

Washington Central Supervisory Union

2014 Efficiency Study

Phase I

Commissioned by the WCSU Executive Committee

&

Presented to the WCSU Full Board: December 3, 2014

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TABLE OF CONTENTS

Table of Contents	i
Context	ii
The Case for Increased Efficiency	1
Historical Notes	4
Findings	6
Theme I: Governance and Board Structures	8
Theme II: Operations	17
Business Operations	17
Centralized Services	19
Collective Bargaining	22
Human Resources	23
Professional Development & Curriculum Development ..	25
Special Education	26
Technology	27
Theme III: Structural Opportunities	29
Appendices	
A. Sample Principal Report Template	32
B. List of Reviewed Documents	33
Tables	
Table 1. WCSU Member Towns' Changes in ADM.	1
Table 2. NESDEC: Recent Historical Enrollment for WCSU by Grade Groupings.....	2
Table 3. NESDEC: Projected Enrollment for WCSU, SY'14- SY'24.	2
Table 4. NESDEC: 20-Year Enrollment Trend.	3
Table 5. WCSU Elementary K-6 Classroom Utilization.	30

CONTEXT

Overview

The purpose of this study is to offer an inventory of proposed efficiencies, noted as “opportunities” within Washington Central Supervisory Union (WCSU) and its member school districts. For future clarity, this report is framed as “Phase I.” Specific expertise will be provided as part of Phase II to develop a cost analysis of selected opportunities identified in this Phase I study.

The underlying spirit of the report is that of objectivity. The review offers an array of opportunities, some of which may be regarded as “low hanging fruit” and others that may require time and effort to actualize. Other findings may spark further dialogue. The study can serve as a planning tool as WCSU considers its desired future conditions. The opportunities noted in this report are best viewed through the lens of how best to jointly serve the needs of WCSU’s students and taxpayers.

Definition and Scope

Efficiency is defined (in part) as *“the accomplishment of or ability to accomplish a job with a minimum expenditure of time and effort.”*¹ Therefore, this study considers both quantitative measures (time, money, and other “hard” resources) and qualitative measures (effort, labor, and other “soft” resources). This study does not capture elements of *effectiveness*, as such is not only a separate construct, but also more properly the purview of the board and superintendent.

This study focuses attention at the organizational, operational and governance levels. It does not focus attention at the project level, although a review of the interplay between the enterprise and organizational levels does surface during the study, and are noted herein.

Limitations

The study was undertaken on a part-time basis over a seven-week period during the fall of 2014. The results are therefore limited to findings during that period. In addition, the reviewer is neither an employee nor a resident of WCSU, so there may be history or conditions that were not thoroughly understood by the reviewer.

¹ Random House Dictionary, 2014.

² Secretary Rebecca Holcombe, PowerPoint presentation slide presented to the Vermont School Boards

Approach to the Study

Three traditional approaches informed the study. They were:

- a) A review of records, artifacts, data, and associated documents. Included was information gleaned from the WCSU and its member districts' web sites. A list of documents reviewed is found in Appendix B.
- b) Interviews with some stakeholders. The reviewer met with:
 - i. All school building administrators (Leadership Team) independent of the WCSU administrators;
 - ii. WCSU personnel, and
 - iii. The superintendent on multiple occasions.
- c) Independent observations.

Cooperation

The reviewer acknowledges the WCSU Executive Committee's foresight to ask the important and timely question: "How can we improve our students' learning by finding further efficiency in our supervisory union?"

The reviewer extends his gratitude to Superintendent Kimball and the WCSU staff. He and they were not only accessible, but each promptly and completely supplied information as needed. The reviewer further encountered a routine spirit of openness and interest in the project among all interviewees. The breadth of the study's results is indicative of the support, ideas and information they provided during the study.

The Reviewer

Dr. Michael R. Deweese, now retired, was a career-long Vermont educator with experience across three of the state's supervisory unions. He taught in two supervisory unions. He thereafter served as a principal in two supervisory unions. For his final twenty-four years as an educator, he was an Assistant Superintendent and Superintendent in two supervisory unions (one rural and one suburban, each spanning PreK-12/technical education).

THE CASE FOR INCREASED EFFICIENCY

There is no imminent crisis across WCSU that needs to be immediately addressed. However, WCSU is aware of the rising chorus of concern over the sustainability of our state's current educational system. The Governor, legislature, and news media are steadily reinforcing what Vermonters know and feel. This includes:

- increasing costs per pupil,
- heightened public expectations of schools' outcomes,
- the need for our students to be competitive in a global economy,
- school staffing patterns that have not significantly changed despite a +/- 20% drop in statewide enrollment in recent years,
- a state education financing system that continues to be strained, and
- citizens' annually challenged to afford school budgets.

All are combining in an unpleasant "perfect storm." And increasingly, modern schools are often being run in archaic fashions.

The origins of this study are not reflexive; rather, they stem from the Executive Committee's earnest interest in WCSU's continuous improvement as it creates the best possible educational experiences for the children of its school community. In doing so, the organization's leaders are commended for pausing to also consider its current and future conditions, and how best to address the "sustainability factor" for its taxpayers. The overarching challenge of *affordable educational excellence*, now and into the future, spawned this review.

Enrollment Factors. The enrollment conditions of WCSU's member communities generally follow the state's overall trends. With average daily membership (ADM) as the factor, the Vermont Secretary of Education recently reported the following data² for the state. For both time intervals (past twenty years and past five years), ADM in each of WCSU's five member towns has decreased.

Table 1. WCSU Member Towns' Changes in ADM.

Town	Past 20 Years	Past 5 Years
Berlin	- 21.1%	- 3.2%
Calais	- 34.2%	- 7.8%
East Montpelier	- 14.3%	- 14.7%
Middlesex	- 15.2%	- 4.2%
Worcester	- 41.9%	- 16.4%

² Secretary Rebecca Holcombe, PowerPoint presentation slide presented to the Vermont School Boards Association at its Fall, 2004 conference. Slide no. 8. Presentation date reference: October 23, 2014.

The New England School Development Council, in its 2013-14 WCSU demographic report³, profiled the recent history of enrollment in various grade clusters.

Table 2. NESDEC: Recent Historical Enrollment for WCSU by Grade Groupings.

Historical Enrollment in Grade Combinations									
Year	K-4	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2003-04	518	642	754	1081	543	419	307	857	550
2004-05	509	633	781	1046	537	413	285	876	591
2005-06	477	583	698	965	488	382	267	862	595
2006-07	505	607	714	985	480	378	271	848	577
2007-08	518	626	731	970	452	344	239	830	591
2008-09	528	645	764	995	467	350	231	795	564
2009-10	514	626	743	980	466	354	237	752	515
2010-11	517	631	743	992	475	361	249	753	504
2011-12	515	615	739	981	466	366	242	727	485
2012-13	519	628	726	968	449	340	242	704	462
2013-14	498	608	716	952	454	344	236	709	473

Looking ahead, NESDEC also supplied its projected⁴ enrollment patterns over the next decade. Its confidence band is predictably higher for the first five years. The chart's asterisk illustrates grade 7-12 values are *inclusive* of anticipated tuition students from outside WCSU, which skew the internal WCSU member towns' enrolled student values.

Table 3. NESDEC: Projected Enrollment for WCSU, SY'14-SY'24.

