

**Orange Southwest School District (OSSD)**  
**Regular Board Meeting on Wednesday January 14, 2026**  
**Randolph Elementary School**  
**6pm**

**I. Opening (6:00 pm)**

- Board Attendance: *Ensuring a quorum*
- Meeting Purpose: Approve and Warn the Annual Budget for Orange Southwest School District
- Review and Accept Agenda: Any changes needed? *Meeting purpose? Are these the right agenda items? Is the right amount of time allotted?*

**II. Ownership Linkage (6:10)**

- General Public Comment: Please hold comments on the budget until the second public comment. *The Board welcomes comment but is not able to take any action. Comments limited to 3 minutes per speaker.*
- Up for Learning Presentation (Information)
- Facilities Update (Information/Board Discussion)
- Updated Budget Numbers and Preliminary Data (Action)
  - **Public Comment on Budget:** specific to the *updated budget information*. *The Board welcomes comment but is not able to take any action. Comments limited to 3 minutes per speaker.*
  - OSSD Budget Possible Board Motion: I move to authorize the OSSD expenditure budget in the amount of 29,159,606, (Action)
  - RTCC Budget Board Motion: I move to authorize the RTCC expenditure budget in the amount of \$3,605,569. (Action)
  - Raven Budget Board Motion: I move to authorize the R.A.V.E.N. expenditure budget in the amount of \$347,436. (Action)
- Next steps and Budget Timeline reviewed
  - Informational Meeting Date (Action)
  - Ballot (Action)
    - The Board needs to discuss the reserve Operation reserve account and the Buildings reserve account and decide how to use the 2024-2025 reserve account. Please see the superintendent report for details about this.
      - Possible motion if you would like to follow the administration's recommendation: I move to place the full 2024-2025 surplus in the amount of \$1,800,000 (Robin will

share the actual audited number at the meeting) in the  
OSSD Building Reserve Fund.

- Annual Warning Approval (Action)
  - Kyle will update the Annual meeting agenda based on what is decided above and share the warning at the meeting
    - Possible Board Motion I move to approve the 2026 annual warning as presented
- Board seats on the Ballot (Discussion)
  - Randolph
  - Brookfield

### **III. Board Process (7:00)**

- Support Staff Negotiations Update (Information)
- Annual Report to Voters from the Board (Action)
  - Possible Board Motion: I move to approve the annual report as discussed.
- Update on meeting with Legislators in February (Information)

### **IV. Board Education (7:10)**

- Reminder of Policy Governance Virtual Training January 22,2026

### **V. Monitoring the Organization (7:15)**

- Accept/Reject EL 2.4 & 2.5 (BMD 3.4.5) 2nd Read (Action)
  - Possible Board Motion: I move to approve Executive Limitations 2.4 and 2.5 as presented
- Financials (EL 2.3 Financial Conditions) (Information)

### **VI. Policy Decisions for District Governance (7:30)**

- Criminal History Record Checks Policy -- First Read
- B2 Volunteers and Work Study Students -- First Read
- C10 Prevention of Harassment, Hazing and Bullying -- First Read
- C14 Section 504 and ADA Grievance Protocol -- First Read

### **VII. Monitoring the Board (7:45)**

- *Board Self-Evaluation: Monitoring compliance with Board Governance Process and Board Management Delegation Policies.*
- GP 4.5 Board Members' Conduct & 4.6 Committee Principles – Self Evaluation (Discussion)
- District Quality Standards Survey (Discussion)

### **VIII. Consent Agenda (8:00)**

**Board motion I move to approve the Consent Agenda**

- Vote on acceptance of Consent Agenda: *Items that the Board has previously delegated to the Superintendent, but that an external authority requires the Board to approve. The entire Consent Agenda is adopted by one motion, without discussion. However, an item can be removed from the Consent Agenda for discussion with a majority vote GP 4.3.4.*
- Approve Minutes from December 10, 2025 and Minutes from Jan 5, 2026
- Approve Annual Tuition Rate
- Set High School Choice Numbers (15/15)
- AOE Financial Management
- New Hires

#### **IX. Closing/Incidental Information (8:10)**

- Superintendent's Report
  - Ends Snapshot
- Action Item Recap

#### **X. Executive Session**

##### **Future Meetings**

- Agenda Planning Meeting: Tuesday February 3 at 6 pm
- RAB Meeting: 5 PM RUMHS
- Regular Board Meeting: 6pm February 11, 2026 at RUMHS

## OSSD Facilities Report DEC 2025

| Priority Level | Building   | Description                                            | Vendor                 | Estimate       | Status              | Date Complete Received | Notes                            |
|----------------|------------|--------------------------------------------------------|------------------------|----------------|---------------------|------------------------|----------------------------------|
| Work Orders    |            |                                                        | 241 new work orders    |                | 215 completed.      |                        |                                  |
| 1              | RES        | RES Renovation for climate control                     | TBD                    |                |                     |                        |                                  |
| 1              | RUHS       | Replace main Transformer                               | TBD                    | \$3-500 K      | Planned             |                        | Waiting on Engineer              |
| 1              | BRNT       | Replace lighting with LED                              | Harmony                | \$21,575       | Planned             |                        | Possibly Feb break               |
| 1              | RUHS       | Remove folding wall and replace                        | Lajeunesse             | \$23,984       | In-Progress         | 1/5/26                 | Waiting on invoice               |
| 1              | RES        | New Playground equipment                               | Ben Schaffer Equipment | \$38,054       | In-Progress         |                        | ice an issue                     |
| 1              | RES        | New Bleachers                                          | Robert H Lord Co.      | \$75,000       | Planned             |                        |                                  |
| 2              | RUHS       | Renovation of RUHS Auditorium                          | TBD                    | Getting Quotes | Awaiting Inspection |                        |                                  |
| 2              | OSSD       | Restriping of pavement RES/RTCC/RUHS                   | \$20,000.00            | Valley Line    | Planned             |                        |                                  |
| 3              | Fields     | Aeration, fertilization and safety rennovation         |                        | \$30,000       | Planned             |                        |                                  |
| 1(1)           | RES        | remodel: ovens, faucets, stove, drains need            | TBD                    | Quotes pending | Planned             |                        |                                  |
| 1              | RES        | Boiler Chimney Repair                                  | Chimney Savers         | \$17,000       | Planned             |                        |                                  |
| 2(3)           | Braintree  | water booster. Remove wood from serving                |                        | Quotes Pending | Planned             |                        |                                  |
| 2(4)           | Brookfield | components. Replace three bay sink.                    |                        | Quotes Pending | Planned             |                        |                                  |
| 1(2)           | RUHS       | sink, faucets, walls, ceiling, <del>serving line</del> |                        | Quotes Pending | Planned             |                        |                                  |
| 3(5)           | RUHS       | Cafeteria - ceiling, lighting, tables.                 |                        | Quotes Pending | Planned             |                        | Lighting has been changed to LED |
| 3              | RTCC       | replace ceiling ductwork, update electricity, add      |                        | Quotes Pending | In-Progress         |                        | Waiting on Schematics/Drawing    |

**ORANGE SOUTHWEST SUPERVISORY UNION**

**R.A.V.E.N.**

**BUDGET 2026-27**

| Function | Object | Description                     | 2020-21<br>Budget | 2021-22<br>Budget | 2022-23<br>Budget | 2023-24<br>Budget | 2024-25<br>Budget | 2025-26<br>Budget | 2026-27<br>Draft 2 | Dollar<br>Inc/Dec | Percent<br>Inc/Dec |
|----------|--------|---------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------------|-------------------|--------------------|
| 1200     | 100    | Teachers 1.0 FTE                | \$ 138,655        | \$ 81,535         | \$ 82,670         | \$ 87,632         | \$ 92,056         | \$ 78,525         | \$ 83,996          | \$ 5,471          | 6.97%              |
|          |        | Other stipends                  | \$ 1,800          | \$ 1,800          | \$ 1,800          | \$ 1,800          | \$ 1,800          | \$ 1,800          | \$ 1,800           | \$ -              | 0.00%              |
|          | 115    | Aide Salary 2.0 FTE             | \$ -              | \$ 19,875         | \$ 20,580         | \$ 22,730         | \$ 25,125         | \$ 27,140         | \$ 54,020          | \$ 26,880         | 99.04%             |
|          | 120    | Substitutes                     | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500           | \$ -              | 0.00%              |
|          | 200    | Health Ins                      | \$ 43,585         | \$ 21,170         | \$ 16,500         | \$ 18,420         | \$ 25,530         | \$ 28,065         | \$ 57,610          | \$ 29,545         | 105.27%            |
|          |        | Employer Taxes                  | \$ 10,750         | \$ 7,875          | \$ 8,040          | \$ 8,580          | \$ 9,105          | \$ 8,225          | \$ 10,695          | \$ 2,470          | 30.03%             |
|          |        | Dental Ins                      | \$ 3,680          | \$ 810            | \$ 810            | \$ 810            | \$ 810            | \$ 810            | \$ 810             | \$ -              | 0.00%              |
|          |        | Life Insurance                  | \$ 55             | \$ 30             | \$ 30             | \$ 30             | \$ 30             | \$ 30             | \$ 30              | \$ -              | 0.00%              |
|          |        | Municipal Retirement            | \$ -              | \$ 880            | \$ 1,080          | \$ 1,195          | \$ 1,385          | \$ 1,565          | \$ 3,240           | \$ 1,675          | 107.03%            |
|          |        | Child Care Contrib              | \$ -              | \$ -              | \$ -              | \$ -              | \$ 476            | \$ 400            | \$ 560             | \$ 160            | 40.00%             |
|          |        | VSTRS Retirement                | \$ 1,350          | \$ 1,350          | \$ 1,360          | \$ -              | \$ 1,600          | \$ 1,800          | \$ 1,650           | \$ (150)          | -8.33%             |
|          |        | Long-Term Disability Ins        | \$ 425            | \$ 320            | \$ 320            | \$ 336            | \$ 360            | \$ 325            | \$ 420             | \$ 95             | 29.23%             |
|          |        | Unemployment Ins                | \$ 500            | \$ 350            | \$ 350            | \$ 350            | \$ 385            | \$ 450            | \$ 450             | \$ -              | 0.00%              |
|          |        | Workers Comp                    | \$ 885            | \$ 565            | \$ 630            | \$ 730            | \$ 855            | \$ 785            | \$ 1,105           | \$ 320            | 40.76%             |
|          |        | Prof Dev                        | \$ 5,000          | \$ 5,000          | \$ 5,000          | \$ 5,000          | \$ 5,000          | \$ 5,000          | \$ 5,000           | \$ -              | 0.00%              |
|          | 400    | Rent                            | \$ 32,600         | \$ 32,600         | \$ 32,600         | \$ 32,600         | \$ 35,000         | \$ 35,000         | \$ 38,000          | \$ 3,000          | 8.57%              |
|          |        | Heat/Utilities/Phone            |                   |                   |                   |                   |                   |                   |                    |                   |                    |
|          |        | Telephone                       | \$ 1,500          | \$ 1,200          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,650          | \$ 1,650           | \$ -              | 0.00%              |
|          |        | Electricity                     | \$ 5,500          | \$ 5,500          | \$ 5,500          | \$ 6,200          | \$ 6,200          | \$ 8,200          | \$ 8,200           | \$ -              | 0.00%              |
|          |        | Propane/Heating                 | \$ 6,500          | \$ 3,500          | \$ 3,500          | \$ 6,400          | \$ 6,400          | \$ 6,400          | \$ 6,400           | \$ -              | 0.00%              |
|          |        | Equip Repair/Maint              | \$ 3,000          | \$ 3,000          | \$ 3,000          | \$ 3,000          | \$ 3,000          | \$ 3,000          | \$ 3,000           | \$ -              | 0.00%              |
|          |        | Equipment Rental                | \$ 5,000          | \$ 4,000          | \$ 4,000          | \$ 4,000          | \$ 4,000          | \$ 4,000          | \$ 4,000           | \$ -              | 0.00%              |
|          | 500    | Travel/Field Trips              | \$ 1,850          | \$ 1,850          | \$ 2,000          | \$ 2,000          | \$ 2,000          | \$ 2,000          | \$ 2,000           | \$ -              | 0.00%              |
|          |        | Bus Insurance                   |                   |                   |                   |                   |                   |                   |                    |                   |                    |
|          |        | Student Insurance               | \$ -              | \$ -              | \$ -              | \$ -              |                   |                   |                    |                   |                    |
|          |        | Liability Insurance             | \$ 400            | \$ 400            | \$ 400            | \$ 400            | \$ 450            | \$ 450            | \$ 450             | \$ -              | 0.00%              |
|          | 600    | Supplies/Materials/Texts/Office |                   |                   |                   |                   |                   |                   |                    |                   |                    |
|          |        | Supplies                        | \$ 18,000         | \$ 16,000         | \$ 16,000         | \$ 16,000         | \$ 16,000         | \$ 16,000         | \$ 16,000          | \$ -              | 0.00%              |
|          |        | Books/Periodicals               | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500          | \$ 1,500           | \$ -              | 0.00%              |
|          |        | Software                        | \$ 1,000          | \$ 1,000          | \$ 1,000          | \$ 1,000          | \$ 1,000          | \$ 1,000          | \$ 1,000           | \$ -              | 0.00%              |
|          |        | Fuel                            | \$ 500            | \$ 500            | \$ 500            | \$ 500            | \$ 500            | \$ 500            | \$ 500             | \$ -              | 0.00%              |
|          | 700    | Other Equip Incl Computers      | \$ 8,000          | \$ 8,000          | \$ 8,000          | \$ 8,000          | \$ 8,000          | \$ 8,000          | \$ 8,000           | \$ -              | 0.00%              |
| 2143     |        | Counseling Services             | \$ 9,000          | \$ 9,000          | \$ 9,000          | \$ 9,000          | \$ 9,000          | \$ 9,000          | \$ 9,000           | \$ -              | 0.00%              |
|          |        | <b>Total Operating Budget</b>   | \$ 302,535        | \$ 231,110        | \$ 229,170        | \$ 241,213        | \$ 260,567        | \$ 253,120        | \$ 322,586         | \$ 69,466         | 27.44%             |
|          |        | Overhead Costs                  |                   |                   |                   |                   |                   |                   |                    |                   |                    |
| 2400     |        | Administration (Voc Ctr staff)  | \$ 23,695         | \$ 23,800         | \$ 11,830         | \$ 11,150         | \$ 8,950          | \$ 8,950          | \$ 9,950           | \$ 1,000          | 11.17%             |
| 2520     |        | OSSD Fiscal & Admin Svcs        | \$ 13,950         | \$ 12,020         | \$ 11,405         | \$ 11,732         | \$ 12,650         | \$ 12,650         | \$ 14,900          | \$ 2,250          | 17.79%             |
|          |        |                                 | \$ 13,950         | \$ 12,020         | \$ 11,405         | \$ 11,732         | \$ 12,650         | \$ 12,650         | \$ 14,900          | \$ 2,250          | 17.79%             |
|          |        | <b>Total Budget</b>             | \$ 340,180        | \$ 266,930        | \$ 252,405        | \$ 264,095        | \$ 282,167        | \$ 274,720        | \$ 347,436         | \$ 72,716         | 26.47%             |
|          |        | Projected Enrollment            | 14.00             | 10.00             | 10.00             | 10.00             | 10.00             | 9.00              | 11.00              |                   |                    |
|          |        | <b>Tuition Cost per Student</b> | \$ 24,299         | \$ 26,693         | \$ 25,241         | \$ 26,410         | \$ 28,217         | \$ 30,524         | \$ 31,585          | \$ 1,061          | 4.02%              |

