the RSU's ability to raise sufficient funds to sustain educational programs deemed to be in the best interests of RSU students;
3. clarity of the method, including ease with which the public can understand the method, ease of administration and implementation of the method, and avoidance of uncertainty over the method's application;
4. consistency of the method with the operation of the RSU as a single, cohesive entity;

5. effect of the method on stability of RSU revenue streams and local taxpayer obligations.

### **13-C. Election of initial board of directors.**

The RSU Board shall be composed of eleven (11) members. Each municipality in the RSU shall elect the following number of its residents to serve on the Board.

Municipality	Population	# of Board Members
Freeport	8,151	6
Durham	4,075	3
Pownal (M.S.A.D. No. 62)	1,596	2

Each Board member shall serve a 3-year term, except that the initial terms of the members of the first RSU Board shall be staggered. Since each municipality of the RSU has annual elections, lots will be drawn for the length of term specified as follows:

- A. Municipalities with annual elections. In municipalities with annual elections, 1/3 of the directors serve one-year terms, 1/3 of the directors serve 2-year terms and 1/3 of the directors serve 3-year terms. If the number of directors is not evenly divisible by 3, the first remaining director serves a 3-year term and the 2nd remaining director serves a 2-year term.

The directors shall serve their terms as determined at the organization meeting and an additional period until the next regional election of the municipalities. Thereafter, the directors' terms of office are as established in accordance with the provisions of Title 20-A Section 1471.

### **13-D. Tuition Contracts and Assignment of Tuition Students**

#### **1. Tuition Contracts**

The following SAUs offer some or all of their students limited tuition opportunities of which school to attend according to the following terms:

# ALM Cost-Sharing Factors

## Pros & Cons

Valuation	
<u>Pros</u>	<u>Cons</u>
Consistent with Statewide practice of allocating tax burden	Does not account for usage
Easily accessible	Does not necessarily correlate with income of residents
Indicative of ability to pay	

Pupil Count	
<u>Pros</u>	<u>Cons</u>
Driver of usage	Could create more drastic swings
Easily understood	Does not take into account efficiencies in overhead
Readily available	

Population	
<u>Pros</u>	<u>Cons</u>
Measure of voting power	Difficult to determine (only counted at 10-year census)
	Not a measure of usage
	Not a measure of ability to raise funds

Tax Increment Financing (TIFs)	
<u>Pros</u>	<u>Cons</u>
True value of each town	Not easily understood
	Not easily determined
	May not be an apples-to-apples comparison

Historical Spending	
<u>Pros</u>	<u>Cons</u>
Helped minimize spikes during RSU transition	No longer relevant after 10 years of RSU experience
	Static

Median Household Income	
<u>Pros</u>	<u>Cons</u>
Indicator of individual residents' ability to pay	Typically dated info
	Not indicative of full tax base (no commercial value)



# MAINE REVENUE SERVICES PROPERTY TAX DIVISION PROPERTY TAX BULLETIN NO. 1

Item #12  
Handout #5

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## MAINE STATE VALUATIONS

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REFERENCE: 36 M.R.S. §§ 208, 272, 305(1), 381, 683, and 692. 30-A M.R.S. § 5702.  
September 5, 2019; replaces June 16, 2015 revision

### 1. Overview

Maine law requires the State Tax Assessor to annually determine the equalized just value of all real and personal property in the state. These equalized values, known as state valuations, are compiled in a report which is certified with the Secretary of State by February 1 each year. The state valuations are used to calculate county taxes, to determine the amount of state funds to be granted to each municipality for education funding and revenue sharing, to establish municipal and school bond debt limits, and to determine municipal contributions to public school systems.

### 2. Definitions

- A. Arm's length sale. "Arm's length sale" means a sale between a willing buyer and a willing seller that are unrelated and are not acting under duress, abnormal pressure, or undue influence.
- B. Assessor. "Assessor" means a sworn municipal assessing authority, whether an individual assessor, a board of assessors, or a chief assessor of a primary assessing area. However, "Assessor" means the State Tax Assessor with respect to the unorganized territory.
- C. Just value. "Just value" of property means its fair market value.
- D. Municipal assessed value. "Municipal assessed value" means the total value of property in a municipality as recorded by that municipality. Municipal assessed value may be equal to, higher than, or lower than just value.
- E. State valuation. The "state valuation" for a given tax year means the total equalized value of all taxable property in a municipality as of April 1, plus the portion of exempt value of homestead exemptions and Business Equipment Tax Exemption property reimbursed by the State to the municipality, less the captured property value in tax increment financing districts in the municipality.