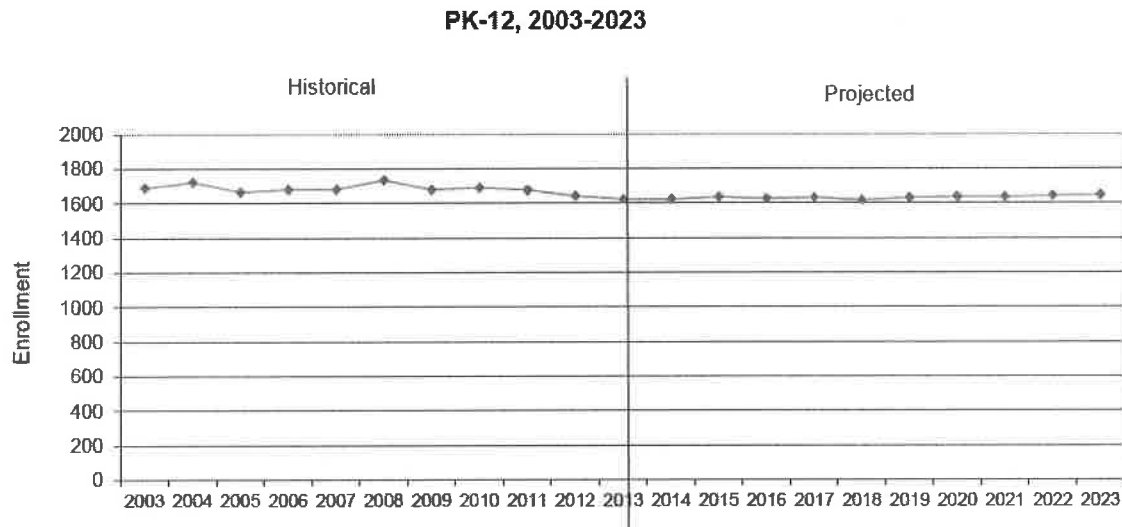
Projected Enrollment in Grade Combinations*									
Year	K-4	K-5	K-6	K-8	5-8	6-8	7-8	7-12	9-12
2013-14	498	608	716	962	464	354	246	804	558
2014-15	498	604	717	947	449	343	230	801	571
2015-16	504	612	720	962	458	350	242	809	567
2016-17	515	613	722	964	449	351	242	794	552
2017-18	526	624	723	961	435	337	238	797	559
2018-19	531	634	734	962	431	328	228	769	541
2019-20	536	640	745	963	427	323	218	768	550
2020-21	530	647	753	977	447	330	224	764	540
2021-22	532	640	760	990	458	350	230	753	523
2022-23	530	642	752	999	469	357	247	765	518
2023-24	531	639	753	1005	474	366	252	765	513

³ NESDEC: WCSU Enrollment Report (2013-14). Revised report: April 22, 2014. Donald Kennedy; Marlborough, MA.

⁴ Ibid.

Shown graphically, the NESDEC projections⁵ reflect a relatively flattened enrollment over the ensuing decade for WCSU. However, these numbers do not reach the higher number of enrolled students from the 1990's.

Table 4. NESDEC: 20-Year Enrollment Trend.



Spending. A brief examination of WCSU school spending⁶ is instructive. In FY'13, WCSU's expenditure per student in membership was \$16,972 (modestly above the state average of \$16,773). In FY'03, WCSU's expenditure per student in membership was \$10,264 (modestly below the state average of \$10,415). During the decade from FY'03-FY'13, WCSU's increase in its expenditure per student in membership was 65.4%, as contrasted with the state average over the period of 61.0%. As such, while WCSU's expenditures per student in membership are within the state's norms, the state's norms are widely held to be unsustainable.

In short, WCSU's plight mirrors that of Vermont. As enrollment has dropped (but beginning to level out), expenditures have continued to grow. An examination of WCSU's possible efficiencies is a prudent activity.

HISTORICAL NOTES

⁵ Ibid.

⁶ Vermont Agency of Education: Summary of the Annual Statistical Report of Schools (SASRS): Data & Reports for FY'03 and FY'13. <http://education.vermont.gov/data/annual-statistical-reports-of-schools>. Retrieved November 21, 2014

Vermont's supervisory union structure predates the turn of the *last* century. Its origins date back to the 1890's, when the Vermont General Assembly required that individual schoolhouses (each town often had multiple schoolhouses, often of the one or two room variety) could no longer be individual school districts, but instead towns needed to become the basic units for school governance. The effect of this 1892 law saw a reduction from about 2,500 school districts to approximately 300 (quite similar to the current number across Vermont).

As the state's movement toward the professionalization of education began, towns were invited to pool resources and jointly hire a "supervisory union" superintendent.⁷ Only a few did. In the early years of the twentieth century, the towns now comprising WCSU each had its own "town superintendent;" and as viewed by the state none was a professional educator.⁸

The Carnegie Commission's 1914 report⁹ implored the state to take a more active role in the oversight of education. Among its many recommendations was the establishment of state-based supervisory unions, each with a professional superintendent responsible for overseeing a contiguous region of the state (identified as a minimum critical mass of approximately fifty teachers).

Communities' pushback over state-employed superintendents resulted in the General Assembly mandating the reestablishment of supervisory unions in 1935. Thereafter, the employment of professional superintendents had shifted to the supervisory union level across the state.

A score of studies¹⁰ since have unsuccessfully sought to modernize or abolish Vermont's supervisory union structure. With the general exception of some supervisory union boundary adjustments occurring over time, the general structure of the state's supervisory union structure remains unchanged for the past eight decades.

⁷ Cyprian, David. "A Brief History of Education in Vermont." Produced in cooperation with the Vermont School Boards Association, Vermont Superintendents Association, and Vermont Principals Association (Montpelier, Vermont). 2012.

⁸ Huden, John Charles. The Development of State School Administration in Vermont. Vermont Historical Society, Montpelier, VT. 1944.

⁹ Bulletin of the Carnegie Foundation for the Advancement of Teaching: Issues 7-8. "Commission to Investigate the Educational System and Conditions of Vermont, 1914." Published by the Carnegie Foundation.

¹⁰ Richardson, Bruce A. *Education Governance Studies in Vermont: The Search for the Ever-Elusive Silver Bullet of School Reform*. Doctoral Dissertation, University of Vermont. 1994.

Past WCSU studies. Other recent studies specific to WCSU include:

- “External Review of Management/Leadership Services,” (working draft October, 2006: R. Proulx and L. Soares). Four primary recommendations emerged:
 - A need for boards across WCSU to determine whether the WCSU central office should be a business hub or a center of leadership.
 - A need for consistency among administrators and board members in understanding, agreeing, upholding, and protecting the Vision, Mission, and Bylaws.
 - A need for board members and administrators to operate with clarity within their distinct governance and administrative functions and responsibilities.
 - A need for increased cross-training of key personnel.
- “Phase I Governance Study,” (2010: R. Proulx). This report examined options for Rumney Memorial and Doty Memorial Schools. The report provided base-line data and explored options for the school districts’ considerations related to the future school structures for its children.
- “Special Education Task Force Report,” (2011: A. Angney, et al). This report summarized special education conditions across WCSU in light of (then) recent legislation under Act 153, which required the provision of special education and related services at the SU level unless the SU could demonstrate through a waiver request that it otherwise could be more effectively and efficiently delivered. The report did not find that a waiver request was warranted, and that compliance with centralizing special education services was appropriate for WCSU.

FINDINGS

The historical roots of Vermont's supervisory union and its present day role inform this study. Specifically, Washington Central Supervisory Union (WCSU) is comprised of its six member districts:

- Berlin
- Calais
- East Montpelier
- Middlesex
- Worcester
- UHSD #32.

The five towns are all located in Washington County. The five member communities are all proximate to the county's shire town and population center, Montpelier. Youth activities occur between and among the towns. Respondents felt there were far more similarities than differences among the towns. The town's five school districts are the members of UHSD #32; the UHSD #32 community of towns is the WCSU community of towns. In short, given the existence of supervisory unions, there is ample supporting logic for the composition of WCSU.

That said, with a focus on efficiency, supervisory unions by definition are not *necessarily* efficient. Supervisory unions in the absence of an intentional design can be redundant and inefficient; conversely, though a planned approach, supervisory unions can be centers of efficiency in leadership and service to all students and taxpayers of the member districts.

WCSU is comprised of six school districts. The five town school district boards each have five members, and the UHSD#32 board has seven members. Together, thirty-two board members serve the students and communities of WCSU. Throughout this document, the term WCSU is generally inclusive of WCSU and local districts unless otherwise noted.

Under Vermont law, the WCSU supervisory union board (referred internally as the WCSU "Full Board") is comprised of three members from each of the six districts. Accordingly, just over half of the local board members concurrently serve on the SU board. Responsibilities of supervisory union boards are detailed in 16 V.S.A. §261a, ("duties of supervisory union board").