**ORANGE SOUTHWEST SCHOOL DISTRICT -  
EXPENDITURES**

| <b>Account Name</b>              | <b>2024-25<br/>Budget</b> | <b>2024-25<br/>Actual</b> | <b>2025-26<br/>Budget</b> | <b>2026-27<br/>Draft 3</b> | <b>Balance<br/>Under<br/>(Over)</b> | <b>Percent<br/>Inc/Dec</b> |
|----------------------------------|---------------------------|---------------------------|---------------------------|----------------------------|-------------------------------------|----------------------------|
| <b><u>INSTRUCTION:</u></b>       |                           |                           |                           |                            |                                     |                            |
| Salaries                         | 5,202,040                 | 5,082,570                 | 5,611,830                 | 5,792,901                  | 181,071                             | 3.23%                      |
| Benefits                         | 2,074,962                 | 1,746,726                 | 2,212,209                 | 2,347,755                  | 135,546                             | 6.13%                      |
| Drivers Education                | 4,000                     | 0                         | 4,000                     | 4,000                      | 0                                   | 0.00%                      |
| Remedial/Interventionist Servc   | 273,237                   | 295,262                   | 455,272                   | 324,179                    | -131,093                            | -28.79%                    |
| Testing/Tutorial/OT-PT Svcs      | 36,930                    | 34,718                    | 47,560                    | 48,160                     | 600                                 | 1.26%                      |
| Contracted Services              | 45,600                    | 39,535                    | 48,250                    | 48,250                     | 0                                   | 0.00%                      |
| Staff Training                   | 273,500                   | 148,808                   | 278,730                   | 269,735                    | -8,995                              | -3.23%                     |
| Co/Extra Curricular              | 526,192                   | 470,048                   | 541,536                   | 555,985                    | 14,449                              | 2.67%                      |
| Tuition                          | 54,000                    | 102,719                   | 58,000                    | 58,000                     | 0                                   | 0.00%                      |
| Travel/Field Trips               | 39,020                    | 8,083                     | 26,400                    | 26,400                     | 0                                   | 0.00%                      |
| Supplies/Textbooks/Equip         | 447,823                   | 318,870                   | 433,523                   | 433,523                    | 0                                   | 0.00%                      |
| <b>Total Instruction</b>         | <b>8,977,304</b>          | <b>8,247,339</b>          | <b>9,717,310</b>          | <b>9,908,888</b>           | <b>191,578</b>                      | <b>1.97%</b>               |
| <b><u>SPECIAL EDUCATION:</u></b> |                           |                           |                           |                            |                                     |                            |
| Salaries                         | 1,936,595                 | 1,637,092                 | 2,087,862                 | 1,890,625                  | -197,237                            | -9.45%                     |
| Benefits                         | 819,132                   | 634,533                   | 1,006,270                 | 861,161                    | -145,109                            | -14.42%                    |
| Contracted/Prof Services         | 0                         | 30,804                    | 0                         | 0                          | 0                                   | 0.00%                      |
| Transportation                   | 152,500                   | 261,849                   | 252,275                   | 325,000                    | 72,725                              | 28.83%                     |
| Travel/Conferences               | 11,700                    | 21,639                    | 12,800                    | 12,800                     | 0                                   | 0.00%                      |
| Supplies/Textbooks/Equipment     | 27,275                    | 17,927                    | 28,520                    | 29,125                     | 605                                 | 2.12%                      |
| Tuition                          | 1,069,700                 | 840,570                   | 1,189,000                 | 2,001,700                  | 812,700                             | 68.35%                     |
| Behavioral Services              | 230,249                   | 204,746                   | 226,211                   | 234,720                    | 8,509                               | 3.76%                      |
| Testing/Tutorial/OT-PT Svcs      | 164,000                   | 262,879                   | 144,000                   | 144,000                    | 0                                   | 0.00%                      |
| Speech Services                  | 339,459                   | 316,142                   | 392,039                   | 373,113                    | -18,926                             | -4.83%                     |
| <b>Total Special Education</b>   | <b>4,750,610</b>          | <b>4,228,182</b>          | <b>5,338,977</b>          | <b>5,872,244</b>           | <b>533,267</b>                      | <b>9.99%</b>               |
| <b><u>ADMINISTRATION:</u></b>    |                           |                           |                           |                            |                                     |                            |
| Salaries                         | 935,231                   | 1,061,637                 | 1,122,282                 | 1,052,952                  | -69,330                             | -6.18%                     |
| Benefits                         | 458,163                   | 416,746                   | 547,402                   | 533,550                    | -13,852                             | -2.53%                     |
| Repairs/Maint                    | 9,000                     | 255                       | 9,000                     | 9,000                      | 0                                   | 0.00%                      |
| Postage/Telephone                | 36,250                    | 35,565                    | 39,750                    | 39,750                     | 0                                   | 0.00%                      |
| Travel                           | 17,100                    | 26,455                    | 14,100                    | 14,100                     | 0                                   | 0.00%                      |
| Supplies/Equipment               | 45,115                    | 52,009                    | 55,815                    | 56,665                     | 850                                 | 1.52%                      |
| <b>Total Administration</b>      | <b>1,500,859</b>          | <b>1,592,667</b>          | <b>1,788,349</b>          | <b>1,706,017</b>           | <b>-82,332</b>                      | <b>-4.60%</b>              |
| <b><u>CENTRAL OFFICE:</u></b>    |                           |                           |                           |                            |                                     |                            |
| Salaries                         | 737,688                   | 743,493                   | 713,922                   | 727,905                    | 13,983                              | 1.96%                      |
| Benefits                         | 333,986                   | 257,657                   | 340,022                   | 382,010                    | 41,988                              | 12.35%                     |
| Contracted Services              | 10,000                    | 8,057                     | 10,000                    | 10,000                     | 0                                   | 0.00%                      |
| Legal Fees                       | 0                         | 0                         | 0                         | 0                          | 0                                   | 0.00%                      |
| Staff Development                | 5,000                     | 11,651                    | 7,500                     | 8,500                      | 1,000                               | 13.33%                     |
| Repairs/Maintenance              | 30,000                    | 24,180                    | 30,000                    | 30,000                     | 0                                   | 0.00%                      |
| Board Expense                    | 0                         | 0                         | 0                         | 0                          | 0                                   | 0.00%                      |
| Building Construction            | 0                         | 0                         | 0                         | 0                          | 0                                   | 0.00%                      |
| Insurance                        | 0                         | 0                         | 0                         | 0                          | 0                                   | 0.00%                      |
| Travel                           | 7,900                     | 7,112                     | 13,900                    | 13,000                     | -900                                | -6.47%                     |
| Supplies/Equipment               | 53,445                    | 42,126                    | 64,350                    | 64,550                     | 200                                 | 0.31%                      |
| <b>Total Central Office</b>      | <b>1,178,019</b>          | <b>1,094,277</b>          | <b>1,179,694</b>          | <b>1,235,965</b>           | <b>56,271</b>                       | <b>4.77%</b>               |
| <b><u>SUPPORT SERVICES:</u></b>  |                           |                           |                           |                            |                                     |                            |
| Guidance                         | 592,054                   | 742,463                   | 664,975                   | 702,978                    | 38,003                              | 5.71%                      |
| Behavioral/Social Work           | 412,237                   | 343,590                   | 383,110                   | 414,822                    | 31,712                              | 8.28%                      |
| School Nurse                     | 516,582                   | 476,043                   | 383,647                   | 403,211                    | 19,564                              | 5.10%                      |
| Media Services                   | 390,339                   | 381,278                   | 358,437                   | 391,386                    | 32,949                              | 9.19%                      |
| Curriculum Develop               | 31,255                    | 12,977                    | 31,310                    | 31,310                     | 0                                   | 0.00%                      |
| C.A.R.                           | 113,500                   | 47,992                    | 113,500                   | 113,500                    | 0                                   | 0.00%                      |
| Teacher Mentoring                | 58,010                    | 33,487                    | 58,010                    | 58,220                     | 210                                 | 0.36%                      |
| Board of Education               | 118,865                   | 92,517                    | 123,450                   | 126,450                    | 3,000                               | 2.43%                      |
| Legal Fees                       | 60,000                    | 42,870                    | 64,500                    | 69,000                     | 4,500                               | 6.98%                      |
| Fiscal Services                  | 85,000                    | 0                         | 85,000                    | 85,000                     | 0                                   | 0.00%                      |
| <b>Total Support Services</b>    | <b>2,377,842</b>          | <b>2,173,217</b>          | <b>2,265,939</b>          | <b>2,395,877</b>           | <b>129,938</b>                      | <b>5.73%</b>               |
| <b><u>MAINTENANCE:</u></b>       |                           |                           |                           |                            |                                     |                            |
| Salaries                         | 904,750                   | 852,328                   | 856,950                   | 908,500                    | 51,550                              | 6.02%                      |
| Benefits                         | 531,465                   | 383,982                   | 523,880                   | 556,793                    | 32,913                              | 6.28%                      |
| Contracted Services              | 118,720                   | 520,351                   | 235,531                   | 235,531                    | 0                                   | 0.00%                      |
| General Liability Ins            | 88,000                    | 94,929                    | 98,500                    | 115,000                    | 16,500                              | 16.75%                     |
| Repairs/Maintenance              | 287,260                   | 102,586                   | 287,260                   | 295,878                    | 8,618                               | 3.00%                      |
| Utilities                        | 541,000                   | 435,651                   | 564,200                   | 569,800                    | 5,600                               | 0.99%                      |
| Supplies/Travel/Equipment        | 298,350                   | 202,917                   | 353,400                   | 358,280                    | 4,880                               | 1.38%                      |
| Care of Grounds                  | 205,600                   | 215,128                   | 224,200                   | 249,000                    | 24,800                              | 11.06%                     |
| Reserve - Repairs/Maint          | 0                         | 0                         | 0                         | 0                          | 0                                   | 0.00%                      |
| Vehicle Services                 | 24,085                    | 13,574                    | 30,485                    | 30,485                     | 0                                   | 0.00%                      |
| <b>Total Maintenance Svcs</b>    | <b>2,999,230</b>          | <b>2,821,446</b>          | <b>3,174,406</b>          | <b>3,319,267</b>           | <b>144,861</b>                      | <b>4.56%</b>               |

**ORANGE SOUTHWEST SCHOOL DISTRICT -  
EXPENDITURES**

841,215

| <b>Account Name</b>                | <b>2024-25<br/>Budget</b> | <b>2024-25<br/>Actual</b> | <b>2025-26<br/>Budget</b> | <b>2026-27<br/>Draft 3</b> | <b>Balance<br/>Under<br/>(Over)</b> | <b>Percent<br/>Inc/Dec</b> |
|------------------------------------|---------------------------|---------------------------|---------------------------|----------------------------|-------------------------------------|----------------------------|
| <b><u>TECHNOLOGY:</u></b>          |                           |                           |                           |                            |                                     |                            |
| Salaries                           | 354,630                   | 325,002                   | 384,024                   | 375,610                    | -8,414                              | -2.19%                     |
| Benefits                           | 148,975                   | 123,421                   | 202,499                   | 146,756                    | -55,743                             | -27.53%                    |
| Contracted Services                | 24,500                    | 19,539                    | 24,500                    | 24,500                     | 0                                   | 0.00%                      |
| Technology Fund Transfer           | 108,500                   | 108,500                   | 108,500                   | 58,500                     | -50,000                             | -46.08%                    |
| Repairs/Maintenance                | 2,500                     | 453                       | 2,500                     | 2,500                      | 0                                   | 0.00%                      |
| Supplies                           | 145,100                   | 157,350                   | 151,450                   | 171,450                    | 20,000                              | 13.21%                     |
| Equipment                          | 0                         | 0                         | 0                         | 0                          | 0                                   |                            |
| <b>Total Technology</b>            | <b>784,205</b>            | <b>734,265</b>            | <b>873,473</b>            | <b>779,316</b>             | <b>-94,157</b>                      | <b>-10.78%</b>             |
| <b><u>TRANSPORTATION:</u></b>      |                           |                           |                           |                            |                                     |                            |
| Salaries                           | 266,055                   | 302,319                   | 324,750                   | 321,295                    | -3,455                              | -1.06%                     |
| Benefits                           | 62,664                    | 55,921                    | 76,783                    | 76,867                     | 84                                  | 0.11%                      |
| Contracted Svcs/Rent               | 73,000                    | 68,014                    | 73,000                    | 73,500                     | 500                                 | 0.68%                      |
| Travel/Conferences                 | 100                       | 0                         | 100                       | 100                        | 0                                   | 0.00%                      |
| Repairs/Supplies/Equip             | 59,300                    | 76,647                    | 69,250                    | 88,550                     | 19,300                              | 27.87%                     |
| Diesel Fuel                        | 90,800                    | 55,601                    | 92,000                    | 96,000                     | 4,000                               | 4.35%                      |
| Unallowed Spec Ed                  | 0                         | 2,734                     | 0                         | 0                          | 0                                   |                            |
| After School Transportation        | 75,000                    | 2,462                     | 0                         | 0                          | 0                                   |                            |
| Field Trips                        | 33,000                    | 25,056                    | 32,830                    | 33,030                     | 200                                 | 0.61%                      |
| Tuition Student Transportation     | 49,130                    | 43,779                    | 31,125                    | 37,486                     | 6,361                               | 9.19%                      |
| Bus Fund Reserve                   | 100,000                   | 100,000                   | 100,000                   | 100,000                    | 0                                   | 0.00%                      |
| <b>Total Transportation</b>        | <b>809,049</b>            | <b>732,534</b>            | <b>799,838</b>            | <b>826,828</b>             | <b>26,990</b>                       | <b>3.37%</b>               |
| <b><u>OTHER EXPENDITURES:</u></b>  |                           |                           |                           |                            |                                     |                            |
| Food Service Transfer              | 35,000                    | 138,443                   | 70,000                    | 70,000                     | 0                                   | 0.00%                      |
| Operational Fund Transfer          | 0                         | 0                         | 0                         | 0                          | 0                                   |                            |
| Special Ed Transfer                | 0                         | 0                         | 0                         | 0                          | 0                                   |                            |
| Legal Fund Transfer                | 0                         | 0                         | 0                         | 0                          | 0                                   |                            |
| Debt Service                       | 10,315                    | 9,754                     | 10,050                    | 0                          | -10,050                             | -100.00%                   |
| EEE Services                       | 95,353                    | 67,748                    | 95,353                    | 93,487                     | -1,866                              | -1.96%                     |
| <b>Total Other Expenditures</b>    | <b>140,668</b>            | <b>215,945</b>            | <b>175,403</b>            | <b>163,487</b>             | <b>-11,916</b>                      | <b>-6.79%</b>              |
| <b><u>TECHNICAL EDUCATION:</u></b> |                           |                           |                           |                            |                                     |                            |
| State - Act 68                     | 604,280                   | 627,121                   | 560,420                   | 510,145                    | -50,275                             | -8.97%                     |
| Local Tuition                      | 660,750                   | 663,498                   | 634,500                   | 604,668                    | -29,832                             | -4.70%                     |
| <b>Total Tech Education</b>        | <b>1,265,030</b>          | <b>1,290,619</b>          | <b>1,194,920</b>          | <b>1,114,813</b>           | <b>-80,107</b>                      | <b>-6.70%</b>              |
| <b><u>PRE-SCHOOL</u></b>           |                           |                           |                           |                            |                                     |                            |
| Salaries                           | 435,731                   | 418,276                   | 337,262                   | 348,950                    | 11,688                              | 3.47%                      |
| Benefits                           | 189,478                   | 178,535                   | 198,722                   | 203,144                    | 4,422                               | 2.23%                      |
| Administration                     | 56,029                    | 26,904                    | 0                         | 0                          | 0                                   |                            |
| Tuition/Partnerships               | 50,000                    | 26,633                    | 82,000                    | 83,500                     | 1,500                               | 1.83%                      |
| Supplies/Travel/Equip              | 32,075                    | 21,363                    | 18,650                    | 18,650                     | 0                                   | 0.00%                      |
| <b>Total Pre-School</b>            | <b>763,313</b>            | <b>671,711</b>            | <b>636,634</b>            | <b>654,244</b>             | <b>17,610</b>                       | <b>2.77%</b>               |
| <b>SUPRLUS/DEFICIT</b>             | <b>0</b>                  | <b>0</b>                  | <b>0</b>                  | <b>0</b>                   | <b>0</b>                            |                            |
| <b><u>SCHOOL TOTAL:</u></b>        | <b>25,546,129</b>         | <b>23,802,200</b>         | <b>27,144,943</b>         | <b>27,976,946</b>          | <b>832,003</b>                      | <b>3.07%</b>               |
| <b><u>FEDERAL FUNDS:</u></b>       |                           |                           |                           |                            |                                     |                            |
| IDEA - B                           | 329,400                   | 0                         | 329,400                   | 329,400                    | 0                                   |                            |
| IDEA - B - PreSchool               | 6,800                     | 0                         | 6,800                     | 6,800                      | 0                                   |                            |
| Title I and II - School Wide       | 680,960                   | 0                         | 680,960                   | 680,960                    | 0                                   |                            |
| Medicaid                           | 155,000                   | 0                         | 155,000                   | 155,000                    | 0                                   |                            |
| EPSDT                              | 10,500                    | 0                         | 10,500                    | 10,500                     | 0                                   |                            |
| <b>Total Federal Funds</b>         | <b>1,182,660</b>          | <b>0</b>                  | <b>1,182,660</b>          | <b>1,182,660</b>           | <b>0</b>                            |                            |
| <b>TOTAL VOTER APPROVAL:</b>       | <b>26,728,789</b>         | <b>0</b>                  | <b>28,327,603</b>         | <b>29,159,606</b>          | <b>832,003</b>                      | <b>2.94%</b>               |