### 3. State Valuations

The State Tax Assessor determines state valuations annually, by analyzing municipal assessed values and adjusting those values, if necessary, to make them equal to just value. This is accomplished by completing sales ratio studies for each municipality, which measures the assessed value of recently sold properties relative to their selling price. In some instances, individual ratios will be determined for different classes of property within a municipality (e.g., waterfront, commercial, residential, etc.).

The ratios computed from the studies are applied to all similar classes of property within that municipality to determine a reliable estimation of the fair market value of all taxable properties in the municipality.

Data used in these studies are drawn from recent arm's length sales of property in the municipality, as reported by the municipality and on real estate transfer tax filings. Sales within a 12-month period surrounding the appropriate April 1 assessment date are reviewed. If there were insufficient arm's length sales during that sales period to conduct a reasonable analysis, the State Tax Assessor may expand the sales period reviewed to 18 months, 24 months, or beyond.

In addition to sales ratio studies, the State Tax Assessor may use additional information from other sources in determining state valuations, including, but not limited to, municipal valuation returns, meetings with assessors, and appraisals of individual properties. This additional information may be reviewed with the municipal assessor and compared with municipal assessed values to determine the ratio to just value on which the municipal assessments are based.

The State Tax Assessor produces a preliminary determination of state valuation, known as the Report of Assessment Review, which provides details of the data and the computations used in the determination of the state valuation. Municipal assessors should review these reports to ensure accuracy of the information and to identify any issues before the proposed state valuation is sent.

The proposed state valuation report is sent by October 1 each year to the chair of the board of assessors and, in municipalities having selectmen, to the chair of the board of selectmen. This report contains a list of the state valuations for each municipality in the county in which the municipality is located.

The state valuation report is then filed with the Secretary of State and published annually. This report includes state valuations for each of the organized municipalities in the state as well as the unorganized territory, which is grouped by county. Property in the Passamaquoddy Tribe and Penobscot Nation Indian Territories is also included in the state valuation report.

#### 4. Appeal Procedure

If a majority of the municipal officers disagree with the determinations in the proposed state valuation report, the municipality may appeal the State Tax Assessor's determination to the State Board of Property Tax Review (the "Board"). A municipality must file an appeal with the Board by November 15. An appeal must be in writing, must be signed by a majority of the municipal officers, and must include an affidavit stating the grounds for appeal. A copy of the appeal and affidavit must also be sent to the State Tax Assessor.

The Board is independent from the State Tax Assessor and consists of 15 members appointed by the governor. Appeals are heard and decided by a subset of five members of the Board.

The Board has the power to administer oaths, take testimony, hold hearings, summon such witnesses and subpoena such records, files, and documents it deems necessary. The Board's current rules and procedures may be found at [www.maine.gov/dafs/boardproptax/](http://www.maine.gov/dafs/boardproptax/).

The Board must hear an appeal within a reasonable amount of time and must render its decision no later than January 15 following the date of the appeal. Prior to a hearing, the Board will give at least five days' notice to the municipality and the State Tax Assessor. If it rules in favor of a municipality, the Board may adjust the state valuation for that municipality. The State Tax Assessor must

incorporate any adjustment into the state valuation report certified to the Secretary of State pursuant to 36 M.R.S. § 305(1).

Decisions of the Board may be appealed pursuant to the Maine Administrative Procedures Act, Title 5, chapter 375. If an appeal to the Superior Court or Supreme Judicial Court results in a lowering of the municipality's state valuation, the State will reimburse an amount equal to the money lost by the municipality due to the use by the State of an incorrect value used to distribute state funds to municipalities.

NOTE: This bulletin is intended solely as advice to assist persons in determining, exercising or complying with their legal rights, duties or privileges. If further information is needed, contact the Property Tax Division of Maine Revenue Services.