Under the supervisory union's by-laws, the SU Executive Committee seats one board member from each of the six local boards. These six members, per the by-laws, while selected from each board, are not required to concurrently serve on the WCSU Full Board.

The objectives of the WCSU Bylaws set out in Article II set an important governance framework. Among the objectives is Section 2.40:

2.40 Enable the WCSU and its member communities to take advantage of such economic and administrative efficiencies as will maintain and promote the well being of students in the district.

The well being of all students in the district (SU) is central to the work of the entire supervisory union's governance work, including all board members (and administrators). Important changes to Vermont law now reinforces the expectation of centralized (board and administrative) leadership and services within supervisory unions

Yet, the WCSU boards' methods of organizing themselves under the Bylaws do not fully align with its own Objective or current law. Given "efficiency" as this study's purpose, readers should filter the following list of opportunities through a series questions, including:

- Are WCSU students and taxpayers better served if we pull together on this topic?
- Do differences in practices pose a conflict with interests of equal opportunity for learners?
- Why have we done things this way?
- What bias might I have about this topic?
- To what extent are differences in our practices on this topic acceptable?
- How seamless do we want rising seventh graders' experience to be across WCSU?
- Are the costs (time, labor, financial, etc.) of doing things separately on this topic prudent?
- Am I open to considering changes this opportunity presents?

It deserves to be noted that Curriculum, Instruction and Assessment has already made strong strides in its common leadership and service to all students in all districts. Special Education is on the path to similarly doing so with an emerging centralized approach.

It further deserves to be noted that the inception of UHSD #32 (its doors opened in the fall of 1971) is regarded by many as the single most significant WCSU governance change to date. The WCSU member communities determined that pulling together by pooling its resources and remanding authority over secondary education to a new board (and one school) was in the best interests of students and their communities.

The Findings below are organized in three overall themes (Governance and Board Structure, Operations, and Structural Opportunities). There is no presumed ranking of these themes, or of the opportunities cited in each theme.

THEME I: Governance & Board Structures

Note: some following references are made to the "WCSU Roles and Responsibilities Manual for Administrators and Board Members." The document has a highly visible presence on the WCSU web site and seems to guide many practices across the supervisory union. It is noteworthy that the published document has not been formally adopted.

Opportunity 1. Expand the work of the WCSU Full Board. The Full Board, with its eighteen members, is comprised of three members (of five) from each town school district boards and three (of seven) from UHSD #32. As such, over half of all WCSU's thirty-two board members serve on the Full Board. It is this body that could assume much more responsibility and oversight of WCSU endeavors, for the express purpose of taking advantage of such economic and administrative efficiencies as will maintain and promote the well being of students in the district.

Upon doing so with eighteen board members, the Full Board could become more representative of the member districts (as contrasted with the smaller six member Executive Committee). With all WCSU students as its focus, the Full Board could become focused on harnessing efficiencies between and among the member districts for the benefit of all.

The current work of the Full Board reflects its limited responsibilities under the present Bylaws, and results in predictable "disconnects" between the work of the supervisory union and the interests of the local districts. At this time, there appears to be limited "reporting back and feedback solicitation" opportunities for Full Board members when working with their local boards on matters affecting all WCSU students. The resulting effect can lead to conditions of the supervisory union pulling in *different* directions, rather than pulling *together* as articulated in the Bylaw objective. A Full Board, with an expanded charge, could have the effect of strengthening ties between it and the local boards (and by extension, further strengthening ties between and among the local boards).

The working ethic of the Full Board would be that of service to all students across WCSU. Upon elevating its work with governance planning, SU-wide activities, and supervisory-union wide goals, such would directly address the WCSU Objective 2.40 as noted above.

An approach among some supervisory unions is to co-schedule Full SU Board meetings on the same evening and at the same (shared) location with local board meetings. The Full Board meeting precedes the local meetings with agenda topics that are either relevant to all, or can flow into the local boards' agendas. The technique of managing multiple local board meetings all-occurring simultaneously is referred to as a "carousel meeting structure;" the local board meetings take place in proximity to one another, and administrators rotate their

attendance between and among the local boards' meetings to address specific agenda topics. While thoughtful attention to agenda construction (and meeting management) are necessary to keep the carousel moving in an orchestrated fashion, successful application of carousel meeting formats have resulted elsewhere in more efficient meetings with more SU-wide integration opportunities for member districts.

Opportunity 2. Streamline goal setting process. There are two general kinds of goals: (1) administrative goals and (2) board goals. The former are "owned" by the administration, are often determined through agreement between the board and administration with the board thereafter monitoring administrative goal attainment. Examples include organization growth evidenced by improvements in student achievement, fiscal management practices, policy development priorities, capital expansion, strategic plan execution and so forth.

The latter are "owned" by the board and tend to focus on its internal board operations. These are goals for the board to establish for the continuous improvement of the board. Role clarity, meeting management, board communications, board and organizational alignment, board team dynamics, board leadership succession and the like serve as examples.

There is ample evidence of goal setting across WCSU, but less evidence of coherence, either related to distinguishing between the forms of goals noted above or for strategic purposes. Boards' disparate goals can make supervisory unions vulnerable, as energy and resources to achieve the various goals become splintered. Instead, having board goals that are determined by the Full Board creates a focus for all students across the supervisory union. The result for administrators is an enhanced ability to employ a laser-like focus on accomplishing the single set of board goals.

This more efficient approach to goal setting involves local boards "pulling together" to direct common goals at the Full Board level, with the express intent for the Full Board and administration to focus its work on maximizing resources to achieve the goals.

Opportunity 3. Reconsider the composition and work of the Executive Committee. The current responsibilities of the Executive Committee are outlined in the "WCSU Roles and Responsibilities Manual for Administrators and Board Members." It is an expansive list of responsibilities as the Executive Committee works in service to the Full Board, yet its work is undertaken by only six board members. A great deal has been delegated to the Executive Committee.

There is an absolute role for an effective SU Executive Committee, but its functions should be reconsidered in tandem with those of the Full Board.

There is also a potential disconnect possible in the current manner in which the Executive Committee is populated. There is no requirement that the members of the Executive Committee also be members of the Full Board, which would seem necessary for purposes of continuity and consistency. The “Roles and Responsibilities” document asserts the intent of the Executive Committee as acting “in the best interests of the supervisory union as a whole, in close consultation with local boards.” Such unto itself is an inefficient communication structure, as the burden for one member per board to be the conduit from the local board for such a significant body of responsibilities is challenging.

In addition, there is a suggested randomness possible with local boards’ appointments of their Executive Committee representatives. A more efficient Executive Committee is made possible with consistency of appointment mechanisms across the local boards; ideas include the *de facto* assignment of each local board chair (or perhaps vice-chair) to the Executive Committee. In this example, board member orientation and training activities can be tailored to specific responsibilities.

Furthermore, such adjustments can help elevate the very quality of the Full Board’s and local boards’ agendas. Through more coordinated and intentional agenda planning, the work of the boards at both levels can be in service to one another.

Opportunity 4. Audit local board agendas. In parallel with Opportunity 1 (see above), a systematic audit of local board agendas would be instructive. It is not uncommon for the division of work between governance and administrative functions to become “gray,” yet the most efficient school boards are those that are clear about their roles and whose meeting agendas (and meetings) reflect those understandings. There are ways for boards to stay informed of information in their oversight of the organization, but meeting time spent on administrative functions is inefficient.

By extension, with an Executive Committee comprised of local board chairs, a fluid agenda-auditing process can naturally occur given the chairs’ role in jointly setting agendas.

A template for such an audit could be built using the VSBA document, “The Essential Work of School Boards”¹¹ as a foundation. Once developed, a “board buddy” audit system could also occur, with local boards performing friendly and constructive audits of each other’s meeting agendas (and perhaps meetings as well) for purposes of suggested meeting efficiencies and overall continuous improvement.