# RTCC 2026–2027 Budget Proposal

## Impact of Enrollment Decline and Required Budget Reductions

Student enrollment calculations for the Regional Technical Career Center (RTCC) are based on a six-semester rolling average of attending students. Recent enrollment data are as follows:

| Semester | Enrollment |
|----------|------------|
|----------|------------|

|             |     |
|-------------|-----|
| Spring 2023 | 137 |
|-------------|-----|

|           |     |
|-----------|-----|
| Fall 2023 | 126 |
|-----------|-----|

|             |     |
|-------------|-----|
| Spring 2024 | 122 |
|-------------|-----|

|           |    |
|-----------|----|
| Fall 2024 | 97 |
|-----------|----|

|             |    |
|-------------|----|
| Spring 2025 | 85 |
|-------------|----|

|           |    |
|-----------|----|
| Fall 2025 | 99 |
|-----------|----|

This data demonstrates a clear downward trend in enrollment, declining from consistent enrollments in the 120–130 range to multiple semesters with fewer than 100 students. This decline has a significant impact on tuition rates, as tuition is calculated based on net expenditures per pupil. Even if expenditures were held flat, declining enrollment would result in a substantial increase in tuition.

When a level-service budget (maintaining the same services as the prior year) was modeled, the resulting tuition increase exceeded 26 percent. Based on feedback from sending districts and local communities, such an increase would be unacceptable. As a result, RTCC determined it was necessary to limit any tuition increase to approximately 5 percent or less.

To achieve this goal, RTCC must reduce the expenditure budget by approximately \$550,000. In developing reduction options, the administration prioritized minimizing the negative impact on students and instructional programming. The following reductions are recommended:

## Proposed Budget Reductions

### Supply Line Reductions

- Reduction across supply line items: \$74,200

### Administrative Restructuring

- Replace the Assistant Director position with a 0.5 FTE Dean of Students: \$109,400

#### Program Eliminations

##### Health Careers Program

- Program elimination (only three students have expressed interest for the upcoming year)
  - Salary and benefits savings: \$123,764
  - Supply line savings: \$20,880

##### Criminal Justice Program

- Program elimination (current enrollment is 6 students, with only seven students expressing interest for next year)
  - Salary and benefits savings: \$125,855
  - Supply line savings: \$16,010

#### Staffing Adjustment

- Reduce Work-Based Learning Coordinator position to 0.5 FTE: \$45,000

#### Use of Surplus Funds

- Use \$38,147 from the Surplus Reserve Fund to offset tuition

These reductions total \$515,109 and would result in a tuition rate of \$24,695 which is a 5.13% increase over the current year.

With these changes the expenditure budget for RTCC, for the 2026-2027 school year will be \$3,605,569.

**RANDOLPH TECHNICAL CAREER CENTER  
EXPENDITURES**

| Account Name                           | 2024-25<br>Budget | 2024-25<br>Actual | 2025-26<br>Budget | 2026-27<br>Draft 2 | Difference      | % Inc/(Dec)    |
|----------------------------------------|-------------------|-------------------|-------------------|--------------------|-----------------|----------------|
| <b><u>D. INSTRUCTION:</u></b>          |                   |                   |                   |                    |                 |                |
| Salaries                               | 1,061,600         | 1,077,550         | 881,664           | 860,734            | -20,930         | -2.37%         |
| Benefits                               | 500,279           | 341,072           | 391,365           | 408,969            | 17,604          | 4.50%          |
| Staff Development                      | 16,800            | 10,389            | 18,425            | 1,625              | -16,800         | -91.18%        |
| Computer Network                       | 88,995            | 88,995            | 92,000            | 92,000             | 0               | 0.00%          |
| Co/Extra Curricular                    | 61,440            | 7,952             | 64,145            | 54,145             | -10,000         | -15.59%        |
| Overhead Tuition                       | 55,000            | 0                 | 10,000            | 0                  | -10,000         | -100.00%       |
| Transportation - Other Tech Ctr        | 0                 | 0                 | 0                 | 58,000             | 58,000          |                |
| Travel/Field Trips                     | 32,230            | 5,879             | 28,560            | 10,100             | -18,460         | -64.64%        |
| Supplies/Textbooks/Equip               | 298,570           | 411,001           | 270,631           | 234,381            | -36,250         | -13.39%        |
| <b>Total Instruction</b>               | <b>2,114,914</b>  | <b>1,942,838</b>  | <b>1,756,790</b>  | <b>1,719,954</b>   | <b>-36,836</b>  | <b>-2.10%</b>  |
| <b><u>E. ADMINISTRATION:</u></b>       |                   |                   |                   |                    |                 |                |
| Salaries                               | 293,010           | 283,538           | 312,483           | 267,860            | -44,623         | -14.28%        |
| Benefits                               | 102,484           | 101,069           | 116,166           | 99,892             | -16,274         | -14.01%        |
| Contracted Svcs                        | 1,000             | 476               | 1,000             | 1,000              | 0               | 0.00%          |
| Overhead Tuition                       | 0                 | 0                 | 0                 | 0                  | 0               |                |
| Repairs/Maintenance                    | 22,525            | 6,645             | 22,555            | 22,555             | 0               | 0.00%          |
| Travel                                 | 3,000             | 1,515             | 3,000             | 3,000              | 0               | 0.00%          |
| Supplies/Equipment                     | 56,700            | 35,807            | 57,400            | 51,300             | -6,100          | -10.63%        |
| <b>Total Administration</b>            | <b>478,719</b>    | <b>429,051</b>    | <b>512,604</b>    | <b>445,607</b>     | <b>-66,997</b>  | <b>-13.07%</b> |
| <b><u>F. SUPPORT SERVICES:</u></b>     |                   |                   |                   |                    |                 |                |
| Assessment Coordinator                 | 143,837           | 96,227            | 157,305           | 176,948            | 19,643          | 12.49%         |
| Cooperative Education                  | 136,557           | 130,308           | 165,763           | 61,442             | -104,321        | -62.93%        |
| Guidance                               | 147,416           | 80,223            | 159,079           | 97,487             | -61,592         | -38.72%        |
| School Nurse                           | 62,040            | 59,736            | 68,573            | 67,186             | -1,387          | -2.02%         |
| Board of Education                     | 15,600            | 5,184             | 16,115            | 15,645             | -470            | -2.92%         |
| Legal Fees                             | 4,000             | 406               | 8,000             | 8,000              | 0               | 0.00%          |
| Fiscal Services                        | 26,000            | 0                 | 26,000            | 26,000             | 0               | 0.00%          |
| <b>Total Support Services</b>          | <b>535,450</b>    | <b>372,083</b>    | <b>600,835</b>    | <b>452,708</b>     | <b>-148,127</b> | <b>-24.65%</b> |
| <b><u>G. MAINTENANCE OF PLANT:</u></b> |                   |                   |                   |                    |                 |                |
| Salaries                               | 0                 | 0                 | 0                 | 0                  | 0               |                |
| Benefits                               | 0                 | 0                 | 0                 | 0                  | 0               |                |
| Contracted Svcs                        | 0                 | 0                 | 0                 | 0                  | 0               |                |
| General Liability Insurance            | 28,000            | 40,726            | 35,000            | 47,500             | 12,500          | 35.71%         |
| Utilities                              | 188,800           | 142,778           | 188,800           | 188,800            | 0               | 0.00%          |
| Repairs & Maintenance                  | 9,000             | 3,412             | 9,000             | 9,000              | 0               | 0.00%          |
| Supplies/Equipment                     | 0                 | 0                 | 0                 | 0                  | 0               |                |
| <b>Total Maintenance</b>               | <b>225,800</b>    | <b>186,916</b>    | <b>232,800</b>    | <b>245,300</b>     | <b>12,500</b>   | <b>5.37%</b>   |
| <b><u>SCHOOL TOTAL</u></b>             | <b>3,354,883</b>  | <b>2,930,888</b>  | <b>3,103,029</b>  | <b>2,863,569</b>   | <b>-239,460</b> | <b>-7.72%</b>  |
| H. OSSU/ADMIN/SP ED                    | 153,000           | 153,000           | 160,000           | 168,000            | 8,000           | 5.00%          |
| OSSU MAINTENANCE                       | 385,000           | 385,000           | 400,000           | 420,000            | 20,000          | 5.00%          |
| <b><u>I. ADULT ED:</u></b>             |                   |                   |                   |                    |                 |                |
| Salaries                               | 2,000             | 0                 | 2,000             | 0                  | -2,000          |                |
| Benefits                               | 184               | 0                 | 185               | 0                  | -185            |                |
| Travel                                 | 0                 | 0                 | 0                 | 0                  | 0               |                |
| Supplies/Textbooks/Equip               | 0                 | 0                 | 0                 | 0                  | 0               |                |
| <b>Total Adult Ed</b>                  | <b>2,184</b>      | <b>0</b>          | <b>2,185</b>      | <b>0</b>           | <b>-2,185</b>   |                |
| <b><u>J. DEBT SERVICE:</u></b>         |                   |                   |                   |                    |                 |                |
|                                        | 0                 | 0                 | 0                 | 0                  | 0               |                |
| <b><u>K. TUITION REFUND</u></b>        |                   |                   |                   |                    |                 |                |
|                                        | 0                 | 0                 | 0                 | 0                  | 0               |                |
| <b><u>SURPLUS/DEFICIT</u></b>          |                   |                   |                   |                    |                 |                |
|                                        | 0                 | 0                 | 0                 | 0                  | 0               |                |
| <b><u>SCHOOL TOTAL</u></b>             | <b>3,895,067</b>  | <b>3,468,888</b>  | <b>3,665,214</b>  | <b>3,451,569</b>   | <b>-213,645</b> | <b>-5.83%</b>  |
| <b><u>FEDERAL FUNDS:</u></b>           |                   |                   |                   |                    |                 |                |
| Carl Perkins                           | 154,000           | 0                 | 154,000           | 154,000            | 0               |                |
| <b>TOTAL:</b>                          | <b>4,049,067</b>  | <b>3,468,888</b>  | <b>3,819,214</b>  | <b>3,605,569</b>   | <b>-213,645</b> | <b>-5.59%</b>  |

**ORANGE SOUTHWEST SCHOOL DISTRICT  
ESTIMATE - 2026-27**

|                                       |                |
|---------------------------------------|----------------|
| <b>State Property Yield Rate</b>      | <b>\$1.00</b>  |
| <b>State Non-Residential Tax Rate</b> | <b>\$1.785</b> |

BUDGET - Proposed Draft 3 Budget \$27,976,946.00

REVENUE - Categorical Grants -\$6,031,875.00

Total Education Spending (Act 68) \$21,945,071.00

Equalized LTW Pupils -2025-26 (Projection 01-05-26) **1,412.22**

Education Spending per Equalized Pupil (Act 68) \$15,539.41

**Excess Spending Threshold** **\$16,470.00**  
**Amount Over Threshold** \$0.00

Education Spending Plus Excess Spending \$15,539.41

Property Yield \$12,582.11 \$12,582.11

**Statewide Adjustment** 70.33%

Statewide Adjusted Prop Yield \$8,849.00

**O.S.S.D. Equalized Homestead Rate** **\$1.7561**

|                   | <b>State Estimate</b>        |                        |                          |                            | <b>Projected 26-27</b>  | <b>2025-26</b>          | <b>Proj 2026-27</b>      |
|-------------------|------------------------------|------------------------|--------------------------|----------------------------|-------------------------|-------------------------|--------------------------|
|                   | <b>O.S.S.D - Est</b>         | <b>2025</b>            | <b>State</b>             | <b>Statewide</b>           |                         |                         |                          |
|                   | <b><u>Equal Tax Rate</u></b> | <b><u>Town CLA</u></b> | <b><u>CLA Adjust</u></b> | <b><u>Adjusted CLA</u></b> | <b><u>Tax Rates</u></b> | <b><u>Tax Rates</u></b> | <b><u>Difference</u></b> |
| <b>Braintree</b>  | \$1.7561                     | 62.87%                 | 70.33%                   | 89.39%                     | \$1.9644                | \$1.9254                | <b>\$0.0390</b>          |
| <b>Brookfield</b> | \$1.7561                     | 76.60%                 | 70.33%                   | 108.92%                    | \$1.6123                | \$1.5723                | <b>\$0.0400</b>          |
| <b>Randolph</b>   | \$1.7561                     | 94.93%                 | 70.33%                   | 134.98%                    | \$1.3010                | \$1.2842                | <b>\$0.0168</b>          |