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(Published under Appropriation No. 1037.1)



Item #12.  
Handout #6

# RSU5 2019-2020 BOARD OF DIRECTORS' ADOPTED BUDGET IMPACT

	Assessed 2018-2019	Proposed 2019-2020	Difference	
<b>RSU Operating Budget</b>				
Total Operating Budget	\$ 32,946,024	\$ 34,080,295	\$ 1,134,271	
Adult Education Budget	\$ 112,000	\$ 112,000	\$ -	
<b>Total RSU Operating Budget w/Adult Ed</b>	<b>\$ 33,058,024</b>	<b>\$ 34,192,295</b>	<b>\$ 1,134,271</b>	<b>3.43%</b>

## **Less: State and Non-Shared Debt**

F-Non-Shared Local Debt	\$ 162,486	\$ 155,264	\$ (7,222)	
D- State Supported Debt	\$ 1,292,035	\$ 1,270,507	\$ (21,528)	
D-Non-Shared Local Debt	\$ 198,901	\$ 155,985	\$ (42,916)	
<b>Total State and Non-Shared Debt</b>	<b>\$ 1,653,422</b>	<b>\$ 1,581,756</b>	<b>\$ (71,666)</b>	

ED 279 Section 6

## **Less: Local Revenues**

Shared Revenue*	\$ 976,136	\$ 805,500	\$ (170,636)	
State Aid	\$ 4,659,591	\$ 4,966,862	\$ 307,271	
<b>Total Revenues</b>	<b>\$ 5,635,727</b>	<b>\$ 5,772,362</b>	<b>\$ 136,635</b>	

<b>Less: RSU Plan Required Local Contribution</b>	<b>\$ 17,771,646</b>	<b>\$ 17,707,332</b>	<b>\$ (64,314)</b>	
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ED 279 Section 4B

<b>Total Additional Local Monies Required*</b>	<b>\$ 7,997,229</b>	<b>\$ 9,130,844</b>	<b>\$ 1,133,615</b>	
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<b>Net Impact to Taxation Districtwide</b>	<b>\$ 25,768,875</b>	<b>\$ 26,838,176</b>	<b>\$ 1,069,301</b>	<b>4.15%</b>
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## **Additional Local Monies Required Distribution Per RSU Plan**

Durham 21.42%	\$ 1,713,007	\$ 1,955,827	\$ 242,820	
Freeport 65.98%	\$ 5,276,572	\$ 6,024,531	\$ 747,959	
Pownal 12.60%	\$ 1,007,651	\$ 1,150,486	\$ 142,835	
<b>Total Additional Local Monies Required</b>	<b>\$ 7,997,229</b>	<b>\$ 9,130,844</b>	<b>\$ 1,133,615</b>	

## **\*Shared Revenue**

Town of Freeport Hunter Road Field Maintenance	\$95,000
State Agency	\$40,000
Medicaid	\$50,000
Misc / Interest	\$19,000
Laugh & Learn	\$5,500
Contingency	\$196,000
Undesignated Fund Balance	\$400,000
<b>Total Shared Revenue</b>	<b>\$805,500</b>

# **RSU5 2019-2020 BOARD OF DIRECTORS' ADOPTED BUDGET IMPACT**

		Assessed 2018-2019	Proposed 2019-2020	Difference
<b><u>Additional Local Monies Required Distribution Per RSU Plan</u></b>				
Durham	21.42%	\$ 1,713,007	\$ 1,955,827	\$ 242,820
Freeport	65.98%	\$ 5,276,572	\$ 6,024,531	\$ 747,959
Pownal	12.60%	\$ 1,007,651	\$ 1,150,486	\$ 142,835
<b>Total Additional Local Monies Required</b>		<b>\$ 7,997,229</b>	<b>\$ 9,130,844</b>	<b>\$ 1,133,615</b>

## **Durham**

RSU Plan Additional Local Monies	\$	1,713,007	\$	1,955,827	\$	242,820
RSU Plan Required Local Contribution	\$	3,106,150	\$	3,113,280	\$	7,130
Non Shared Debt	\$	198,901	\$	155,985	\$	(42,916)
<b>Net Impact</b>	<b>\$</b>	<b>5,018,058</b>	<b>\$</b>	<b>5,225,092</b>	<b>\$</b>	<b>207,034</b>

Estimated Impact based on 2018 Mil of \$19.70 and a taxable valuation of \$351,407,600\* \$0.59 2.99%

## **Freeport**

RSU Plan Additional Local Monies	\$	5,276,572	\$	6,024,531	\$	747,959
RSU Plan Required Local Contribution	\$	12,694,793	\$	12,639,144	\$	(55,648)
Non Shared Debt	\$	162,486	\$	155,264	\$	(7,222)
<b>Net Impact</b>	<b>\$</b>	<b>18,133,850</b>	<b>\$</b>	<b>18,818,939</b>	<b>\$</b>	<b>685,089</b>