¹¹ <http://www.vtvsba.org/work.html>

One example of an unnecessary board agenda item is for the board to interview teacher finalists. Given the existence of screening committees on which the board typically enjoys a representative seat, and given the changed statute (16 VSA § 242(3)(A) ("The superintendent ... for each school board ... shall nominate a candidate for employment by the school district or supervisory union if the vacant position requires a licensed employee; provided, if the appropriate board declines to hire a candidate, then the superintendent shall nominate a new candidate.")), the interview(s) and vetting of the final candidate has already occurred.

Opportunity 5. Strengthen board agendas and management of meetings.

Some principals felt that while board meetings were friendly and accessible to the public, that the meetings themselves were not always efficiently run, taking more time than necessary. Unnecessary agenda topics can lead to inefficient meetings, and the nature of the discourse during and management of the meetings can also be hampering variables. One suggestion was for board chairs to routinely undergo formal training on how to lead efficient meetings.

Meeting frequency poses a related opportunity. When boards meet multiple times per month, it places added demands on principals' time and energy. These additional meetings also challenge the capacity of central office administrators to staff board meetings. Heightened meeting efficiency offers the prospect for reduced meeting frequency.

Opportunity 6. Assert clear purpose for administrative reporting. The "Roles and Responsibilities" document establishes a standing expectation of the Executive Committee in receiving "regular reports" from the Director of Curriculum Instruction & Assessment, Director of Special Education, Business Administrator, and Director of Technology. The most efficient manner for administrators to create reports for the governing body (recommended to be changed to Full Board) is with an articulated purpose. The express reporting format should be couched in the frame of, "Reporting for the purpose of _____ *[insert purpose]*." In this way, there is clarity not only for each administrator upon preparing his/her reports, but also for the governing body (recommended to be changed to Full Board) upon consuming the various reports.

Opportunity 7. Remand educational issues to the administration. When faced with public requests, concerns, suggestions and ideas about learning opportunities, boards can most efficiently address the matters by remanding the topic-at-hand to the superintendent. It is inefficient for a board to attempt to consider such issues, as they are best left to professional educators to address.

Opportunity 8. Examine the responsibilities of board members as articulated in the “WCSU Roles and Responsibilities Manual for Administrators and Board Members.” The document has a helpful structure to it, and is a model outline for other supervisory unions to consider. However, its content poses particular challenges for WCSU. Of particular note is the cross-reference to the WCSU mission, *“The mission of Washington Central Supervisory Union is to create and sustain an exemplary, vital PreK-12 educational system for the students in our member schools - Berlin, Calais, Doty, East Montpelier, Rumney and U-32.”*

If the supervisory union’s mission remains that of creating and sustaining an exemplary “Pre-K - 12 educational system,” then such serves as the ideal foundation for collectively framing or reframing the work of administrators and board members throughout WCSU. The reference to a single system in service to multiple member schools is an important guiding principle.

Within the “Roles and Responsibilities” document are inconsistencies noted which have the effect of clouding rather than clarifying various parties’ roles and responsibilities. If the document is to be maintained, it deserves to be examined and thoroughly edited. A starting place is to refresh parties’ understandings of 16 VSA §261a (Duties of supervisory union boards), which has changed in significant ways since the WCSU “Roles and Responsibilities” document was first crafted.

Opportunity 9. Restructure principals’ roles with board meetings. Many principals spoke of their fondness for their respective employing board, but also of their frustration over time associated with board meetings. Specific concerns centered on the inefficient “time sink” board meetings typically involve for them.

Combined functions of agenda-planning with the board chair and superintendent, meeting preparation, meeting attendance, and meeting “break-down” responsibilities result in many hours of their time per meeting. While generalized board service is an understood obligation of administrators, this particular set of functions serves to distract principals from their instructional leadership responsibilities.

If a key element of principals’ interface with the board is in providing current information about their schools, there are alternatives that may be more efficient than current practices. Among them include principals attending the meeting solely to deliver their reports, or through supplying a written report in lieu of attending the meetings. Appendix A shows one example of a written principals’ board report template. If Opportunity 1 is actualized wherein more centralized agenda planning commences at the Full Board level (or through the reorganization of the Executive Committee), it is reasonable to think that the need for principals to each be a part of local board meetings’ agenda development could become less routine.

Some principals reported being occasionally directed by their boards to complete specific tasks, perhaps as an historical carry-over from a previous era. The principals were aware that such actions by boards were inconsistent with current state law but were deferential in completing those tasks requested of them.

On a related note, the current practice of principals joining the superintendent and board chair for agenda planning appears redundant.

Opportunity 10. Clarify accountability chains. The “Roles and Responsibilities” document asserts that the Executive Committee “oversees the operations and financial control of the Central Office.” It further asserts the Executive Committee’s responsibility in holding “the Superintendent and Central Office administrators accountable for achieving ... goals.”

These are highly inefficient and inappropriate uses of time, both administrative and governance. The Full Board hires the Superintendent, who has direct responsibility for central office functions and performance. His/her staff members are accountable directly to him or her for their performance, and not to a board. It is not only misleading, but also inappropriate for a governing body to assume oversight of operations and financial controls as such are administrative functions.

In turn, the superintendent is (solely) accountable to the governing body for performance and goal attainment, as he/she is their direct employee. Other administrators are employees of the superintendent. (A similar recommendation is made relative to reference to holding “the Superintendent and his / her staff accountable for implementing goals and objectives required to accomplish the WCSU Strategic Plan.” If this specific accountability to the governing body is necessary to the document, it should be limited to the Superintendent and not include his/her staff.)

It is appropriate for a governing body (or its delegated committee) to receive timely and accurate reports about operations, financial controls, and goal attainment, and should come through the Superintendent. To continue with the current assertion suggests central office personnel are directly accountable to the board while being concurrently being responsible to their supervisor (superintendent); such is an inefficient structure.

Opportunity 11. Make principals’ responsibilities current. The “Roles and Responsibilities” document states, “Principals are accountable, by law 16 V.S.A § 244, to the Superintendent and to their local boards.” Such is inconsistent with the law because 16 V.S.A § 244 was amended twice in the past two years. Under current law, the principals’ duties section reads, “*The principal shall perform all duties specifically assigned by law or by the superintendent of the school district including the administration of policies adopted by the school*

board. The principal shall be answerable to the superintendent in the performance of his or her duties.”¹² Through this shared understanding, appropriate relationships and more efficient communications and reporting can occur.

Opportunity 12: Adopt an administrative compensation schedule. The “Roles and Responsibilities” document burdens the Executive Committee with setting the salary of central office administrators and staff. The superintendent is expected to make salary recommendations.

A more efficient process involves the governing board’s (recommended as the Full Board) adoption of an *administrative compensation schedule* that covers the affected positions (minimally principals and central office administrators). The compensation schedule should have metrics that take into account internal compensation consistency (other employees WCSU) and external consistency (“job alike” positions in the region).

The administrative compensation model should be sufficiently flexible to remain relevant over time. A governance advantage of having adopted an administrative compensation model is three-fold: (a) it helps ensure competitive salaries (both for purposes of retention and recruitment); (b) it offers predictability for purposes of budgeting; and (c) eliminates perceptions of the superintendent or governing body making salary decisions on personally-dependent variables.

Opportunity 13. Revisit the necessity for a governance role on the employment of central office administrators. There is frequent reference in the “Roles and Responsibilities” document to the Executive Committee approving the hiring of the *[administrator position]* upon the recommendation of the superintendent.” Elsewhere in the document is a reference to the Executive Committee’s role to “hire central office administrators and staff.” For the employment of administrators, the prior reference is more efficient (with the suggested improvement of using the term “employ” in place of “hire”). For the employment of non-administrative staff, such is more efficient when the activity is solely the responsibility of the superintendent (or administrative designee).

Opportunity 14. Annually subscribe to codes of ethics and protocols. For purposes of efficient governance operations, some supervisory unions, typically at the annual reorganizational meeting of local boards, take time to revisit its working covenants and codes of ethics. Upon annually reviewing the document(s), individual board members then literally sign on to the document. The practice underscores the established shared values and expected conduct of

¹² <http://www.leg.state.vt.us/statutes/fullsection.cfm?Title=16&Chapter=005&Section=00244>

members. The document(s) could be “owned” by either the Executive Committee or Full Board. The VSBA Code of Ethics (and perhaps an updated version of the WCSU “Roles and Responsibilities”) can serve as a starting place in establishing the foundation for this annual norm.