**ORANGE SOUTHWEST UNIFIED UNION  
SCHOOL DISTRICT  
(ORANGE SOUTHWEST SCHOOL DISTRICT)**

**SPECIAL BOARD BUDGET INFORMATIONAL MEETING**

**THURSDAY, FEBRUARY 26<sup>TH</sup>, 2026**

**RANDOLPH UNION HIGH SCHOOL AUDITORIUM**

**@ 6:00 PM**

Following updated guidance from state agencies, and in order to comply with those directives, this meeting will also be available remotely. Please use the following:

Meeting ID

[meet.google.com/nup-dkew-oqa](https://meet.google.com/nup-dkew-oqa)

Phone Numbers

[\(US\)+1 252-397-0145](tel:(US)+1252-397-0145)

PIN: 650 984 479#

**IMPORTANT DISCUSSION BEFORE AUSTRALIAN BALLOT VOTE  
ON TOWN MEETING DAY, TUESDAY MARCH 3, 2026**

**WARNING**  
**Orange Southwest Unified Union School District**  
**(Orange Southwest School District)**  
**For Braintree, Brookfield, and Randolph**  
**ANNUAL SCHOOL DISTRICT MEETING**  
**Monday, March 2, 2026**

**TO THE LEGAL VOTERS OF RANDOLPH, BRAINTREE, and BROOKFIELD:**

You are hereby notified that the Annual Meeting of the voters of Randolph, Braintree & Brookfield will be held in the Auditorium at the Randolph Union High School in the Town of Randolph on Monday, March 4, 2026, commencing at 6:00 p.m. Following updated guidance from state agencies and in order to comply with those directives, this meeting will also be available remotely. Members of the public wishing to join the meeting remotely, please use the following link:

Meeting ID  
[meet.google.com/nup-dkew-oqa](https://meet.google.com/nup-dkew-oqa)  
Phone Numbers  
[\(US\)+1 252-397-0145](tel:(US)+12523970145)  
PIN: 650 984 479#

**NOTICE TO VOTERS: ARTICLES I, II, III, IV, V, and VI will be voted on the Floor on Monday, March 2, 2026.**

**Polls for voting on Articles VII, VIII, IX, X & XI will be open on Town Meeting Day, Tuesday, March 3, 2026 at the following locations and at the following times in each town:**

**Braintree: Braintree Town Hall from 9 a.m. to 7 p.m.**  
**Brookfield: Brookfield Elementary School from 9 a.m. to 7 p.m.**  
**Randolph: Randolph Town Hall from 7 a.m. to 7 p.m.**

- ARTICLE I: To elect a Moderator for a one-year term beginning July 1, 2026.
- ARTICLE II: To elect a Clerk for a one-year term beginning July 1, 2026.
- ARTICLE III: To elect a School District Treasurer for a one-year term beginning July 1, 2026.
- ARTICLE IV: To fill any vacancies existing or occurring on March 3, 2026.
- ARTICLE V: To hear and act upon recommendations contained in the reports of the officers of the school district.
- ARTICLE VI: To see whether the school district will authorize the School Board to borrow money pending receipt of payments from the member towns, by the issuance of notes or orders payable not later than one year from the date thereof.
- ARTICLE VII: To vote by Australian ballot on the following Orange Southwest School District Officer:  
1. - One School Director from the residents of Randolph VT for a term of three years.
- ARTICLE VIII: To vote by Australian ballot on the following Orange Southwest School District Officer:  
1. - One School Director from the residents of Brookfield VT for a term of three years.

- ARTICLE IX: To vote by Australian ballot on the following monetary item:
1. Shall the voters of the Orange Southwest School District approve the school board to expend **\$29,159,606** which is the amount the school board has determined to be necessary for the ensuing fiscal year. The Orange Southwest School District estimates that this proposed budget, if approved, will result in per pupil education spending of **\$15,339.41** which is **1.22% lower** than per pupil education spending for the current year.
- ARTICLE X: To vote by Australian ballot on the following monetary item:
1. Shall the voters of the Orange Southwest School District approve the transfer of **\$ \_\_\_\_\_** in surplus funds from the 2024-2025 school year to the Operational Reserve Fund?
- ARTICLE XI: To vote by Australian ballot on the following monetary item:
2. Shall the voters of the Orange Southwest School District approve the transfer of **\$ \_\_\_\_\_** in surplus funds from the 2024-2025 school year to the Building Reserve Fund?

DATED at Randolph in the County of Orange and State of Vermont, this \_\_\_\_ day of January 2025.

\_\_\_\_\_  
Anne Kaplan, Chair

\_\_\_\_\_  
Rachel Gaidys

\_\_\_\_\_  
Aimil Parmelee, Vice-Chair

\_\_\_\_\_  
Bevely Lauchner

\_\_\_\_\_  
Martha Hafner, Clerk

\_\_\_\_\_  
Sam Hooper

\_\_\_\_\_  
Rachel Fish

\_\_\_\_\_  
Ryan Anderson

OSSD School Board Directors

Received and recorded in the office of the Clerk of the Orange Southwest School District, in Randolph on January \_\_\_\_, 2026 before being posted.

ATTEST: \_\_\_\_\_  
Kyle Southworth, Clerk

\*\*\*\*\*

### NOTICE TO VOTERS

Attached is some basic information about the Orange Southwest School District meeting warned. If you have any questions, please contact your Town Clerk.

Braintree Town Clerk - 728-9787  
Brookfield Town Clerk - 276-3352  
Randolph Town Clerk - 728-5682

Dear Community Members,

It has been a busy and important year for our district.

Much of our time has been spent unpacking and trying to understand the potential impact of Act 73 on our district, as well as on how we should respond. With the establishment of the statewide Redistricting Task Force—charged with drawing new school district maps—we chose to be both cautious and proactive.

On the proactive side, we met this past fall with neighboring districts, including Paine Mountain, Echo Valley, and White River Valley, to better understand their perspectives, concerns, and needs; and to discuss the shared challenges we all face. On the cautious side, we held off moving forward with replacing any of our aging school buildings - two of which require a fair amount of repair work. We do not want to invest in a major bonding project only to learn later that state-driven consolidation will require us to merge with another district. To that end, until the future of our district is more clear, we will continue to maintain our infrastructure as best we can. Like many others across Vermont, we are watching closely to see what the Legislature decides in the months ahead.

This year we also encouraged our Superintendent, Michael Clark, to give students a voice regarding their vision for the future of education in Vermont. Act 73 had no formal mechanism for students to share their thoughts and perspectives. To address this deficiency, Superintendent Clark partnered with Up for Learning and brought together a group of students from area districts to discuss their vision for the future of education. UP for Learning is an organization that helps educational institutions fully engage youth in their own learning and in reimagining and transforming education. As their work progresses, these students will have the opportunity to testify before the Legislature, and hopefully have an impact on the future of education here in Vermont.

We are also exploring the possibility of adding student representation to the school board. This idea has surfaced before, and remains of strong interest. Our next steps include developing a clear process: defining the role students would play on the board; communicating the expectations; identifying interested students; and determining a fair method of selection. The VT School Boards Association (VSBA) has provided resources on this topic, and we are also considering connecting with a national organization that supports student participation on school boards. We believe student input will be both essential, and beneficial, as we lead the district into the future.

In other achievements, the Board completed a full update and revision of our Ends policies, which we have now officially accepted. These policies have evolved considerably since they were first created more than a decade ago. The next step will be to work with our administrators to determine how they will meet the outcomes outlined in the Ends. We look forward to sharing this information with the community as the work unfolds.

As we began looking at the budget for the upcoming year, we wanted to be sensitive to the cost increases —across the board— that our taxpayers are facing. As we all know, there was a substantial increase in the statewide education property tax last year, driven in part by rising property values. As we began this year's budget development, we were committed to being as transparent as possible about our process and timeline and we encouraged the public to attend our meetings and participate in our deliberations. It is our hope that this year's proposed budget reflects not only what our schools need to educate our children, but also what our taxpayers have told us they can support. Although some of the cost increases we are looking at are outside our control —especially state mandated out-of-school placements— we believe the budget we are presenting is supportable and sustainable.

On a more personal note, we navigated a few changes in Board leadership this year. We said goodbye to our Board Chair, Hannah Arias, at the end of last summer and appointed Beverly Lauchner of Randolph to fill her seat. Anne Kaplan stepped into the role of Board Chair. We are grateful for Hannah's time, effort, dedication, and leadership over the years.

As we look to the coming year(s), much still remains uncertain. We will not know the full implications of Act 73 until the Legislature returns in January and continues its work on education reform. To that end, and like many districts, we find ourselves in a bit of a holding pattern. We do not want to commit to major projects —especially those requiring significant funding— without clarity about the state's direction, yet we must continue fulfilling our fundamental responsibility to educate our children. Our newly revised Ends policies will guide this work and help shape our priorities in the year to come.

It is both an honor and a privilege to serve on your School Board. We invite you to join our meetings, share your perspectives, and stay engaged in the decisions that shape our schools. As always, we remain committed to providing the best possible education for your children and preparing them for the next stages of their lives.

For the Board,

Anne Kaplan

# Monitoring Report

|                                          |                       |                             |                                      |
|------------------------------------------|-----------------------|-----------------------------|--------------------------------------|
| <b>Superintendent Monitoring Report:</b> | Internal              | <b>Organization:</b>        | Orange Southwest School District     |
| <b>Policy Type:</b>                      | Executive Limitations | <b>Policy Number/Title:</b> | 2.4 Financial Planning and Budgeting |
| <b>Submitted on:</b>                     | 8 December 2025       | <b>Period Covered</b>       | November 2024 -December 2025         |

## Policy

*The Superintendent shall not cause or allow financial planning for any fiscal year or the remaining part of any fiscal year to deviate materially from the board's Ends priorities, risk financial jeopardy, or fail to be derived from a multiyear plan.*

*Further, without limiting the scope of the foregoing by this enumeration, there will be no financial plans that:*

- 1. Risk incurring those situations or conditions described as unacceptable in the board policy "Financial Condition and Activities"*
- 2. Omit credible projection of revenues and expenses, separation of capital and operational items, cash flow, and disclosure of planning assumptions*
- 3. Provide less for board prerogatives during the year than is set forth in the Governance Investment Policy*
- 4. Omit disclosure of anticipated impact(s) of proposed budget.*

## Interpretation

I interpret the intent of the overall policy to mean that district funds shall be purposefully allocated to advance the board's ENDS, with a clear focus on achieving those outcomes. Furthermore, these funds will be protected through sound fiscal management practices. Finally, I interpret compliance with the policy to signify that all specified provisions are being met in full.

Including:

- That available funds within the most recent budget shall not be exceeded.
- That the district's liabilities will be paid promptly and without delay.
- That monies owed to the district will be collected in a timely manner.
- That unexpected revenues will be directed toward supporting the district's

ENDS. Estimates of revenues and expenses used to create the annual budget are grounded in reason and supported by evidence.

- That financial statements provide sufficient detail to distinguish between the resources necessary for the district's daily operations in pursuit of the Board's ENDS and those allocated to individual projects that require significant investment, such as building projects.
- That the approved budget will allocate sufficient resources to support the board's reasonable interpretation of Governance Process Policy 4.7
- That the superintendent will keep the board informed of any significant changes in the financial landscape that may impact or alter the budget planning process or the current budget.

## Observable Conditions:

|    |                                                                                                                                           |
|----|-------------------------------------------------------------------------------------------------------------------------------------------|
| a) | Administration will prepare a line by line budget.                                                                                        |
| b) | The community will approve a top line expenditure budget amount.                                                                          |
| c) | Regular warrants are prepared and approved by the board detailing timely payment of bills.                                                |
| d) | The board receives regular detailed financial statements and summaries which reflect the information the board needs.                     |
| e) | The superintendent will create regular board reports which keep the board informed of any significant changes in the financial landscape. |

## Rationale:

|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1) | An organization that aims to achieve its goals can only do so when it intentionally allocates resources toward meeting those Ends. Effective fiscal management practices are essential to ensure that funds, which could be directed toward advancing the Ends, are not squandered due to incompetence or inefficiency. The primary purpose of financial planning and budgeting is to guarantee that the organization has the necessary resources to fulfill its goals and meet its mandated obligations. |
| 2) | The limitations outlined in Policy 2.3 (Financial Conditions and Activities) are designed to ensure that the OSSD practices sound and responsible financial stewardship. These provisions guarantee that the organization meets its financial obligations in a timely manner and that spending is consistently aligned with the achievement of the Board's Ends.                                                                                                                                          |

|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3) | To ensure adequate and reliable funding in support of the board's ENDS, the district budget must be developed based on evidence-driven assumptions regarding future revenues and expenses. Furthermore, to demonstrate that district priorities are accurately reflected in financial decisions, the budget creation process must clearly articulate the purpose behind any changes made from one fiscal year to the next.                                             |
| 4) | Providing and reviewing information about the changing financial landscape as soon as it becomes available enables a thoughtful and informed response, potentially mitigating any negative effects these changes may have on the district or its ability to meet its Ends. Additionally, if the changes prove beneficial, advanced notice allows the district the opportunity to seek community input and strategically direct their impact toward achieving the Ends. |

## Evidence:

| Observable Condition                  | Data/Result                                                                          |
|---------------------------------------|--------------------------------------------------------------------------------------|
| a) Line by Line Budget                | <i>The board is provided a line by line detailed budget</i>                          |
| b) Top Line Budget Expenditure amount | <i>This information is included in the Annual Warning, Ballot, and results</i>       |
| c) Warrants                           | <i>The board approves accounts payable warrants at each regular board meeting</i>    |
| d) Financial Statements               | <i>The board reviews detailed financial statements at each regular board meeting</i> |
| e) Superintendent updates             | <i>The board receives and reviews a monthly superintendent's report</i>              |

## Compliance:

I report compliance with this policy. *Michael J. Clark, Superintendent*

Notes:

# Monitoring Report

|                                          |                       |                             |                                         |
|------------------------------------------|-----------------------|-----------------------------|-----------------------------------------|
| <b>Superintendent Monitoring Report:</b> | Internal              | <b>Organization:</b>        | Orange Southwest School District        |
| <b>Policy Type:</b>                      | Executive Limitations | <b>Policy Number/Title:</b> | 2.5 Emergency Superintendent Succession |
| <b>Submitted on:</b>                     | 8 December 2025       | <b>Period Covered</b>       | November 2024-December 2025             |

## Policy

*To protect the district from the sudden loss of Superintendent services, the Superintendent shall not permit the administrative cabinet to be unprepared to take over with reasonable proficiency until a successor is found.*

## Interpretation

The district will adopt a distributed model of leadership which ensures as a team the cabinet will be able to ensure with a good degree of competence that the OSSD is able to operate efficiently until a replacement is named. The cabinet must be kept informed of ongoing matters and initiatives, enabling them to fulfill the superintendent's role seamlessly and with minimal disruption. Specific individuals will be thoroughly cross-trained in various responsibilities of the superintendency, ensuring as a team they are well-versed in the full scope of duties.