Estimated Impact based on 2018 Mil of \$15.05 and a taxable valuation of \$1,699,276,850\* \$0.40 2.68%

## **Pownal**

RSU Plan Additional Local Monies	\$	1,007,651	\$	1,150,486	\$	142,835
RSU Plan Required Local Contribution	\$	1,970,703	\$	1,954,908	\$	(15,795)
Non Shared Debt	\$	-	\$	-	\$	-
<b>Net Impact</b>	<b>\$</b>	<b>2,978,354</b>	<b>\$</b>	<b>3,105,394</b>	<b>\$</b>	<b>127,040</b>

Estimated Impact based on 2018 Mil of \$18.00 and a taxable valuation of \$246,848,680\* \$0.51 2.86%

\*April 1, 2019 valuations and mil rates are not known at this time. Actual impact will be determined when taxes are committed in each town.

FD 279 Section 4B

Item #12  
Handout #7

ED 279

STATE OF MAINE DEPARTMENT OF EDUCATION  
AUGUSTA 04333

2/15/2019

STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT

ORG ID : 1449

RSU 05

2019 - 2020

Section : 1

Section 1: Computation of EPS Rates

A) Attending Counts:

	PreK-K		1-5	6-8		PreK-8	9-12	Total
1) Attending Pupils (October 2017)	223.0	+	695.0	490.0	=	1,408.0	534.0	1,942.0
2) Attending Pupils (October 2018)	246.0	+	695.0	470.0	=	1,411.0	582.0	1,993.0
3) Attending Pupils Average	234.5	+	695.0	480.0	=	1,409.5	558.0	1,967.5
						72 %	28 %	100 %

B) Staff Positions	Pre-K-K EPS FTE	Student to Staff	+	1-5 EPS FTE	Student to Staff	+	6-8 EPS FTE	Student to Staff	+	9-12 EPS FTE	Student to Staff	=	EPS FTE Total	Actual FTE Total	=	% Of EPS	x	SAU Data In EPS Matrix	=	Adjusted EPS Salary	=	Elementary Salary	Secondary Salary
1) Teachers	15.6	(15:1)	+	40.9	(17:1)	+	28.2	(17:1)	+	34.9	(16:1)	=	119.6	146.0	=	0.82	x	7,701,848	=	6,315,515	=	4,521,909	1,793,606
2) Guidance	0.7	(350:1)	+	2.0	(350:1)	+	1.4	(350:1)	+	2.2	(250:1)	=	6.3	9.4	=	0.67	x	484,172	=	324,395	=	232,267	92,128
3) Librarians	0.3	(800:1)	+	0.9	(800:1)	+	0.6	(800:1)	+	0.7	(800:1)	=	2.5	4.9	=	0.51	x	260,759	=	132,987	=	95,219	37,768
4) Health	0.3	(800:1)	+	0.9	(800:1)	+	0.6	(800:1)	+	0.7	(800:1)	=	2.5	4.7	=	0.53	x	275,132	=	145,820	=	104,407	41,413
5) Education Techs	2.1	(114:1)	+	6.1	(114:1)	+	1.5	(312:1)	+	1.8	(316:1)	=	11.5	18.2	=	0.63	x	363,272	=	228,861	=	163,864	64,997
6) Library Techs	0.5	(500:1)	+	1.4	(500:1)	+	1.0	(500:1)	+	1.1	(500:1)	=	4.0	2.0	=	2.00	x	44,737	=	89,474	=	64,063	25,411
7) Clerical	1.2	(200:1)	+	3.5	(200:1)	+	2.4	(200:1)	+	2.8	(200:1)	=	9.9	12.0	=	0.83	x	405,986	=	336,968	=	241,269	95,699
8) School Admin.	0.8	(305:1)	+	2.3	(305:1)	+	1.6	(305:1)	+	1.8	(315:1)	=	6.5	8.8	=	0.74	x	746,845	=	552,665	=	395,708	156,957

C) Computation of Benefits:

	Percentage		Elementary Salary	Secondary Salary		Elementary Benefits	Secondary Benefits
1) Teachers, Guidance, Librarians & Health	19.00%	X	4,953,802	1,964,915	=	941,222	373,334
2) Education & Library Technicians	36.00%	X	227,927	90,408	=	82,054	32,547
3) Clerical	29.00%	X	241,269	95,699	=	69,968	27,753
4) School Administrators	14.00%	X	395,708	156,957	=	55,399	21,974

D) Other Support Per-Pupil Costs:

	PreK-8	9-12		Elementary Students	Secondary Students		Elementary Support	Secondary Support
1) Substitute Teachers (1/2 Day)	44	44	X	1,409.5	558.0	=	62,018	24,552
2) Supplies and Equipment	384	530	X	1,409.5	558.0	=	541,248	295,740
3) Professional Development	66	66	X	1,409.5	558.0	=	93,027	36,828
4) Instructional Leadership Support	30	30	X	1,409.5	558.0	=	42,285	16,740
5) Co- and Extra-Curricular Student	41	127	X	1,409.5	558.0	=	57,790	70,866
6) System Administration/Support	47	47	X	1,409.5	558.0	=	66,247	26,226
7) Operations & Maintenance	1122	1333	X	1,409.5	558.0	=	1,581,459	743,814

E) Other Adjustments:

1) Regional Adjustment for Staff & Substitute Salaries	Regional Index =	1.08		470,458	186,602
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Section 1: Totals

Divided by Attending Pupils:	+	1,409.5	558.0
Calculated EPS Rates Per Pupil:	=	7,011	7,464

Preliminary Not Yet Enacted – Adjustments will be made to these printouts throughout FY 20

**STATE OF MAINE DEPARTMENT OF EDUCATION  
AUGUSTA 04333**

**STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT**

ORG ID : 1449

RSU 05

2019 - 2020

## Section 2: Operating Cost Allocations

Section : 2

A) Subsidizable Pupils ( Includes Superintendent Transfers )			4YO/PreK	K-8	9-12	Total		
1)	October 2017		95.0 +	1,315.0 +	531.0 =	1,941.0		
2)	October 2018 (may include 4YO/PreK estimates)		95.0 +	1,317.0 +	579.0 =	1,991.0		
3)	Subsidizable Pupils Average		95.0 +	1,316.0 +	555.0 =	1,966.0		
			SAU EPS Rates from					Basic Cost Allocations
B) Basic Counts			Average Pupils		Page 1			
1)	4YO/PreK Pupils	(Most Recent Oct Only)	95.0		X	7,011 =	666,045.00	
2)	K-8 Pupils		1,316.0		X	7,011 =	9,226,476.00	
3)	9-12 Pupils		555.0		X	7,464 =	4,142,520.00	
4)	Adult Education Courses at .1		1.9		X	7,464 =	14,181.60	
5)	4YO/PreK Equiv. Instruction Pupils	(Most Recent Oct Only)	0.000		X	7,011 =	0.00	
6)	K-8 Equiv. Instruction Pupils		0.750		X	7,011 =	5,258.25	
7)	9-12 Equiv. Instruction Pupils		1.500		X	7,464 =	11,196.00	
C) Weighted Counts					SAU EPS Rates from		Weighted Cost Allocations	
			Pupils	EPS Weights	Page 1			
1)	4YO/PreK Disadvantaged @	0.2167	20.6 X	0.15	X	7,011 =	21,663.99	
2)	K-8 Disadvantaged @	0.2167	285.2 X	0.15	X	7,011 =	299,930.58	
3)	9-12 Disadvantaged @	0.2167	120.3 X	0.15	X	7,464 =	134,687.88	
4)	4YO/PreK English Learners		0.0 X	0.500	X	7,011 =	0.00	
5)	K-8 English Learners		10.0 X	0.500	X	7,011 =	35,055.00	
6)	9-12 English Learners		10.0 X	0.500	X	7,464 =	37,320.00	
					EPS Targeted Amount		Targeted Cost Allocations	
D) Targeted Funds			Pupils	EPS Weights				
1)	4YO/PreK Student Assessment	(Most Recent Oct Only)	95.0		X	50.00 =	4,750.00	
2)	K-8 Student Assessment		1,316.0		X	50.00 =	65,800.00	
3)	9-12 Student Assessment		555.0		X	50.00 =	27,750.00	
4)	4YO/PreK Technology Resources	(Most Recent Oct Only)	95.0		X	109.00 =	10,355.00	
5)	PreK-8 Technology Resources		1,316.0		X	109.00 =	143,444.00	
6)	9-12 Technology Resources		555.0		X	327.00 =	181,485.00	
7)	4YO/PreK Pupils	(Most Recent Oct Only)	95.0 X	0.10	X	7,011 =	66,604.50	
8)	K-2 Pupils		396.0 X	0.10	X	7,011 =	277,635.60	
9)	4YO/PreK Disadvantaged Targeted	(Most Recent Oct Only)	20.6 X	0.05	X	7,011 =	7,221.33	
10)	K-8 Disadvantaged Targeted		285.2 X	0.05	X	7,011 =	99,976.86	
11)	9-12 Disadvantaged Targeted		120.3 X	0.05	X	7,464 =	44,895.96	
E) Isolated Small School Adjustment								
1)	PreK-8 Isolated Small School Adjustment							0.00
2)	9-12 Isolated Small School Adjustment							0.00
Section 2: Operating Allocation Totals							15,524,252.55	