Opportunity 15. Delegate acceptance of all grants to the superintendent.

Grants are typically *pro forma*, and the formal acceptance of grants by local boards is an unnecessary step. A more efficient protocol, consistent with that of supervisory union grants is to have local boards annually grant the superintendent authority to “accept and administer grants on behalf of the supervisory union for the ensuing fiscal year.” Administrative reporting to the appropriate governing bodies is a method for boards to remain current on grant activity.

Opportunity 16. Reduce WCSU’s and U-32 policy committees to one.

WCSU is a “complete” supervisory union, as all of its elementary districts are members of its union high school district. Accordingly, from a policy perspective, and in support of the WCSU mission (“create and sustain an exemplary, vital PreK-12 educational system”) a single policy committee could oversee SU-wide policy development and revisions. Even grade specific policies (such as kindergarten entrance or graduation requirements policies) can be cooperatively developed by a single policy committee.

Opportunity 17. Establish common policies. District distinctions are formalistic governance constructs. Families and students do not routinely think of their WCSU school experiences as participating in two school systems (elementary and secondary). Rather, those students moving exclusively through the WCSU education system attend two schools and their experience is that of transitioning between grades six and seven. As all WCSU’s rising seventh graders make this transition, and as seamless an experience as possible is in their educational interests.

For the WCSU student body (and their parents) to have five different elementary policy experiences is unnecessary and inefficient, regardless of how similar local school districts’ policies may be. Furthermore, multiple adoption protocols across multiple boards, coupled with the challenge of administrative challenge of administering multiple iterations of a policy underscore inefficient policy processes. Noteworthy is that no policies were found to be dramatically different between WCSU member districts.

WCSU is sufficiently cohesive to operate with a common policy platform, and the current redundancies inherent with current policy process are many. These include not only two board policy committees, but also local board meeting time spent putting “local touches” on policies. A more efficient flow would be to:

- Reduce the two policy committees to one
- Ensure local board representation on the (one) WCSU policy committee
- By local policy, remand policy adoption to the Full Board
- Ensure that fully adequate feedback loops exist between the local boards and the policy committee
- Rework existing districts' policies into common policies

Opportunity 18. Remand responsibility for procedures to the superintendent. The “Roles and Responsibilities” document includes responsibility for the Executive Committee to “approve procedures when appropriate for the implementation of policy.” A more efficient method is to remand responsibility for writing all procedures to the superintendent. The board and superintendent may arrange a process for the board to review procedures for purposes of ensuing alignment between written procedures and policy intentions, but the governance role ought be limited to policy development and adoption.

Opportunity 19. Edit board presence on the schools' web sites. This is indirectly a board function, but the lack of coherence among the various local boards' web presences is inefficient for all, but most notably for citizens. Inconsistencies, both in the layout and content of the boards' links do not reflect a systematic approach to a PreK-12 educational system at the governance level. (Three schools' sites have a direct tab for “school board,” two schools embed board links under “administration,” and one embeds board links under “about.”) The current layouts awkwardly lend the appearance of WCSU as a series of school systems. Additionally, the architecture of the separate school sections of the WCSU site makes it “click intensive” for users to navigate between and among the links of different boards and could be revamped.

An important symbolic opportunity presents itself with the supervisory union's web presence to represent WCSU as a system. Minimally, every elementary parent has a vested interest in the high school (and some households concurrently have elementary and secondary students), and deserves an efficient web experience, regardless their town of residence. All citizens can benefit through checking in on their educational investment with a simpler and more seamless district-wide web experience.



THEME II: Operations

This theme addresses opportunities within the broad category of district operations. Opportunities are organized by operational sectors, although some opportunities may cross over between and among sectors.

- Business Operations
- Centralized Services
- Collective Bargaining
- Human Resources
- Professional Development & Curriculum Development
- Special Education
- Technology

Business Operations

Opportunity 20. Audit the current district financial software. The current software (NEMRC), with its accompanying modules, has generally seemed to work well for WCSU. However, like all software, it has its deficiencies and limitations. A professional audit of WCSU's financial systems software needs could be compared with the NEMRC software for purposes of ensuring satisfactory financial (and related human resource) accountability.

Furthermore, an internal audit of which personnel have (or do not have) access to various system modules would be purposeful through the lens of efficiency. This should include principals, budget managers, school assistants, department head(s), and appropriate others and determine who are the consumers of which financial data.

Opportunity 21. Examine the work-flow of the purchasing structure. A description of the work-flow for U-#32 purchases suggests many individuals engaging the process at the building level. It would be a worthwhile exercise to track a single purchase from the budget manager level through the system to the point of payment at the WCSU office. One extreme example stated that three different individuals worked with a purchase order for an item costing less than four dollars at U-#32 before the principal then signed the purchase order. The labor costs associated with this purchase must have exceeded the cost of the purchase. Industry averages for labor "costs per purchase order" vary widely, from high single digit (dollars) to high double digit (dollars). By examining the WCSU purchasing work-flow, opportunities for more efficient processes may become evident.

Opportunity 22. Enable electronic inter-agency payments. Annually, there are hundreds of WCSU internal (interagency) billings and payments currently

made by check. By moving to an electronic payment system for these specific bill payments, considerable time could be saved.

Opportunity 23. Rethink principals' contract terms. Year-round employment contracts for school principals have been the norm. Closing schools' offices during some vacation stretches (i.e., the month of July) may allow for school administrators' contract terms to be modestly abbreviated. While such may pose temporary inconveniences to families and vendors, rotational closings or shared services out of fewer offices could still provide services during periods of closure.

Opportunity 24. Consider the effects of principals managing contracts and vendors. Principals report varying periods of "lost time" when they serve as their school district's point-of-contact around bidding, supervision of contractors, and related contract and vendor requirements. There is little relationship (if any) between their time spent on these functions and that of their instructional leadership responsibilities. Some examples include snow plowing and shed construction bids. Principals reported this condition is exacerbated during periods of intense school construction at their location.

Opportunity 25. Use common bidding approaches. This opportunity speaks for itself. Some administrators report that while common bidding is encouraged in many areas, there remains freedom to bid independently at the local district level. Reasons for independent bidding can include personal preferences, familiarity with vendors, keeping business local and so forth. Where common bidding (often through the state's official bidding list) can occur, it can often be a more efficient process as well as more cost effective.

Opportunity 26. Know when to go "off" the state bid list. The state's Agency of Administration (Buildings and General Services Division) manages bid procurement and makes the bids available to schools; however, it can be an imperfect process. There have been opportunities where other options have been more cost-effective for schools (see prior references to Vermont/NY/NH Food Service Directors' Association and the Vermont Facilities and Maintenance Directors' Association.)

When multiple individuals within an organization separately negotiate complicated copier deals, lost leverage and inefficiency can result. An area where supervisory unions have frequently bested the state bid pricing is in the area of photocopier leasing; use of a broker (see this example <http://www.spcopypro.com/>) has saved some supervisory unions the equivalent of a teacher's salary per year over multiple years.

Opportunity 27. Authorize bill payments in advance of warrants. Principals reported some frequency of late bill payments that result in additional fees. Some also described flurries of activity as sometimes necessary to keep accounts payable processes in motion (such as custodians driving the “blue bag” between locations).

The current practice of enabling bill payment in the absence of board meetings is partial step forward. Further efficiency can be realized if each board annually (perhaps at the time of local boards’ reorganizational meetings) authorizes “the payment of bills in *advance* of warrant approval.” This protocol can keep the accounts payable system in fluid motion, and not dependent on the frequency of board meetings as related to particular bills. In paying bills as they arrive, late fees can be avoided and less situational activity required around board meeting schedules. Warrants can (and must) still be reviewed and formally approved by boards, but otherwise delaying payment is unnecessary.