## Observable Conditions:

|    |                                                                                                                                                                                                                                                                                                                                              |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| a) | The Org Chart has oversight responsibilities for all major areas of operations including                                                                                                                                                                                                                                                     |
| b) | Department and Building leads are regularly be mentored by the superintendent                                                                                                                                                                                                                                                                |
| c) | Department and Building Leads Increased responsibility of reporting on the ends                                                                                                                                                                                                                                                              |
| d) | The Administrative Assistant to the Superintendent is knowledgeable about all major initiatives before the Superintendent and maintains a thorough understanding of his schedule. Additionally, she is able to direct individuals to appropriate resources or personnel when matters do not require the Superintendent's direct involvement. |

## Rationale:

|    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1) | To ensure the district continues to achieve its ENDS on behalf of students and the communities it serves, it is essential to establish contingencies that are activated in the event of an unexpected loss. Given that the district relies on its staff to fulfill its mission, it is critical to engage in cross-training initiatives. These efforts will safeguard the organization's integrity and functionality by ensuring that the sudden absence of any individual's knowledge or skills does not disrupt the district's ability to meet its objectives. |
| 2) | Succession planning is not only a mechanism for ensuring the district operates smoothly during an unexpected transition; it is also a strategic investment in building capacity and expertise within the administrative team. Over time, the ongoing training and communication foster the development of a strong, shared vision and a unified organizational culture. This process promotes consistency, clarity of purpose, and enhances collegiality, ultimately strengthening the leadership and direction of the district.                                |

## Evidence:

| Observable Condition                                                                                                                 | Data/Result                                                                                                                                                                                                                                                                                                                                                     |
|--------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| a) Department and Building Leads Hired                                                                                               | <i>Updated Org Chart</i>                                                                                                                                                                                                                                                                                                                                        |
| b) Regular Operations, Cabinet and Curriculum Meetings<br><br>And<br><br>Individual Department and Building Level Mentoring meetings | <p><i>Operations meetings are brief meetings held every Monday at 1:00 p.m. to highlight the week ahead.</i></p> <p><i>Curriculum Meetings are held every Wednesday from 9:00-10:30 and cover more indepth</i></p> <p><i>Individual Department and Building Level Mentoring meetings occur both at regularly scheduled times and on an as needed basis.</i></p> |
| c) Ends Snapshot                                                                                                                     | <i>This year the Department and Building Leads have specific responsibilities to report on ends progress</i>                                                                                                                                                                                                                                                    |

|                                                |                                                                                                                                                         |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| d) Knowledge of calendar and Major initiatives | <i>The Administrative Assistant maintains the Superintendent's daily calendar, as well as a schedule of major upcoming events and required actions.</i> |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|

## Compliance:

I hereby report partial compliance with this policy. Please see notes for a more full explanation.

*Michael J. Clark, Superintendent*

### Notes:

#### **Explanation of partial compliance**

The elimination of the Assistant Superintendent position has added complexity to succession planning in the event that an emergency replacement of the Superintendent is required.

Department and building leaders are fully capable of managing the day-to-day operations of the OSSD, and many of our administrators are highly experienced. When unfamiliar situations arise, they have strong mentoring networks they can rely on for guidance. I am confident that, in an emergency, a successful transition could occur.

However, this monitoring report highlights the need for a more formalized and pre-arranged plan to guide our response in the event of a catastrophic emergency. I propose working with the Cabinet to develop such a plan for the Board's review at its February meeting, with an interim update included in my Superintendent's Report at the January meeting

#### **Procedure for Temporarily Delegating the Superintendent's Authority**

This procedure should be followed in such cases where a superintendent is unable to perform his/her responsibilities. This may occur in a transition period between superintendents or for other reasons such as accident or illness. Under these circumstances, that authority temporarily may be delegated by the OSSD board to another licensed administrator within the district using the following process:

1. The OSSD Board should formally take action (vote) to temporarily delegate the superintendent's signatory authority to another licensed administrator within the district. This delegation may be general or limited to specific types of documents.
2. The current superintendent or chair of the OSSD board should submit notification via email to the secretary of education outlining the name and license type of the individual the board wishes to designate as the interim signatory authority for the district, the scope of that authority, and the start and end date of that authority.
3. The secretary will ensure relevant Agency of Education (AOE) divisions and teams are notified of the change, and that AOE's Grants Management System (GMS) is updated

accordingly.

4. When the temporary signatory authority designation is no longer needed, or if it needs to be extended beyond the original request, the OSSD board chair or superintendent should email the secretary of education notification of the change. The secretary will follow the same process as item three (3) above in informing relevant parties within the AOE.

# ORANGE SOUTHWEST SCHOOL DISTRICT - REVENUE

| Account Name                        | 2024-25<br>Actual | December 2024<br>Revenue | 2025-26<br>Budget | December 2025<br>Revenue | Under<br>(Over)    |
|-------------------------------------|-------------------|--------------------------|-------------------|--------------------------|--------------------|
| <b><u>LOCAL REVENUES:</u></b>       |                   |                          |                   |                          |                    |
| Tuition                             | 401,801           | 20,037                   | 370,000           | 133,109                  | -236,891           |
| Overhead Tuition                    | 0                 | 0                        | 5,000             | 0                        | -5,000             |
| Transportation                      | 104,262           | 15,864                   | 40,000            | 31,971                   | -8,029             |
| Interest                            | 168,922           | 64,824                   | 75,000            | 69,005                   | -5,995             |
| Early Ed Receipts                   | 500               | 0                        | 0                 | 0                        | 0                  |
| Lease Land - Brookfield             | 0                 | 0                        | 0                 | 0                        | 0                  |
| Secretary of State - Town Meeting   | 0                 | 0                        | 0                 | 0                        | 0                  |
| Contracted Services                 | 0                 | 0                        | 0                 | 0                        | 0                  |
| OSSU - Maint & Tech Contracted Svc  | 0                 | 0                        | 0                 | 0                        | 0                  |
| RTCC - Shared Services              | 626,995           | 0                        | 652,000           | 163,000                  | -489,000           |
| Admin Svcs - EPSDT                  | 0                 | 0                        | 0                 | 0                        | 0                  |
| Admin Svcs - VIP                    | 0                 | 0                        | 0                 | 0                        | 0                  |
| Admin Svcs - RAVEN                  | 47,650            | 0                        | 47,650            | 0                        | -47,650            |
| Rental Income                       | 0                 | 0                        | 0                 | 0                        | 0                  |
| SWP - Salary Reimb                  | 0                 | 0                        | 0                 | 0                        | 0                  |
| Prior Year Refunds                  | 4,618             | 4,618                    | 0                 | 0                        | 0                  |
| Total Other Revenues:               | 1,354,748         | 105,344                  | 1,189,650         | 397,085                  | -792,565           |
| <b><u>SPECIAL ED:</u></b>           |                   |                          |                   |                          |                    |
| Core Block Grant                    | 0                 | 0                        | 0                 | 0                        | 0                  |
| Special Ed Reimbursement            | 1,798,682         | 1,199,122                | 1,850,859         | 1,232,166                | -618,693           |
| State Placed Students               | 41,816            | -205                     | 0                 | 57,343                   | 57,343             |
| Extraordinary Reimbursement         | 660,143           | -1                       | 1,029,400         | 811                      | -1,028,589         |
| Essential Early Ed                  | 95,353            | 95,353                   | 95,353            | 89,636                   | -5,717             |
| IDEA-B - Pre-School                 | 0                 | 0                        | 0                 | 0                        | 0                  |
| IDEA-B                              | 0                 | 0                        | 0                 | 0                        | 0                  |
| Excess Costs Reimbursement          | 20,505            | 0                        | 15,000            | -230                     | -15,230            |
| Total Special Ed                    | 2,616,499         | 1,294,269                | 2,990,612         | 1,379,726                | -1,610,886         |
| <b><u>STATE REVENUES:</u></b>       |                   |                          |                   |                          |                    |
| State Technical Centers             | 627,121           | 0                        | 560,420           | 0                        | -560,420           |
| State Education Fund                | 19,528,184        | 11,140,718               | 21,214,722        | 10,717,214               | -10,497,508        |
| ELL Categorical Grant               | 50,000            | 50,000                   | 50,000            | 50,000                   | 0                  |
| State Unenrolled Residents at Tech  | 18,639            | 0                        | 0                 | 0                        | 0                  |
| State Placed Students - Reg Tuition | 0                 | 0                        | 0                 | 4,973                    | 4,973              |
| State Transportation                | 281,652           | 0                        | 255,000           | 0                        | -255,000           |
| Small Schools Grant                 | 177,706           | 118,471                  | 177,706           | 118,471                  | -59,235            |
| Driver Education                    | 8,590             | 2,298                    | 3,500             | 0                        | -3,500             |
| Total State Revenues                | 20,691,892        | 11,311,487               | 22,261,348        | 10,890,658               | -11,370,690        |
| BEGINNING BALANCE:                  | 1,033,333         | 1,033,333                | 703,333           | 703,333                  | 0                  |
| <b>SCHOOL TOTAL:</b>                | <b>25,696,472</b> | <b>13,744,434</b>        | <b>27,144,943</b> | <b>13,370,802</b>        | <b>-13,774,141</b> |
| <b><u>FEDERAL FUNDS:</u></b>        |                   |                          |                   |                          |                    |
| IDEA - B                            | 0                 | 0                        | 329,400           | 0                        | -329,400           |
| IDEA - B - PreSchool                | 0                 | 0                        | 6,800             | 0                        | -6,800             |
| Title I and II - School Wide        | 0                 | 0                        | 680,960           | 0                        | -680,960           |
| Medicaid                            | 0                 | 0                        | 155,000           | 0                        | -155,000           |
| EPSDT                               | 0                 | 0                        | 10,500            | 0                        | -10,500            |
| Total Federal Funds                 | 0                 | 0                        | 1,182,660         | 0                        | -1,182,660         |

## ORANGE SOUTHWEST SCHOOL DISTRICT - REVENUE

|                              |                   |                   |                   |                   |                    |
|------------------------------|-------------------|-------------------|-------------------|-------------------|--------------------|
| <b>TOTAL VOTER APPROVAL:</b> | <b>25,696,472</b> | <b>13,744,434</b> | <b>28,327,603</b> | <b>13,370,802</b> | <b>-14,956,801</b> |
|------------------------------|-------------------|-------------------|-------------------|-------------------|--------------------|