Preliminary Not Yet Enacted -- Adjustments will be made to these printouts throughout FY 20

## STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT

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## Section 3: Other Allocations

## Section : 3

## A) Other Subsidizable Costs

		Base Year Expenditure		Inflation Adjustment		
1)	Gifted & Talented Expenditures from 2017 - 2018	78,208.01	X	101.70%	=	79,537.55
2)	Special Education - EPS Allocation		X		=	3,820,535.84
3)	Special Education - High-Cost Out-of-District Allocation		X		=	40,549.00
4)	Transportation Operating - EPS Allocation		X		=	1,212,104.00
5)	Approved Bus Allocation (Purchase Year FY 19 or earlier)		X		=	240,462.69
	Total Other Subsidizable Costs				=	5,393,189.08

## B) Teacher Retirement Amount (Normalized Cost)

645,441.18

Total Adjusted Operating Allocation (Page 2 ) plus Total other Subsidizable Costs plus Teacher Retirement = 21,562,882.81

## C) Debt Service Allocations

1)	Town / District	Payment Date	Name of Project	Principal		Interest		Total
	DURHAM	11/01/2019	DURHAM NEW PREK-8 SCHOOL	886,467.00	+	196,618.38	=	1,083,085.38
		05/01/2020	DURHAM NEW PREK-8 SCHOOL	0.00	+	187,421.29	=	187,421.29
2)	Total Debt Service Principal & Interest Payments			886,467.00		384,039.67		1,270,506.67
3)	Approved Lease for 2018 - 19		RSU 05					0.00
4)	Approved Lease Purchase for 2018 - 19 for		RSU 05					0.00
	Total Debt Service Allocation						=	1,270,506.67

Section 3 : Total Combined Allocations (Page 2 Adjusted Total plus Other Subsidizable plus Debt Service)

22,833,389.48

Preliminary Not Yet Enacted – Adjustments will be made to these printouts throughout FY 20

## STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT

ORG ID : 1449

RSU 05

2019 - 2020

## Section : 4

## Section 4 : Calculation of Required Local Contribution - MII Expectation

## A) Subsidizable Pupils (Excludes Superintendent Transfers for SADs, RSUs &amp; CSDs) by Member Municipality

Member Municipality	Average Subsidizable Pupils	Percentage of Total Pupils	Oper., Othr Sub, & Tch. Ret. Allocation Distribution	Municipal Debt Allocation Distribution	Total Municipal Allocation Distribution as a Percentage of Pupils
Durham	599.5	30.73%	6,625,273.89 +	1,270,506.67 =	7,896,780.56
Freeport	1140.0	58.43%	12,599,192.43 +	0.00 =	12,599,192.43
Pownal	211.5	10.84%	2,337,416.49 +	0.00 =	2,337,416.49
<b>Total</b>	<b>1,951.0</b>	<b>100.00%</b>	<b>21,562,882.81</b>	<b>1,270,506.67</b>	<b>22,833,389.48</b>

## B) State Valuation by Member Municipality

Member Municipality	3-Yr Average or Previous Yr State Valuation	MI Expectation	Total Municipal Allocation Distribution per Valuation x MI Expectation
Durham	376,000,000	8.28	3,113,280.00
Freeport	1,526,466,667	8.28	12,639,144.00
Pownal	236,100,000	8.28	1,954,908.00
<b>Total</b>	<b>2,138,566,667</b>		<b>17,707,332.00</b>