Opportunity 28. Reconsider purchasing and accounts payable practices. Principals described frustration with the volume of time they spend on financial paperwork, typically on a daily basis. One principal described a “three and a half inch stack of financial paperwork needing my signature each day.” The paper-centric system has inherent redundancies with the same document (frequently with older NCR copy technology) requiring processing by multiple individuals at the school level. While the current financial software system has the potential for electronic processes, administrators understand it is not employed based on the board’s fiscal controls preferences. This subject could be reviewed with a joint interest in saving labor while maintaining needed controls.

Opportunity 29. Administratively re-norm formatting of financial statements. Some principals felt they would be better served in managing their budget responsibilities with adjustments to the formatting of their financial reports. Also, monthly reports were felt to be a preferred frequency for receiving reports. (This would not require board action.)

Centralized Services

Opportunity 30. Design a shared services model for property services / maintenance / building and grounds functions. Currently there exist iterations of the job title “custodian” among the elementary districts; these include related titles of “head custodian” and “night custodian.” With the exception of one elementary custodian taking leadership with asbestos management protocols at other schools, each elementary school has its own staff, totaling approximately twelve.

UHSD #32 employs fifteen custodial and maintenance staff, with titles including

maintenance and mechanic, custodian, head custodian and director.

Some elementary principals reported their schools hold independent contracts with various vendors (such as heating and ventilating firms), which often merely guarantee the schools' access to services. Once on site, the vendors' hourly rates follow. Conversely, many of the maintenance-related functions at UHSD #32 get attention from on-staff personnel. There appears to be both a willingness and capacity to share talent across district lines, but no structure to do so is in place; a particular barrier noted was that of each school serving as an independent budget center.

Sharing talent (both custodial and maintenance-related functions) between and among districts can jointly save money and maximize the use of these important human resources. Significant efficiency opportunities exist within the framework of a shared services agreement. There are iterations that could be considered including a fixed number of hours of shared availability, billing in arrears, billing in "real time," making one employer (i.e., UHSD #32 or WCSU) the universal employer and other formats. Some other supervisory unions, operating within similar master agreement confines have developed successful models; the use of technology (such as "School Dude" for service request ticketing management) has also been helpful.

Opportunity 31. Utilize the purchasing power of Vermont's FMDA.

Respondents reported inconsistent approaches to purchasing facilities and maintenance related supplies (wax, cleaners, paper products, etc.) between and among schools. In recent years, a grass-roots organization in Vermont has begun to address the need for shared purchasing. The (VT) Facilities-Maintenance Directors Association (FMDA) Buyers Group has become a buying force across the state as it procures goods at a much larger scale than any single school could. The buying power directly translates to costs savings for school districts.

At a much larger scale for commodities not available through the FMDA Buyers Group, this opportunity could be further considered in the context of a regionalized approach, involving joint contracts with other supervisory union(s).

Opportunity 32. Consolidate food service functions. Not unlike buildings and grounds functions, food service operations across WCSU also operate in "silo" fashion. Local districts' budgets subsidize food service operations to varying degrees.

Redundancies abound in WCSU food service operations. Each schoolhouse has its own cooking operations. Each site also has its own food services agent. Each location generates its own menus. And recently, every kitchen must now comply with new federally required meal composition requirements. While the

WCSU office has assumed central responsibility for processing free-and-reduced lunch applications, day-to-day operations continue to be site-based.

Opportunities to become more efficient in food service functions include:

- Centralized menu planning offering consistency between schools;
- Capitalize on commodities pricing advantages through the Vermont/NY/NH Food Services Directors' Association (FSDA);
- A single lunch agent managing the bureaucratic responsibilities for all schools (now undertaken by six agents in six locations);
- A shift to fewer kitchens managing daily food preparation (with food being transported to other locations); and
- Fully centralize food service operations and food service authority as a WCSU function.

At a much larger scale, this opportunity could be further considered in the context of a regionalized approach, involving joint contracts with other supervisory union(s).

The Agency of Education and the Vermont Food Service Directors' Association can be resources to further considering opportunities for enhanced food service efficiencies.

Opportunity 33. Employ the “School Nurse Leader” school health services delivery model. Current health services staffing levels among WCSU elementary schools results in part-time nursing coverage. Principals report that when part-time school nurses are employed, delegation of nursing duties must fall to non-health service personnel (such as administrators or administrative assistants) in nurses' absences.

One model employed in some supervisory unions can be considered by WCSU; specifically, per the Vermont Department of Health, it is referred to as the “school nurse leader” approach. The Secretary of Education recently affirmed¹³ that the use of the school nurse leader model can be compliant with the school nurse requirements in the Education Quality Standards of the State Board of Education's Manual of Rules and Practices, at Rule 2121.5.

The Secretary's memorandum on this topic (in part states), “SUs that follow the recommendation of the VDH and employ SN Leader Model are in compliance with EQS, from the AOE's perspective. This includes cases where use of the model may result in an SU or SD with a full-time RN on staff and some component schools with an embedded LPN on staff, full-time at one or more schools, who directly reports to the supervising RN. This RN is also available for service delivery as may be needed, depending upon the circumstances. EQS recommends that schools implement the SN Leader Model, since it is

¹³http://education.vermont.gov/documents/Memo%20to%20Supts_SN%20Leader%20Model_11_18_2014.pdf (retrieved November 26, 2014)

endorsed by the Vermont Department of Health and this delivery model "is consistent with the principles of the national Coordinated School Health Model, to ensure appropriate access and coverage across their district or supervisory union." See Rule 2121.5. SUs and SDs that follow this model do not need to seek a waiver from EQS from the State Board of Education since following the SN Leader Model satisfies Rule 2121.5, based on AOE's interpretation and implementation of this administrative rule."

Opportunity 34. Restructure the student transportation system. Running redundant bus routes (elementary and secondary) duplicates miles and costs, and serves as a "driver" in defining the school day for all schools. There are schools in Vermont that have had success with elementary and secondary students co-existing on busses. Reducing two runs to one could yield bus contract efficiencies. To manage ridership interests within a single K-12 route structure seating zones could be established; even additive costs such as bus supervision monitors and/or on-board WiFi could result in overall savings.

Additionally, an examination of ridership on routes is currently under consideration, which could highlight the efficacy of the defined bus routes. If families are not regularly accessing the student transportation service, then route adjustments may be in order to reduce the number of "routes."

The current WCSU student transportation structure is a hybrid of a centralized and decentralized system.

The current bus contract is a common contract, held jointly by the member districts. Under the auspices of 16 VSA §261a(a)(8)(E) ("provide transportation or arrange for the provision of transportation, or both in any districts in which it is offered within the supervisory union"), future contracts could be singly held between WCSU and the bus contractor. This activity alone would not result in savings, and would result in a shift of budget centers for transportation from the local budget to the SU budget. However, it would more accurately reflect the work of the WCSU Transportation Committee.

The current system of the Transportation Committee could continue, as would routes administratively being coordinated through the central office. However, the efficiency of this structure can be compromised if local school boards make situational bussing decisions that have an effect on the system in its entirety.

Collective Bargaining

Opportunity 35. Consider the impact of collective bargaining agreements on instructional leadership. Principals report blocks of their time being inefficiently spent on direct student supervision (including bus arrivals and departures) as a direct result of board concessions made with teachers through

collective bargaining. Principals feel that these particular times could be better spent with teachers (individually or in groups) in promotion of the school's educational mission; times when teachers are most available tend to be when principals are least available. By way of example, elementary principals report that because they are often providing supervision at bus departure time that they are not able to meet with teachers until 4:00 p.m.

Opportunity 36. Use electronic payments required for all employee reimbursements. Employees currently elect their desired format for reimbursements. Time and costs can be saved through requiring all employee reimbursements be disbursed electronically (i.e., direct deposit).

Opportunity 37. Require direct deposit for payroll. Similar to the processing of reimbursements, employees may elect their format for payroll. While the district encourages direct deposit, it is not required and through the collective bargaining agreement remains an option for employees. This opportunity, if changed through collective bargaining, would result in payroll processing efficiencies.