**ORANGE SOUTHWEST SCHOOL DISTRICT -  
EXPENDITURES**

| Account Name                     | 2024-25<br>Actual | December 2024<br>Expenditure | 2025-26<br>Budget | December 2025<br>Expenditure | Encumb           | Balance<br>Under<br>(Over) | Percent<br>Inc/Dec |
|----------------------------------|-------------------|------------------------------|-------------------|------------------------------|------------------|----------------------------|--------------------|
| <b><u>INSTRUCTION:</u></b>       |                   |                              |                   |                              |                  |                            |                    |
| Salaries                         | 5,082,570         | 1,916,647                    | 5,611,830         | 2,005,483                    | 0                | 3,606,347                  | 64.26%             |
| Benefits                         | 1,746,726         | 550,786                      | 2,212,209         | 572,154                      | 0                | 1,640,055                  | 74.14%             |
| Drivers Education                | 0                 | 892                          | 4,000             | 0                            | 0                | 4,000                      | 100.00%            |
| Remedial/Interventionist Service | 295,262           | 105,914                      | 455,272           | 100,171                      | 0                | 355,101                    | 78.00%             |
| Testing/Tutorial/OT-PT Svcs      | 34,718            | 10,665                       | 47,560            | 6,743                        | 6,127            | 34,690                     | 72.94%             |
| Contracted Services              | 39,535            | 31,611                       | 48,250            | 34,811                       | 180              | 13,259                     | 27.48%             |
| Staff Training                   | 148,808           | 64,889                       | 278,730           | 63,445                       | 29,119           | 186,166                    | 66.79%             |
| Co/Extra Curricular              | 470,048           | 161,866                      | 541,536           | 186,039                      | 86,750           | 268,747                    | 49.63%             |
| Tuition                          | 102,719           | 0                            | 58,000            | 870                          | 18,000           | 39,130                     | 67.47%             |
| Travel/Field Trips               | 8,083             | 6,715                        | 26,400            | 6,658                        | 6,357            | 13,385                     | 50.70%             |
| Supplies/Textbooks/Equip         | 318,870           | 116,554                      | 433,523           | 122,584                      | 39,679           | 271,260                    | 62.57%             |
| <b>Total Instruction</b>         | <b>8,247,339</b>  | <b>2,966,539</b>             | <b>9,717,310</b>  | <b>3,098,961</b>             | <b>186,212</b>   | <b>6,432,138</b>           | <b>66.19%</b>      |
| <b><u>SPECIAL EDUCATION:</u></b> |                   |                              |                   |                              |                  |                            |                    |
| Salaries                         | 1,637,092         | 730,897                      | 2,087,862         | 696,267                      | 0                | 1,391,595                  | 66.65%             |
| Benefits                         | 634,533           | 217,801                      | 1,006,270         | 232,221                      | 0                | 774,049                    | 76.92%             |
| Contracted/Prof Services         | 30,804            | 0                            | 0                 | 5,152                        | 15,598           | -20,750                    |                    |
| Transportation                   | 261,849           | 1,557                        | 252,275           | 48,800                       | 19,922           | 183,553                    | 72.76%             |
| Travel/Conferences               | 21,639            | 12,858                       | 12,800            | 1,838                        | 2,703            | 8,259                      | 64.52%             |
| Supplies/Textbooks/Equipment     | 17,927            | 26,514                       | 28,520            | 21,788                       | 10,872           | -4,139                     | -14.51%            |
| Tuition                          | 840,570           | 277,262                      | 1,189,000         | 411,075                      | 723,712          | 54,213                     | 4.56%              |
| Behavioral Services              | 204,746           | 70,489                       | 226,211           | 78,935                       | 372              | 146,904                    | 64.94%             |
| Testing/Tutorial/OT-PT Svcs      | 262,879           | 112,327                      | 144,000           | 68,289                       | 190,446          | -114,735                   | -79.68%            |
| Speech Services                  | 316,142           | 105,462                      | 392,039           | 129,162                      | 43,759           | 219,118                    | 55.89%             |
| <b>Total Special Education</b>   | <b>4,228,182</b>  | <b>1,555,167</b>             | <b>5,338,977</b>  | <b>1,693,526</b>             | <b>1,007,384</b> | <b>2,638,067</b>           | <b>49.41%</b>      |
| <b><u>ADMINISTRATION:</u></b>    |                   |                              |                   |                              |                  |                            |                    |
| Salaries                         | 1,061,637         | 534,938                      | 1,122,282         | 526,986                      | 0                | 595,296                    | 53.04%             |
| Benefits                         | 416,746           | 181,805                      | 547,402           | 176,434                      | 0                | 370,968                    | 67.77%             |
| Repairs/Maint                    | 255               | 255                          | 9,000             | 0                            | 0                | 9,000                      | 100.00%            |
| Postage/Telephone                | 35,565            | 16,712                       | 39,750            | 14,333                       | 962              | 24,456                     | 61.52%             |
| Travel                           | 26,455            | 18,999                       | 14,100            | 7,111                        | 3,741            | 3,248                      | 23.03%             |
| Supplies/Equipment               | 52,009            | 15,515                       | 55,815            | 11,842                       | 7,449            | 36,524                     | 65.44%             |
| <b>Total Administration</b>      | <b>1,592,667</b>  | <b>768,224</b>               | <b>1,788,349</b>  | <b>736,706</b>               | <b>12,152</b>    | <b>1,039,491</b>           | <b>58.13%</b>      |
| <b><u>CENTRAL OFFICE:</u></b>    |                   |                              |                   |                              |                  |                            |                    |
| Salaries                         | 743,493           | 393,023                      | 713,922           | 359,120                      | 0                | 354,802                    | 49.70%             |
| Benefits                         | 257,657           | 116,917                      | 340,022           | 123,461                      | 0                | 216,561                    | 63.69%             |
| Contracted Services              | 8,057             | 0                            | 10,000            | 250                          | 5,500            | 4,250                      | 42.50%             |
| Legal Fees                       | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Staff Development                | 11,651            | 9,648                        | 7,500             | 1,847                        | 818              | 4,835                      | 64.47%             |
| Repairs/Maintenance              | 24,180            | 24,180                       | 30,000            | 25,389                       | 0                | 4,611                      | 15.37%             |
| Board Expense                    | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Building Construction            | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Insurance                        | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Travel                           | 7,112             | 1,583                        | 13,900            | 1,049                        | 194              | 12,657                     | 91.06%             |
| Supplies/Equipment               | 42,126            | 25,815                       | 64,350            | 21,742                       | 11,327           | 31,281                     | 48.61%             |
| <b>Total Central Office</b>      | <b>1,094,277</b>  | <b>571,166</b>               | <b>1,179,694</b>  | <b>532,857</b>               | <b>17,840</b>    | <b>628,997</b>             | <b>53.32%</b>      |
| <b><u>SUPPORT SERVICES:</u></b>  |                   |                              |                   |                              |                  |                            |                    |
| Guidance                         | 742,463           | 214,911                      | 664,975           | 227,913                      | 14,404           | 422,659                    | 63.56%             |
| Behavioral Interventionists      | 343,590           | 127,598                      | 383,110           | 135,282                      | 421              | 247,407                    | 64.58%             |
| School Nurse                     | 476,043           | 168,155                      | 383,647           | 127,992                      | 301              | 255,354                    | 66.56%             |
| Media Services                   | 381,278           | 151,605                      | 358,437           | 143,887                      | 3,153            | 211,398                    | 58.98%             |
| Curriculum Develop               | 12,977            | 12,977                       | 31,310            | 7,657                        | 7,766            | 15,887                     | 50.74%             |
| C.A.R.                           | 47,992            | 9,149                        | 113,500           | 3,647                        | 2,184            | 107,669                    | 94.86%             |
| Teacher Mentoring                | 33,487            | 13,998                       | 58,010            | 13,998                       | 12,250           | 31,762                     | 54.75%             |
| Board of Education               | 92,517            | 188,281                      | 123,450           | 221,574                      | 11,288           | -109,412                   | -88.63%            |
| Legal Fees                       | 42,870            | 7,061                        | 64,500            | 6,284                        | 0                | 58,217                     | 90.26%             |
| Fiscal Services                  | 0                 | 0                            | 85,000            | 0                            | 0                | 85,000                     | 100.00%            |
| <b>Total Support Services</b>    | <b>2,173,217</b>  | <b>893,736</b>               | <b>2,265,939</b>  | <b>888,232</b>               | <b>51,767</b>    | <b>1,325,940</b>           | <b>58.52%</b>      |
| <b><u>MAINTENANCE:</u></b>       |                   |                              |                   |                              |                  |                            |                    |
| Salaries                         | 852,328           | 418,648                      | 856,950           | 417,206                      | 0                | 439,744                    | 51.31%             |
| Benefits                         | 383,982           | 146,428                      | 523,880           | 161,562                      | 0                | 362,318                    | 69.16%             |
| Contracted Services              | 520,351           | 152,214                      | 235,531           | 89,456                       | 133,979          | 12,096                     | 5.14%              |
| General Liability Ins            | 94,929            | 0                            | 98,500            | 105,829                      | 0                | -7,329                     | -7.44%             |
| Repairs/Maintenance              | 102,586           | 64,300                       | 287,260           | 62,632                       | 81,530           | 143,098                    | 49.81%             |
| Utilities                        | 435,651           | 118,821                      | 564,200           | 120,345                      | 250              | 443,605                    | 78.63%             |
| Supplies/Travel/Equipment        | 202,917           | 90,014                       | 353,400           | 61,318                       | 37,574           | 254,509                    | 72.02%             |
| Care of Grounds                  | 215,128           | 50,439                       | 224,200           | 55,232                       | 47,730           | 121,238                    | 54.08%             |
| Reserve - Repairs/Maint          | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Vehicle Services                 | 13,574            | 7,633                        | 30,485            | 2,514                        | 4,170            | 23,801                     | 78.07%             |
| <b>Total Maintenance Svcs</b>    | <b>2,821,446</b>  | <b>1,048,496</b>             | <b>3,174,406</b>  | <b>1,076,093</b>             | <b>305,233</b>   | <b>1,793,079</b>           | <b>56.49%</b>      |

**ORANGE SOUTHWEST SCHOOL DISTRICT -  
EXPENDITURES**

|                                    | 2024-25<br>Actual | December 2024<br>Expenditure | 2025-26<br>Budget | December 2025<br>Expenditure | Encumb           | Balance<br>Under<br>(Over) | Percent<br>Inc/Dec |
|------------------------------------|-------------------|------------------------------|-------------------|------------------------------|------------------|----------------------------|--------------------|
| <b><u>TECHNOLOGY:</u></b>          |                   |                              |                   |                              |                  |                            |                    |
| Salaries                           | 325,002           | 175,218                      | 384,024           | 185,691                      | 0                | 198,333                    | 51.65%             |
| Benefits                           | 123,421           | 56,616                       | 202,499           | 57,108                       | 0                | 145,391                    | 71.80%             |
| Contracted Services                | 19,539            | 1,560                        | 24,500            | 2,910                        | 580              | 21,010                     | 85.76%             |
| Technology Fund Transfer           | 108,500           | 0                            | 108,500           | 0                            | 0                | 108,500                    | 100.00%            |
| Repairs/Maintenance                | 453               | 279                          | 2,500             | 0                            | 0                | 2,500                      | 100.00%            |
| Supplies                           | 156,901           | 73,734                       | 151,450           | 133,364                      | 3,029            | 15,057                     | 9.94%              |
| Equipment                          | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| <b>Total Technology</b>            | <b>733,816</b>    | <b>307,407</b>               | <b>873,473</b>    | <b>379,073</b>               | <b>3,609</b>     | <b>490,791</b>             | <b>56.19%</b>      |
| <b><u>TRANSPORTATION:</u></b>      |                   |                              |                   |                              |                  |                            |                    |
| Salaries                           | 302,319           | 155,138                      | 324,750           | 142,816                      | 0                | 181,934                    | 56.02%             |
| Benefits                           | 55,921            | 21,842                       | 76,783            | 21,993                       | 0                | 54,790                     | 71.36%             |
| Contracted Svcs/Rent               | 68,014            | 48,498                       | 73,000            | 43,531                       | 0                | 29,469                     | 40.37%             |
| Travel/Conferences                 | 0                 | 0                            | 100               | 0                            | 0                | 100                        | 100.00%            |
| Repairs/Supplies/Equip             | 76,647            | 23,037                       | 69,250            | 45,838                       | 6,000            | 17,412                     | 25.14%             |
| Diesel Fuel                        | 55,601            | 13,136                       | 92,000            | 20,096                       | 0                | 71,904                     | 78.16%             |
| Unallowed Spec Ed                  | 2,734             | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| After School Bus                   | 2,462             | 704                          | 0                 | 0                            | 0                | 0                          |                    |
| Field Trips                        | 25,056            | 2,946                        | 32,830            | 6,347                        | 3,340            | 23,143                     | 70.49%             |
| Tuition Student Transportation     | 43,779            | 16,837                       | 31,125            | 15,431                       | 10,099           | 5,596                      | 17.98%             |
| Bus Fund Reserve                   | 100,000           | 0                            | 100,000           | 0                            | 0                | 100,000                    | 100.00%            |
| <b>Total Transportation</b>        | <b>732,534</b>    | <b>282,138</b>               | <b>799,838</b>    | <b>296,052</b>               | <b>19,438</b>    | <b>484,348</b>             | <b>60.56%</b>      |
| <b><u>OTHER EXPENDITURES:</u></b>  |                   |                              |                   |                              |                  |                            |                    |
| Food Service Transfer              | 138,443           | 0                            | 70,000            | 0                            | 0                | 70,000                     | 100.00%            |
| Operational Fund Transfer          | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Special Ed Transfer                | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Child Care - COVID-19              | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| Debt Service                       | 9,754             | 9,588                        | 10,050            | 9,774                        | 0                | 276                        | 2.74%              |
| EEE Services                       | 67,748            | 23,820                       | 95,353            | 17,254                       | 0                | 78,099                     | 81.91%             |
| <b>Total Other Expenditures</b>    | <b>215,945</b>    | <b>33,408</b>                | <b>175,403</b>    | <b>27,028</b>                | <b>0</b>         | <b>148,375</b>             | <b>84.59%</b>      |
| <b><u>TECHNICAL EDUCATION:</u></b> |                   |                              |                   |                              |                  |                            |                    |
| State - Act 68                     | 627,121           | 0                            | 560,420           | 0                            | 0                | 560,420                    | 100.00%            |
| Local Tuition                      | 663,498           | 658,592                      | 634,500           | 643,939                      | 0                | -9,439                     | -1.68%             |
| <b>Total Tech Education</b>        | <b>1,290,619</b>  | <b>658,592</b>               | <b>1,194,920</b>  | <b>643,939</b>               | <b>0</b>         | <b>550,981</b>             | <b>46.11%</b>      |
| <b><u>PRE-SCHOOL</u></b>           |                   |                              |                   |                              |                  |                            |                    |
| Salaries                           | 418,276           | 170,459                      | 337,262           | 133,619                      | 0                | 203,643                    | 60.38%             |
| Benefits                           | 178,535           | 58,849                       | 198,722           | 59,270                       | 0                | 139,452                    | 70.17%             |
| Administration                     | 26,904            | 14,571                       | 0                 | 0                            | 0                | 0                          |                    |
| Tuition/Partnerships               | 26,633            | 11,362                       | 82,000            | 6,606                        | 13,311           | 62,083                     | 75.71%             |
| Supplies/Travel/Equip              | 21,363            | 14,504                       | 18,650            | 6,751                        | 7,823            | 4,076                      | 21.86%             |
| <b>Total Pre-School</b>            | <b>671,711</b>    | <b>269,746</b>               | <b>636,634</b>    | <b>206,246</b>               | <b>21,134</b>    | <b>409,254</b>             | <b>64.28%</b>      |
| SUPRLUS/DEFICIT                    | 0                 | 0                            | 0                 | 0                            | 0                | 0                          |                    |
| <b><u>SCHOOL TOTAL:</u></b>        | <b>23,801,751</b> | <b>9,354,619</b>             | <b>27,144,943</b> | <b>9,578,713</b>             | <b>1,624,769</b> | <b>15,941,460</b>          | <b>58.73%</b>      |
| <b><u>FEDERAL FUNDS:</u></b>       |                   |                              |                   |                              |                  |                            |                    |
| IDEA - B                           | 0                 | 0                            | 329,400           | 0                            | 0                | 329,400                    |                    |
| IDEA - B - PreSchool               | 0                 | 0                            | 6,800             | 0                            | 0                | 6,800                      |                    |
| Title I and II - School Wide       | 0                 | 0                            | 680,960           | 0                            | 0                | 680,960                    |                    |
| Medicaid                           | 0                 | 0                            | 155,000           | 0                            | 0                | 155,000                    |                    |
| EPSDT                              | 0                 | 0                            | 10,500            | 0                            | 0                | 10,500                     |                    |
| <b>Total Federal Funds</b>         | <b>0</b>          | <b>0</b>                     | <b>1,182,660</b>  | <b>0</b>                     | <b>0</b>         | <b>1,182,660</b>           |                    |
| <b>TOTAL VOTER APPROVAL:</b>       | <b>23,801,751</b> | <b>9,354,619</b>             | <b>28,327,603</b> | <b>9,578,713</b>             | <b>1,624,769</b> | <b>17,124,120</b>          | <b>60.45%</b>      |