## C) Required Local Contribution = the lesser of the previous two calculations :

Member Municipality	Total Allocation by Municipality	Required Local Contribution by Municipality	Calculated MI Rate	State Contribution by Municipality (Prior to adjustments)
Durham	7,896,780.56 -	3,113,280.00	8.28	4,783,500.56
Freeport	12,599,192.43 -	12,599,192.43	8.25	0.00
Pownal	2,337,416.49 -	1,954,908.00	8.28	382,508.49
<b>Total</b>	<b>22,833,389.48</b>	<b>17,667,380.43</b>		<b>5,166,008.05</b>

Preliminary Not Yet Enacted – Adjustments will be made to these printouts throughout FY 20



## STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT

ORG ID : 1449

RSU 05

2019 - 2020

## Section : 5

## Section 5: Totals and Adjustments

	Total Allocation	Local Contribution	State Contribution
A) Total Allocation, Local Contribution, and State Contribution Prior to Adjustment	22,833,389.48	17,667,380.43	5,166,009.05
4) Minimum Special Education Adj. for Towns in a RSU		-1,015,214.00	1,015,214.00
6) Totals after adjustment to Local and State Contributions	22,833,389.48	16,652,166.43	6,181,223.05
B) Other Adjustments to State Contribution Only			
1) Plus Audit Adjustments			0.00
2) Less Audit Adjustments			0.00
3) Less Adjustment for Unappropriated Local Contribution			0.00
4) Less Adjustment for Unallocated Balance in Excess of 3%			0.00
5) Special Education Budgetary Hardship Adjustment			0.00
6) Career & Technical Education Center Allocation			0.00
7) Plus Long-Term Drug Treatment Centers Adjustment			0.00
8) Regionalization and efficiency assistance			56,146.20
9) Bus Refurbishing Adjustment			0.00
10) Less MaineCare Seed - Private			0.00
11) Less MaineCare Seed - Public			0.00
C) Adjusted State Contribution			6,237,369.25
Local and State Percentages Prior to Adjustments :	Local Share % = 77.38 %	State Share % = 22.62 %	
Local and State Percentages After Adjustments :	Local Share % = 72.93 %	State Share % = 27.07 %	
FY1 : 100% EPS Allocation	22,833,389.48		

## Section F: Adjusted Local Contribution by Town

## \*\*\*\*\* WARRANT ARTICLE \*\*\*\*\*

Member Municipality	Min. Spec. Ed. RSU Towns Adj. Sec.5 Line A4	Total Allocation	Adjusted Local Contribution	Adjusted Percentage	Adjusted Mill Rate
Durham	0.00	7,896,780.56	3,113,280.00	18.70%	8.28
Freeport	1,015,214.00	12,589,192.43	11,583,978.43	69.56%	7.59
Pownal	0.00	2,337,416.49	1,954,908.00	11.74%	8.28
Totals	1,015,214.00	22,833,389.48	16,652,166.43	100.00%	

Preliminary Not Yet Enacted – Adjustments will be made to these printouts throughout FY 20

## STATE CALCULATION FOR FUNDING PUBLIC EDUCATION (PreK-12) REPORT

ORG ID : 1449

RSU 05

2019 - 2020

Section : 6

## Section 6: SCHEDULED PAYMENTS &amp; YEAR TO DATE PAYMENTS

MONTH	SUBSIDY	PAID TO DATE	DEBT SERVICE	PAID TO DATE
July	413,905.22	0.00	0.00	0.00
August	413,905.22	0.00	0.00	0.00
September	413,905.22	0.00	0.00	0.00
October	413,905.22	0.00	0.00	0.00
November	413,905.22	0.00	1,083,085.38	0.00
December	413,905.22	0.00	0.00	0.00
January	413,905.22	0.00	0.00	0.00
February	413,905.22	0.00	0.00	0.00
March	413,905.22	0.00	0.00	0.00
April	413,905.22	0.00	0.00	0.00
May	413,905.22	0.00	187,421.29	0.00
June	413,905.16	0.00	0.00	0.00
<b>TOTAL</b>	<b>4,966,862.58</b>	<b>0.00</b>	<b>1,270,506.67</b>	<b>0.00</b>

Preliminary Not Yet Enacted – Adjustments will be made to these printouts throughout FY 20