Human Resources

Opportunity 38. Consider the effects of limited human resources staffing at the WCSU office, and the related effect on principals' time. WCSU runs "skinny" with its human resource services at the central office as coordinated through a human resources clerk. Her capacity is stretched, and many human resource requirements fall to the schools. As a result, principals and their assistants spend considerable time managing school vacancies, substitute acquisitions, criminal records management, early education licensing responsibilities and related functions that may be more efficiently handled with expanded central office staffing. The effect on principals is a direct drain away from time available for instructional leadership. Expenditures (as a percentage of the entire budgets) of WCSU's centralized administrative services (this does not include principals) are consistently below the state average, suggesting incomplete administrative supports at the WCSU office.

Opportunity 39. Consider Information Technology and Human Resources as departments for joint agreements with other supervisory union(s). Striking a joint agreement between and among supervisory unions is an under-utilized method of efficiently delivering on needed school district services. Vermont statute (16 VSA § 267) invites the approach, and state grant funds may be available for purposes of studying the viability of doing so.

Two areas should be considered: (1) information technology and (2) human resource management. These areas run “skinny” in WCSU, and services can be compromised as a result. By pooling resources with one or more other supervisory unions, either or both of these services could be both expanded and made more cost effective.

In studying the prospect of forming a joint agreement over information technology, it could be limited to network management, or be expanded to include data processing and management (analyst and programmer levels), as well as hands-on technician level work. The desired service breadth ought to be first considered, as that could dictate whether contiguous supervisory unions (only) could be sought as partners.

The area of human resource management is another area fertile for consideration. Given the wealth of remote-technology based human resource platforms that exist, it may not be as necessary that consideration be given only to joining with immediately neighboring supervisory unions. While every supervisory union has its unique variables (such as pay schedules, leave allotments, etc.), there nonetheless remains a great deal of commonality on managing school districts’ human resource needs.

Both of these departments are areas which supervisory unions often struggle with to internally find efficiencies. Two factors tend to be problematic: limited scale and the multiple organizations (districts) within supervisory union umbrellas. To the issue of scale, it may not be difficult to find other supervisory unions with similar joint contract needs in these areas.

Opportunity 40. Install technology-based substitute management and human resource systems. This directly relates to the previous opportunity. Many supervisory unions have successfully centralized their substitute management system (employee leave management, substitute recruitment, substitute calling and acquisitions, substitute evaluations and so forth) through technology solutions. One such automated telephone-based system is “AESOP,” although other systems are also popular on the marketplace. Schools have found that investments in these systems become immediately cost-efficient as labor-intensive manual practices get replaced.

More broadly, adding a technology-based human resources system would result in a more efficient use of personnel time, including principals and their assistants. Common references to the current human resources protocols are “paper centric,” “forms heavy,” and “time consuming.” A sub-body of human resources related functions center on accountability and tracking, most of which could be readily addressed with technology-based human resource systems. \$2,500 (annual) grants are available through the Vermont School Boards Insurance Trust (VSBIT) for the express purpose of HR related audits.

Opportunity 41. Share elementary schools' professional development *in situ*. The need for meaningful professional development opportunities run squarely up against routine barriers including costs, time, travel, absence from classrooms and so forth. East Montpelier Elementary School has structured its teachers' and students' schedules in a fashion that meaningfully puts teachers together during the instructional day for purposes of their shared planning and joint learning. While it is impractical for teachers from other schools to physically join East Montpelier's teachers on a regular basis, a remote option exists.

Through use of remote-in technologies (i.e., Skype), fellow elementary teachers from across WCSU could enjoin EMES colleagues. Requirements for this to be effective and practical require making the elementary schools' schedules more similar and jointly structuring relevant agendas.

Opportunity 42. Use remote technology to make curriculum development more cost effective. WCSU's efforts to meaningfully engage teachers in ongoing curriculum development activities is appropriate, as the end products are both stronger as a result of the collective thinking of committees; in addition, teachers are more likely to be invested in the outcomes of such important work.

However, the costs of teachers leaving their classrooms to accomplish this work are two-fold: the quality of instruction carried on by substitute teachers is sometimes comprised not to mention the additive costs of each substitute. These conditions are compounded at the elementary schools due to the generalist nature of the teachers' work and the need for broad representation on district-wide committees.

An accommodation to schedule curriculum-related committee meetings from 1:30 – 4:30 pm on school days has somewhat helped. However, teachers' travel time to a common location erodes time otherwise available for meetings.

A more efficient alternative could be the use of remote-in technology, where teachers could remain at their school while still participating in the district-wide committees thereby capturing travel minutes per meeting per participant (cumulative to hours over the year).

An alternative recommended by some respondents was to examine the schedule practices of neighboring Montpelier Supervisory District, which runs some abbreviated student days with teachers' professional development needs occupying the balance of the workday.

Opportunity 43. Enforce pre-paid or reimbursed professional development costs more strictly. The teachers' collective bargaining agreement pre-imburses or reimburses teachers for approved graduate course work (credit hours to be applied for salary movement must be aligned with the school's or supervisory union's strategic plan or action plan or aligned with the teacher's IPDP or the Blue Ribbon Process). Respondents felt that a culture of liberally approving pre-imburements and reimbursements exists, and that some teachers' professional development activity costs did not meet the necessary thresholds. A similar condition of liberal approvals was noted for workshop and conference attendance pre-imburements and reimbursements.

Special Education

Opportunity 44. Redeploy some education specialists through central assignments. WCSU has already begun to realize efficiencies from having centralized its special education assessment team. As Act 156 requires the centralization of all special education services (which WCSU is in process of achieving), the specific use of special educators beyond single school assignments could maximize talent and possibly reduce the required number of teachers. More flexible deployment of special educators is an ideal rooted in Act 156. Presently, only one special educator has responsibilities at multiple schools.

WCSU special educators' "case loads" range from three to eighteen. Consideration is given to individual special educators' case loads with respect to the time required to support individual students' needs. It is important to note that no norms specific to case loads have been published, so workload is relative to the specific system of interventions in use at a school, coupled with degrees of complexity among individual students' cases.

Rules-of-thumb come into play, and per Dr. Giangreco's work¹⁴ at the University of Vermont suggests that one special educator per 80-100 students. Once the ratio of 100:1 is exceeded, pressures can compromise the efficacy of interventions. At the WCSU elementary level, small school size is an inhibitor to maximizing special education staffing efficiencies.

Use of Giangreco's "Evolve" model (presuming the state average of 15% of students eligible for services) at 100 ADM per special educator, a caseload of fifteen could be considered acceptable. However, if specific local cases are more complex and a higher level of direct special educator involvement is required, a caseload range of seven to nine would be considered reasonable.

¹⁴ <http://www.uvm.edu/~cdci/evolveplus/>

There is a need to be nimble with caseload assignments, and such are driven from the particular intervention system in place. To this point, respondents felt there were inconsistencies in the currency and fidelity of a universal approach across WCSU schools.

The best leverage in attaining efficiencies lie in gains through student groupings and master scheduling while being mindful of intervention strategies. At a very high order, a split of two-thirds time with students and one-third time spent planning is an industry rule-of-thumb.

Opportunity 45. Continue to build on alternative student placement opportunities through regional collaborative ventures. Serving highly specialized student needs within small systems is not a unique challenge for WCSU. As related to staffing and services, small schools' capacities and services can be exceeded when addressing some highly specialized student needs. WCSU and neighboring supervisory unions (and districts) are currently exploring the creation of regional cooperative placements tailoring expertise and services to better meet the needs of some students. Such collaborative ventures can only better serve some individual students, but also do so more efficiently.

Opportunity 46. Assess the currency of the U-#32 special education services delivery model. One respondent suggested it is timely for a review of how special education services are delivered at U-#32. Concerns over some outdated aspects of the model surfaced included an over-reliance on students being pulled out of classrooms for services, a higher than necessary number of self-contained structures, and unnecessary levels of segregation of student populations. An assessment considering the effects of the model's specifics on staffing levels presents an opportunity.

Technology

Opportunity 47. Standardize technology training. Respondents spoke to a wide range of technology skills among WCSU professionals. At some locations, educators rely on "internal resident experts" for assistance. The WCSU technology department has provided some on-line tutorials to further assist. The new student data management system, which requires periodic inputs by teachers is not used frequently enough by them to allow for a high comfort level with the software, which prompts "9-1-1" style calls to central office personnel (such as during report card intervals).