**ORANGE SOUTHWEST SCHOOL DISTRICT  
2025-26 SUMMARY**

|                           | 2024-25<br>ACTUAL | DECEMBER 2024<br>YTD | 2025-26<br>BUDGET | DECEMBER 2025<br>YTD | DIFFERENCE         |
|---------------------------|-------------------|----------------------|-------------------|----------------------|--------------------|
| <b>GENERAL FUND</b>       |                   |                      |                   |                      |                    |
| <b>REVENUE:</b>           |                   |                      |                   |                      |                    |
| LOCAL REVENUE             | 1,354,748         | 105,344              | 1,189,650         | 397,085              | -792,565           |
| SPECIAL PROGRAMS          | 2,616,499         | 1,294,269            | 2,990,612         | 1,379,726            | -1,610,886         |
| STATE REVENUES            | 20,691,892        | 11,311,487           | 22,261,348        | 10,890,658           | -11,370,690        |
| BEGINNING BALANCE:        | 1,033,333         | 1,033,333            | 703,333           | 703,333              | 0                  |
| <b>TOTAL REVENUE</b>      | <b>25,696,472</b> | <b>13,744,434</b>    | <b>27,144,943</b> | <b>13,370,802</b>    | <b>-13,774,141</b> |
| <b>EXPENDITURES:</b>      |                   |                      |                   |                      |                    |
| INSTRUCTION               | 8,247,339         | 2,966,539            | 9,717,310         | 3,098,961            | 6,618,349          |
| SPECIAL EDUCATION         | 4,228,182         | 1,555,167            | 5,338,977         | 1,693,526            | 3,645,451          |
| ADMINISTRATION            | 1,592,667         | 768,224              | 1,788,349         | 736,706              | 1,051,643          |
| CENTRAL OFFICE            | 1,094,277         | 571,166              | 1,179,694         | 532,857              | 646,837            |
| SUPPORT SERVICES          | 2,173,217         | 893,736              | 2,265,939         | 888,232              | 1,377,707          |
| MAINTENANCE               | 2,821,446         | 1,048,496            | 3,174,406         | 1,076,093            | 2,098,313          |
| TECHNOLOGY                | 733,816           | 307,407              | 873,473           | 379,073              | 494,400            |
| TRANSPORTATION            | 732,534           | 282,138              | 799,838           | 296,052              | 503,786            |
| OTHER EXPENSES            | 215,945           | 33,408               | 175,403           | 27,028               | 148,375            |
| TECHNICAL EDUCATION       | 1,290,619         | 658,592              | 1,194,920         | 643,939              | 550,981            |
| PRE-SCHOOL                | 671,711           | 269,746              | 636,634           | 206,246              | 430,388            |
| <b>SCHOOL TOTAL:</b>      | <b>23,801,751</b> | <b>9,354,619</b>     | <b>27,144,943</b> | <b>9,578,713</b>     | <b>17,566,230</b>  |
| SURPLUS/DEFICIT           | 0                 | 0                    | 0                 | 0                    | 0                  |
| <b>TOTAL EXPENDITURES</b> | <b>23,801,751</b> | <b>9,354,619</b>     | <b>27,144,943</b> | <b>9,578,713</b>     | <b>17,566,230</b>  |

|                          |                  |                  |                  |                  |
|--------------------------|------------------|------------------|------------------|------------------|
|                          | 7/1/2025         |                  |                  |                  |
| <b>OTHER FUNDS</b>       | <b>BEG BAL</b>   | <b>REVENUE</b>   | <b>EXPENDED</b>  | <b>BALANCE</b>   |
| TRANSFER FUND            | 474,677          | 94,013           | 365,919          | 202,771          |
| TITLE 1                  | 40               | 81,042           | 76,917           | 4,166            |
| EPSDT FUNDS              | 127,415          | 15,628           | 7,904            | 135,140          |
| FOOD SERVICE             | -21,759          | 154,698          | 256,632          | -123,693         |
| FRESH FRUITS & VEGS      | -4,298           | 0                | 0                | -4,298           |
| MEDICAID FUNDS           | 788,350          | 16,275           | 44,616           | 760,009          |
| R.A.V.E.N.               | 53,549           | 164,691          | 52,155           | 166,086          |
| IDEA-B - FLOW-THROUGH    | 0                | 123,929          | 123,929          | 0                |
| IDEA-B - PRE-SCHOOL      | 0                | 2,029            | 2,029            | 0                |
| VEHICLE/BUS FUND         | 965,014          | 0                | 0                | 965,014          |
| BUILDING MAINT FUND      | 1,446,348        | 970,400          | 111,510          | 2,305,238        |
| LEGAL FUND               | 140,000          | 0                | 0                | 140,000          |
| SPECIAL EDUCATION FUND   | 515,697          | 0                | 0                | 515,697          |
| OPERATIONAL RESERVE      | 678,304          | 1,200,000        | 703,333          | 1,174,971        |
| TECHNOLOGY RESERVE       | 325,500          | 0                | 0                | 325,500          |
| ESSENTIAL EARLY ED       | 43,426           | 0                | 0                | 43,426           |
| AFTER SCHOOL PROGRAM     | 69,950           | 38,142           | 2,597            | 105,495          |
| STANDARDS BOARD          | 0                | 0                | 0                | 0                |
| SUMMER FEEDING           | 24,530           | 39,706           | 19,727           | 44,510           |
| SCHOOL WIDE PROGRAMS     | 0                | 110,623          | 131,860          | -21,237          |
| TITLE II                 | 0                | 28,072           | 25,524           | 2,548            |
| TITLE IV                 | 0                | 24,658           | 21,047           | 3,610            |
| CONSOLIDATED ADMIN       | 0                | 2,500            | 2,500            | 0                |
| CRF - LEA GRANT          | 10,348           | 0                | 0                | 10,348           |
| ARP - ESSER SUMMER       | 0                | -5,322           | 0                | -5,322           |
| ARP - ESSER              | 0                | 0                | 0                | 0                |
| ARP - AFTERSCHOOL        | 159              | -12,301          | 7                | -12,149          |
| ARP - PRESCHOOL          | 3,547            | 0                | 0                | 3,547            |
| <b>TOTAL OTHER FUNDS</b> | <b>5,640,799</b> | <b>3,048,783</b> | <b>1,948,205</b> | <b>6,741,376</b> |

**RANDOLPH TECHNICAL CAREER CENTER  
REVENUE**

| <b>Account Name</b>              | <b>2024-25<br/>Actual</b> | <b>December 2024<br/>Revenue</b> | <b>2025-26<br/>Budget</b> | <b>December 2025<br/>Revenue</b> | <b>\$ Inc/Dec</b> |
|----------------------------------|---------------------------|----------------------------------|---------------------------|----------------------------------|-------------------|
| <b><u>A. STATE REVENUE:</u></b>  |                           |                                  |                           |                                  |                   |
| General State Support Grant      | 1,522,001                 | 1,014,668                        | 1,390,079                 | 926,720                          | -463,359          |
| Overhead Support                 | 612,282                   | 306,141                          | 559,260                   | 288,333                          | -270,927          |
| Technical Ed - Transportation    | 0                         | 0                                | 0                         | 22,936                           | 22,936            |
| Program Innovation Grant         | 0                         | 0                                | 0                         | 0                                | 0                 |
| Adult Ed                         | 0                         | 0                                | 0                         | 0                                | 0                 |
| Coop Salary Reimb                | 27,895                    | 27,895                           | 32,000                    | 35,450                           | 3,450             |
| Guidance Salary Reimb            | 28,900                    | 28,900                           | 30,000                    | 30,717                           | 717               |
| Director Salary Reimb            | 65,898                    | 65,898                           | 65,000                    | 71,173                           | 6,173             |
| Adult Coord Salary Reimb         | 0                         | 0                                | 0                         | 0                                | 0                 |
| Carl Perkins                     | 0                         | 0                                | 0                         | 0                                | 0                 |
| Total State Revenue:             | 2,256,975                 | 1,443,501                        | 2,076,339                 | 1,375,329                        | -701,010          |
| <b><u>B. OTHER REVENUES:</u></b> |                           |                                  |                           |                                  |                   |
| Adult Ed Services                | 0                         | 0                                | 2,184                     | 0                                | -2,184            |
| Tuition                          | 1,626,458                 | 647,814                          | 1,572,741                 | 958,492                          | -614,249          |
| Tuition - Other Sources          | 0                         | 0                                | 0                         | 0                                | 0                 |
| Interest                         | 11,762                    | 7,205                            | 5,000                     | 20                               | -4,980            |
| Services to Other Districts      | 0                         | 0                                | 0                         | 0                                | 0                 |
| Maintenance Reimb - VIP          | 0                         | 0                                | 0                         | 0                                | 0                 |
| Overhead Costs - RAVEN           | 8,950                     | 0                                | 8,950                     | 0                                | -8,950            |
| Prior Year Refunds               | 0                         | 0                                | 0                         | 0                                | 0                 |
| Total Other Revenues:            | 1,647,171                 | 655,019                          | 1,588,875                 | 958,512                          | -630,363          |
| <b><u>C. SURPLUS/DEFICIT</u></b> | 783,335                   | 783,335                          | 0                         | 783,335                          | 783,335           |
| <b>SCHOOL TOTAL:</b>             | <b>4,687,482</b>          | <b>2,881,856</b>                 | <b>3,665,214</b>          | <b>3,117,176</b>                 | <b>-548,038</b>   |

**RANDOLPH TECHNICAL CAREER CENTER  
EXPENDITURES**

| Account Name                           | 2024-25<br>Actual | December 2024<br>Expenditure | 2025-26<br>Budget | December 2025<br>Expenditure | Encumb         | Difference       |
|----------------------------------------|-------------------|------------------------------|-------------------|------------------------------|----------------|------------------|
| <b><u>D. INSTRUCTION:</u></b>          |                   |                              |                   |                              |                |                  |
| Salaries                               | 1,075,662         | 445,490                      | 881,664           | 311,967                      | 0              | 569,697          |
| Benefits                               | 340,919           | 113,696                      | 391,365           | 113,557                      | 0              | 277,808          |
| Staff Development                      | 10,389            | 5,382                        | 18,425            | 4,206                        | 2,095          | 12,124           |
| Computer Network                       | 88,995            | 0                            | 92,000            | 23,000                       | 0              | 69,000           |
| Co/Extra Curricular                    | 7,952             | 670                          | 64,145            | 1,150                        | 850            | 62,145           |
| Overhead Tuition                       | 0                 | 0                            | 10,000            | 0                            | 0              | 10,000           |
| Carl Perkins                           | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| Travel/Field Trips                     | 5,879             | -1,690                       | 28,560            | 2,605                        | 2,163          | 23,793           |
| Transportation - Other Tech Ctr        | 0                 | 0                            | 0                 | 7,496                        | 44,554         | -52,050          |
| Supplies/Textbooks/Equip               | 395,150           | 85,075                       | 270,631           | 87,473                       | 33,292         | 149,866          |
| <b>Total Instruction</b>               | <b>1,924,947</b>  | <b>648,623</b>               | <b>1,756,790</b>  | <b>551,453</b>               | <b>82,954</b>  | <b>1,122,382</b> |
| <b><u>E. ADMINISTRATION:</u></b>       |                   |                              |                   |                              |                |                  |
| Salaries                               | 283,538           | 151,617                      | 312,483           | 156,902                      | 0              | 155,581          |
| Benefits                               | 101,069           | 40,137                       | 116,166           | 49,245                       | 0              | 66,921           |
| Contracted Svcs                        | 476               | 0                            | 1,000             | 151                          | 490            | 358              |
| Overhead Tuition                       | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| Repairs/Maintenance                    | 6,645             | 6,484                        | 22,555            | 5,057                        | 5,428          | 12,070           |
| Travel                                 | 1,515             | 1,469                        | 3,000             | 0                            | 0              | 3,000            |
| Supplies/Equipment                     | 35,807            | 17,933                       | 57,400            | 10,686                       | 8,576          | 38,138           |
| <b>Total Administration</b>            | <b>429,051</b>    | <b>217,640</b>               | <b>512,604</b>    | <b>222,041</b>               | <b>14,494</b>  | <b>276,069</b>   |
| <b><u>F. SUPPORT SERVICES:</u></b>     |                   |                              |                   |                              |                |                  |
| Assessment Coordinator                 | 96,227            | 34,835                       | 157,305           | 55,433                       | 56,378         | 45,493           |
| Cooperative Education                  | 130,308           | 49,712                       | 165,763           | 14,889                       | 150            | 150,724          |
| Guidance                               | 80,223            | 31,313                       | 159,079           | 39,405                       | 0              | 119,674          |
| School Nurse                           | 59,736            | 20,942                       | 68,573            | 20,508                       | 33,897         | 14,168           |
| Board of Education                     | 5,184             | 1,002                        | 16,115            | 10,787                       | 0              | 5,328            |
| Legal Fees                             | 406               | 406                          | 8,000             | 0                            | 0              | 8,000            |
| Fiscal Services                        | 0                 | 0                            | 26,000            | 0                            | 0              | 26,000           |
| <b>Total Support Services</b>          | <b>372,083</b>    | <b>138,210</b>               | <b>600,835</b>    | <b>141,022</b>               | <b>90,426</b>  | <b>369,387</b>   |
| <b><u>G. MAINTENANCE OF PLANT:</u></b> |                   |                              |                   |                              |                |                  |
| Salaries                               | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| Benefits                               | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| Contracted Svcs                        | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| General Liability Insurance            | 40,726            | 0                            | 35,000            | 47,156                       | 0              | -12,156          |
| Utilities                              | 142,778           | 36,354                       | 188,800           | 34,751                       | 0              | 154,049          |
| Repairs & Maintenance                  | 3,412             | 0                            | 9,000             | 0                            | 0              | 9,000            |
| Supplies/Equipment                     | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| <b>Total Maintenance</b>               | <b>186,916</b>    | <b>36,354</b>                | <b>232,800</b>    | <b>81,907</b>                | <b>0</b>       | <b>150,893</b>   |
| <b><u>SCHOOL TOTAL</u></b>             | <b>2,912,997</b>  | <b>1,040,827</b>             | <b>3,103,029</b>  | <b>996,424</b>               | <b>187,874</b> | <b>1,918,731</b> |
| <b>H. OSSU/ADMIN/SP ED</b>             | <b>153,000</b>    | <b>0</b>                     | <b>160,000</b>    | <b>40,000</b>                | <b>0</b>       | <b>120,000</b>   |
| <b>OSSU MAINTENANCE</b>                | <b>385,000</b>    | <b>0</b>                     | <b>400,000</b>    | <b>100,000</b>               | <b>0</b>       | <b>300,000</b>   |
| <b><u>I. ADULT ED:</u></b>             |                   |                              |                   |                              |                |                  |
| Salaries                               | 0                 | 0                            | 2,000             | 0                            | 0              | 2,000            |
| Benefits                               | 0                 | 0                            | 185               | 0                            | 0              | 185              |
| Travel                                 | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| Supplies/Textbooks/Equip               | 0                 | 0                            | 0                 | 0                            | 0              | 0                |
| <b>Total Adult Ed</b>                  | <b>0</b>          | <b>0</b>                     | <b>2,185</b>      | <b>0</b>                     | <b>0</b>       | <b>2,185</b>     |
| <b>J. DEBT SERVICE:</b>                | <b>0</b>          | <b>0</b>                     | <b>0</b>          | <b>0</b>                     | <b>0</b>       | <b>0</b>         |
| <b>K. TUITION REFUND</b>               | <b>0</b>          | <b>0</b>                     | <b>0</b>          | <b>0</b>                     | <b>0</b>       | <b>0</b>         |
| <b><u>SURPLUS/DEFICIT</u></b>          | <b>0</b>          | <b>0</b>                     | <b>0</b>          | <b>0</b>                     | <b>0</b>       | <b>0</b>         |
| <b><u>TOTAL</u></b>                    | <b>3,450,997</b>  | <b>1,040,827</b>             | <b>3,665,214</b>  | <b>1,136,424</b>             | <b>187,874</b> | <b>2,340,916</b> |

**RANDOLPH TECHNICAL CAREER CENTER  
2025-26 FINANCIAL SUMMARY**

|                       | 2024-25<br>ACTUAL | DECEMBER 2024<br>YTD | 2025-26<br>BUDGET | DECEMBER 2025<br>YTD | BALANCE         | % BAL          |
|-----------------------|-------------------|----------------------|-------------------|----------------------|-----------------|----------------|
| <b>1 GENERAL FUND</b> |                   |                      |                   |                      |                 |                |
| A. STATE REVENUES     | 2,256,975         | 1,443,501            | 2,076,339         | 1,375,329            | -701,010        | -33.76%        |
| B. OTHER REVENUES     | 1,647,171         | 655,019              | 1,588,875         | 958,512              | -630,363        | -39.67%        |
| C. SURPLUS/DEFICIT    | 783,335           | 783,335              | 0                 | 783,335              | 783,335         |                |
| <b>TOTAL REVENUE</b>  | <b>4,687,482</b>  | <b>2,881,856</b>     | <b>3,665,214</b>  | <b>3,117,176</b>     | <b>-548,038</b> | <b>-14.95%</b> |