A concerted training program on essential technology skills should reduce frustration, over-reliance on individuals to assist, and otherwise wasted time and effort.

Opportunity 48. Set design parameters for schools' web sites. While each school has a web presence on *wcsuonline.org*, inconsistencies among them do not reflect positively on WCSU working as a system. Content from the schools' sites appropriately reflect the interests, activities, and business of the respective schools. However, some standardization of the "look," categories, and integration between and among the sites would not only be user-friendlier, but also reflect well upon WCSU as a school system, as opposed to a system of schools. Web site users would also benefit from a standardized approach to linked files; the use of *.pdf* file formats is customary, while *.doc* is not.

Opportunity 49. Switch traditional phone service to VoIP. This opportunity should be considered the next time the SU-wide telephone service contract expires. Voice over Internet Protocol (VoIP) can shrink communication costs. Internal broadband capacity and some specialized equipment may be necessary before a switch to VoIP is viable. Many organizations smaller than WCSU have realized meaningful savings upon changing to VoIP technology.



THEME III: Structural Opportunities

Opportunity 50. Reconfigure grades and schools.

WCSU has six school buildings across its six districts, ranging in enrollment from an approximate low of 75 (Doty) to an approximate high of 801 (UHSD #32). The schools are not operating at capacity, nor based on enrollment projections are they likely to in the foreseeable future. Maximizing school facilities could result in one (or more) fewer schools, thus saving operational and some personnel costs; it should be noted that not all positions at a closed school would be eliminated, although some could. More balanced and predictable teacher-student ratios are made possible with fewer facilities. Beyond maximizing facilities and getting “leaner” with personnel levels are the heightened opportunities that emerge for education professionals who when co-located directly work together and learn from one another.

This particular opportunity lends itself not only to potentially very high dollar savings (facilities, infrastructure costs, and fewer personnel), but also with the direct “value add” that comes with fresh and meaningful collaboration activities.

At least two options are suggested for consideration:

- Move all WCSU sixth grade students to UHSD #32, therein expanding its middle school structure to grades 6-8. The fourth “quadrant” at UHSD #32 is capable of a restructured and expanded middle grades configuration. Middle schools housing grades 6-8 are a common configuration across the country.
- Whether sixth graders remain at the elementary schools or begin their transition to UHSD #32 a year earlier than is presently the case, there remains unused space at most elementary buildings. While all schools have a tendency to capitalize on otherwise unused space, many WCSU classrooms are not at capacity, nor are all classroom spaces being used for classrooms. Through attendance zoning (or other logical mechanisms), one or more elementary schools could be closed, with the affected town school districts sharing building(s) and governance through formalized joint contract arrangements.

The following chart reflects the number of elementary classrooms per schoolhouse accompanied by those in use by a full-time class of students. Principals were clear that while some classrooms may not be used as K-6 classrooms, that all were used at least part-time for instruction (such as library, foreign language, math, language arts, SLP, OT, art, music, counseling, office space, guidance, and other “specials”). Also, the data below also do not include pre-K or pre-K after care.)

Table 5. WCSU Elementary K-6 Classroom Utilization.

School District	Total Number of rooms	Number of rooms used by a full-time class
Berlin	16	11
Calais	11	7
East Montpelier	15	11
Middlesex	8	8
Worcester	8	4
<i>Total</i>	58	41

While there would be complex collective bargaining matters requiring attention, and formalized arrangements would necessitate state action, this has successfully occurred elsewhere in Vermont and can serve as models for examination. Doty and Calais are two schools for initial consideration.

Opportunity 51. Expand rights of transfer within the teachers' and ESP collective bargaining agreements. A labor attorney could be consulted on how best to provide more flexibility for the transfer of employees between and among districts for purposes of responding to changing staffing needs within the supervisory union. The present agreements isolate the districts' actions, therein limiting options for more fluid use of personnel across the supervisory union. Such would likely require structural changes to the in-place master agreements, and should involve the union's assistance to effectuate.

Opportunity 52. Make alternative work years or schedules non-elective. The current teachers' collective bargaining agreement makes alternative scheduling elective on the part of the teacher. This is a nice courtesy, but limits boards on maximizing its teaching resources. In negotiating a change to this condition can allow assignment of alternative teachers' schedules that may better serve students and the district.

Opportunity 53. Provide more clarity on work day definitions. The current teachers' collective bargaining agreement defines the work-day (curiously not defined in terms of "minimum") at seven-and-a-half hours. The agreement specifies that principals will establish the daily start and end times. Respondents reported there are differences between schools in whether principals consistently apply this standard.

Opportunity 54. Evaluate the school calendar. The traditional five-day school week over 180 yearly student days permeates Vermont. While many changes have been considered for adjustments to the statewide and regional calendars, few have been successful.

Some out-of-state school calendars have adjusted for both efficiency and effectiveness interests. Among these, one common approach is to reorganize the student school week to four days via longer school days. The effect of this approach effectively shuts down schools on the fifth day, therein saving on infrastructure and utilities costs (bussing, heating, lunches, custodial services, etc.). The fifth (non-instructional) day opens up possibilities for student call-back time, vendor access to schools, and dedicated teacher professional development time.

Cultural and historical aspects of the current calendar, the needs of families, the effect on inter-school activities (athletics), and State Board rules would all need to be considered. However, the financial savings and heightened school efficiencies could be considerable.

Opportunity 55. Monitor U-32 Policy G16: Class (Section) Size. U-32 is compliant with state law in having developed class size guidelines. The policy is clear about annual reporting by the superintendent to the board on the implementation of the policy. As the policy was adopted earlier in this calendar year, it has not yet had a full school cycle for reporting purposes. An intended effect of the law (and local policy) is that of helping ensure the most appropriate class (section) enrollments, and by extension to avoid under or over staffing. One method of refining the policy's intentions is shared clarity over *when* to benchmark the actual numbers of students per section, as numbers can vary depending on whether the factor that matters is registered students versus students actually in the class (once underway) at some appropriate benchmark. Through such clarity, the policy's efficacy can be commonly understood and evaluated.



APPENDIX A

Sample Principal Report Template

Following are themes that could constitute the regular basis for written principals' reports. Specific themes should be modified and set by the board to satisfy its regular informational interests.

The written report is designed to replace in-person reports by principals at school board meetings. When reports are provided to board members in advance of meetings (perhaps as part of a meeting's organizational packet), an opportunity for board members to pose questions and seek clarification can still occur.

- *Recent or pending celebrations for staff and students ...*
- *Achievements and accomplishments ...*
- *Progress made over the last month on action plan steps (or action plan priorities over the next month) ...*
- *Public events scheduled over the next month ...*
- *Ongoing school initiatives and pending changes ...*
- *Communications scheduled over the next month (what and to whom) ...*
- *Something I'd like the board to know ...*

APPENDIX B

List of Reviewed Documents

“External Review of Management/Leadership Services,” (working draft October, 2006: R. Proulx and L. Soares).

“Special Education Task Force Report,” (2011: A. Angney, et al).

“Phase I Governance Study: Structures for Excellence, Efficiency and Effectiveness Options: Rumney Memorial and Doty Memorial Schools,” (2010: R. Proulx).

<http://www.wcsuonline.org/>

WCSU schools’ websites

“WCSU Roles and Responsibilities Manual for Administrators and Board Members”

“WCSU Strategic Plan: 2008-2013”

Title 16: Vermont Statutes Annotated

WCSU 2014-15 School Calendar

2014-15 Staff Directory

Bylaws of Washington Central Supervisory Union

WCSU Policies

WCSU Policy Committee agendas and minutes

WCSU District Board agendas and minutes

Local boards’ agendas and minutes

Executive Committee agendas and minutes

WCSU Transportation Agreement

Boards’ goals

Class sizes (2013-14 and 2014-15)

APPENDIX B (continued): List of Reviewed Documents

Local districts' budget trends

Local districts' budget summaries

NESDEC 2013-14 Enrollment Projections

Room utilization

ESP collective bargaining agreement (2013-17)

Teachers' collective bargaining agreement (2012-16)