**EXPENDITURES:**

|                           |                  |                  |                  |                  |                  |               |
|---------------------------|------------------|------------------|------------------|------------------|------------------|---------------|
| D. INSTRUCTION            | 1,924,947        | 648,623          | 1,756,790        | 551,453          | 1,205,337        | 68.61%        |
| E. ADMINISTRATION         | 429,051          | 217,640          | 512,604          | 222,041          | 290,563          | 56.68%        |
| F. SUPPORT SERVICES       | 372,083          | 138,210          | 600,835          | 141,022          | 459,813          | 76.53%        |
| G. MAINTENANCE OF PLANT   | 186,916          | 36,354           | 232,800          | 81,907           | 150,893          | 64.82%        |
| <b>SCHOOL TOTAL:</b>      | <b>2,912,997</b> | <b>1,040,827</b> | <b>3,103,029</b> | <b>996,424</b>   | <b>2,106,605</b> | <b>67.89%</b> |
| H. OSSU/ADMIN/MAINT       | 538,000          | 0                | 560,000          | 140,000          | 420,000          | 75.00%        |
| I. ADULT EDUCATION        | 0                | 0                | 2,185            | 0                | 2,185            | 100.00%       |
| J. DEBT SERVICE           | 0                | 0                | 0                | 0                | 0                |               |
| K. TUITION REFUND         | 0                | 0                | 0                | 0                | 0                |               |
| SURPLUS/DEFICIT           | 0                | 0                | 0                | 0                | 0                |               |
| <b>TOTAL EXPENDITURES</b> | <b>3,450,997</b> | <b>1,040,827</b> | <b>3,665,214</b> | <b>1,136,424</b> | <b>2,528,790</b> | <b>68.99%</b> |

|                                | 7/1/2025<br>BEG BAL | REVENUE       | EXPENDED      | BALANCE      |
|--------------------------------|---------------------|---------------|---------------|--------------|
| <b>2 TECH GRANTS</b>           | 6,795               | 35,875        | 35,875        | 6,795        |
| <b>3 TRANSFERS</b>             | 800                 | 0             | 0             | 800          |
| <b>4 CARL PERKINS</b>          | 0                   | 9             | 1,837         | -1,828       |
| <b>5 GEER II - ROUND 3</b>     | 0                   | 0             | 0             | 0            |
| <b>6 VACTED</b>                | 28,237              | 0             | 28,237        | 0            |
| <b>7 VACTED - PERKINS</b>      | 0                   | 0             | 0             | 0            |
| <b>8 ADULT ED - DEPT LABOR</b> | 0                   | 0             | 0             | 0            |
| <b>9 ADULT ED EVENING</b>      | -1,736              | 0             | 0             | -1,736       |
| <b>TOTAL:</b>                  | <b>34,096</b>       | <b>35,884</b> | <b>65,949</b> | <b>4,031</b> |

Orange Southwest School District  
**POLICY GOVERNING**  
**FINGERPRINT-BASED CRIMINAL HISTORY RECORD INFORMATION (CHRI)**  
**CHECKS MADE FOR NON-CRIMINAL JUSTICE PURPOSES**

This policy is applicable to any fingerprint-based state and national criminal history record check made for non-criminal justice purposes and requested under applicable federal authority and/or state statute authorizing such checks for Orange Southwest Supervisory Union (OSSD) purposes. Where such checks are allowable by law, the following practices and procedures will be followed.

**I. Requesting CHRI checks**

Fingerprint-based CHRI checks will only be conducted as authorized by the FBI and Vermont Crime Information Center (VCIC), in accordance with all applicable state and federal rules and regulations. If an applicant or employee is required to submit to a fingerprint-based state and national criminal history record check, they shall be informed of this requirement and instructed on how to comply with the law. Such instruction will include information on the procedure for submitting fingerprints. In addition, the applicant or employee will be provided with all information needed to successfully register for a fingerprinting appointment.

**II. Access to CHRI**

All CHRI is subject to strict state and federal rules and regulations. CHRI is used only for the official purpose for which it was requested, and CHRI cannot be shared with other entities for any purpose, including subsequent hiring determinations. All receiving entities are subject to audit by the VCIC and the FBI, and failure to comply with such rules and regulations could lead to sanctions. Furthermore, an entity can be charged with federal and state crimes for the willful, unauthorized disclosure of CHRI.

**III. CHRI Training**

An informed review of a criminal record requires training. Accordingly, all personnel authorized to receive and/or review CHRI at OSSD will review and become familiar with the educational and relevant training materials regarding CHRI laws and regulations made available by the appropriate agencies.

In addition to the above, all personnel authorized to receive and/or review CHRI must undergo Security Awareness Training on an annual basis. This training will be accomplished using the training provided by CJIS Online.

#### **IV. Adverse Decisions Based on CHRI**

If inclined to make an adverse decision based on an individual's CHRI, OSSD will take the following steps prior to making a final adverse determination:

- Provide the individual the opportunity to complete or challenge the accuracy of his/her CHRI; and
- Provide the individual with information on the process for updating, changing, or correcting CHRI.

A final adverse decision based on an individual's CHRI will not be made until the individual has been afforded a reasonable time of 15 days to correct or complete the CHRI.

#### **V. Point of Contact (POC) and Local Agency Security Officer (LASO)**

Each NCJA receiving CHRI is required to designate a POC and a LASO.

The OSSD POC is Kyle Southworth. The POC is responsible for the following:

- Ensuring all authorized personnel
  - Complete the appropriate level of CJIS Security Awareness Training in CJIS Online
  - Sign an Acknowledgement Statement of Misuse
- Inform the VCIC of changes in the agency head or any relevant business information (agency name changes, mailing/physical address changes, etc.)
  - Contact the VCIC immediately to update the User Agreement and, if necessary, submit the new authorization to the VCIC

The OSSD LASO is Kyle Southworth. The LASO is responsible for the following:

- Identifying who is using or accessing CHRI and/or systems with access to CHRI
- Ensuring that personnel security screening procedures are being followed as stated in this policy
- Ensuring the approved and appropriate security measures are in place and working as expected
- Terminate access to CHRI immediately upon notification of an individual's termination of employment

## **VI. Retention of CHRI**

Federal law prohibits the repurposing or dissemination of CHRI beyond its initial requested purpose. Once an individual's CHRI is received, it will be securely retained in internal agency documents for the following purposes only:

- Historical reference and/or comparison with future CHRI requests
- Dispute of the accuracy of the record
- Evidence for any subsequent proceedings based on information contained in the CHRI.

CHRI will be kept for the above purposes in:

- Hard copy form in personnel files located in the locked filing cabinet located in the locked filing room
  - CHRI will be retained for the (3) years. At the end of this term, the CHRI will be disposed of according to the Disposal of Physical Media policy

- **Storage of CHRI**

CHRI shall only be stored for extended periods of time when needed for the integrity and/or utility of an individual's personnel file. Administrative, technical, and physical safeguards, which are in compliance with the most recent FBI security Policy, have been implemented to ensure the security and confidentiality of CHRI. Each individual involved in the handling of CHRI is to familiarize himself/herself with these safeguards.

In addition to the above, each individual involved in the handling of CHRI will strictly adhere to the policy on the storage and destruction of CHRI.

## **VIII. Media/Physical Protection**

All media containing CHRI is to be protected and secured at all times. The following is established and to be implemented to ensure the appropriate security, handling, transporting, and storing of CHRI media in all its forms.

### *Physical Storage and Access*

Physical CHRI media shall be securely stored within physically secured locations or controlled areas. Access to such media is restricted to authorized personnel only and shall be secured at all times when not in use or under the supervision of an authorized individual.

Physical CHRI media: background check results will be stored in locked cabinets in a secure office. Cabinets will remain locked unless the contents are being worked with. Documents will be held for a period of three years before being destroyed.

## **IX. Destruction of CHRI**

### *Disposal of Physical Media*

Once physical CHRI media (paper/hard copies) is determined to be no longer needed by OSSD, it shall be destroyed and disposed of appropriately. Physical CHRI media shall be destroyed by shredding, cross-cut shredding, or incineration. OSSD will ensure such destruction is witnessed or carried out by authorized personnel:

- The LASO shall witness or conduct disposal
- Cross-cut shredding will be the method of destruction used by OSSD

## **X. Disciplinary**

If an individual at OSSD has misused or is currently misusing CHRI, the following requirements will be adhered to.

- Using CHRI for any purpose other than what is allowed by state statute or Federal code is considered misuse
- The specific steps your agency will take in the event intentional misuse is discovered
- Misuse of CHRI can result in loss of access to CHRI, loss of employment and/or criminal prosecution
- Misuse of CHRI shall be reported to the state

## **XI. Incident Response**

The security of information and systems in general, and of CHRI in particular, is a top priority for OSSD. Therefore, we have established appropriate operational incident handling procedures for instances of an information security breach. It is each individual's responsibility to adhere to established security guidelines and policies and to be attentive to situations and incidents which pose risks to security. Furthermore, it is each individual's responsibility to immediately report potential or actual security incidents to minimize any breach of security or loss of information. The following security incident handling procedures must be followed by each individual:

- All incidents will be reported directly to the LASO as soon as practical
- If any records were stolen, the incident will also be reported to appropriate authorities

- Once the cause of the breach has been determined, disciplinary measures will be taken in accordance with the disciplinary policy

In addition to the above, the LASO shall report all security-related incidents to the VCIC as soon as practical and submit an incident response form.

All agency personnel with access to FBI and/or VCIC CHRI have a duty to protect the system and related systems from physical and environmental damage and are responsible for correct use, operation, care and maintenance of the information. All existing laws and OSSD regulations and policies apply, including those that may apply to personal conduct. Misuse or failure to secure any information resources may result in temporary or permanent restriction of all privileges up to employment termination.

*Date Warned: Jan 14, 2026 -- First Read*

*Date Adopted:*

## **POLICY B2: VOLUNTEERS AND WORK STUDY STUDENTS**

The OSSD recognizes the valuable contributions made to the schools by volunteers and work study students. Appropriate supervision of volunteers and work study students will enhance their contributions as well as fulfill the responsibility that the school district has for the education and safety of its students.

**Definitions:** For purposes of this policy and administrative rules and procedures developed pursuant to this policy:

1. **Volunteer** means an individual not employed by the school district who works on an occasional or regular basis in the school setting to assist the staff. A volunteer works without compensation or economic benefits.
2. **Work Study Student** means a post-secondary student who receives compensation for work performed at a school operated by the district as part of a work experience program sponsored or provided by the college or university at which he or she is enrolled. A student working toward a teaching credential who is placed as a student teacher at a district school is not a work study student.

**Policy:** The superintendent shall develop administrative rules and procedures to ensure that volunteers and work study students are appropriately screened prior to entering into service in the school district, and that only volunteers and work study students who have been screened and approved by the superintendent have unsupervised contact with students. The screening process utilized by the school district shall minimally include a name and birth date check with the Vermont Internet Sex Offender Registry for any person being considered for service as a work study student. A person who is on the Vermont Internet Sex Offender Registry shall not be eligible to be a work study student.

*Date Warned:*

*Jan 14, 2026 -- First Read*

*Date Adopted:*

*April 13<sup>th</sup> 2020*

*Legal Reference(s):*

*16 V.S.A. § 260*

## **POLICY C10: PREVENTION OF HARASSMENT, HAZING AND BULLYING (POLICY)**

### **Policy Statement**

The Orange Southwest School District is committed to providing all of its students with a safe and supportive school environment in which all members of the school community are treated with respect.

It is the policy of the District to prohibit unlawful harassment of students based on race, color, religion, creed, national origin, marital status, sex, sexual orientation, gender identity or disability. Harassment may also constitute a violation of Vermont's Public Accommodations Act, Title VI of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973, Title II of the Americans with Disabilities Act of 1990, the Age Discrimination Act of 1975, and/or Title IX of the Federal Education Amendments of 1972.

It is also the policy of the District to prohibit the unlawful hazing and bullying of students. Conduct which constitutes hazing may be subject to civil penalties.

The District shall address all complaints of harassment, hazing and bullying according to the procedures accompanying this policy, and shall take appropriate action against any person - subject to the jurisdiction of the board - who violates this policy. Nothing herein shall be construed to prohibit punishment of a student for conduct which, although it does not rise to the level of harassment, bullying, or hazing as defined herein, otherwise violates one or more of the board's disciplinary policies or the school's code of conduct.

The Procedures are expressly incorporated by reference as though fully included within this Policy. The Procedures are separated from the policy for ease of use as may be required.

### **Implementation**

The Superintendent or her/his designee shall:

1. Adopt a procedure, directing staff, parents and guardians how to report violations of this policy and file complaints under this policy. (See Procedures on the Prevention of Harassment, Hazing and Bullying of Students)
2. Annually, select two or more designated employees to receive complaints of hazing, bullying and/or harassment at each school campus and publicize their availability in any publication of the District that sets forth the comprehensive rules, procedures, and standards of conduct for the school.
3. Designate an Equity Coordinator to oversee all aspects of the

implementation of this policy as it relates to obligations imposed by federal law regarding discrimination. This role may be also be assigned to one or both of the Designated Employees.

4. Respond to notifications of possible violations of this policy in order to promptly and effectively address all complaints of hazing, harassment, and/or bullying.
5. Take action on substantiated complaints. In cases where hazing, harassment and/ or bullying is substantiated, the District shall take prompt and appropriate remedial action reasonably calculated to stop the hazing, harassment and/or bullying; prevent its recurrence; and to remedy the impact of the offending conduct on the victim(s), where appropriate. Such action may include a wide range of responses from education to serious discipline. Serious discipline may include termination for employees and, for students, expulsion or removal from school property. It may also involve penalties or sanctions for both organizations and individuals who engage in hazing. Revocation or suspension of an organization's permission to operate or exist within the District's purview may also be considered if that organization knowingly permits, authorizes or condones hazing.

### **Constitutionally Protected Speech**

It is the intent of the District to apply and enforce this policy in a manner that is consistent with student rights to free expression under the First Amendment of the U.S. Constitution. The purpose of this policy is to (1) prohibit conduct or communication that is directed at a person's protected characteristics as defined below and that has the purpose or effect of substantially disrupting the educational learning process and/or access to educational resources or creates a hostile learning environment; (2) prohibit conduct intended to ridicule, humiliate or intimidate students in a manner as defined under this policy.

### **Definitions**

For the purposes of this policy and the accompanying procedures, the following definitions apply:

- A. **"Bullying"** means any overt act or combination of acts, including an act conducted by electronic means, directed against a student by another student or group of students and which:
  - a. Is repeated over time;
  - b. Is intended to ridicule, humiliate, or intimidate the student; and
  - c. (i) occurs during the school day on school property, on a school bus, or at a school-sponsored activity, or before or after the school day on a school bus or at a school sponsored activity; or

- d. (ii) does not occur during the school day on school property, on a school bus or at a school sponsored activity and can be shown to pose a clear and substantial interference with another student's right to access educational programs.
- B. **"Complaint"** means an oral or written report information provided by a student or any person to an employee alleging that a student has been subjected to conduct that may rise to the level of hazing, harassment or bullying.
- C. **"Complainant"** means a student who has provided oral or written information about conduct that may rise to the level of hazing, harassment or bullying, or a student who is the target of alleged hazing, harassment or bullying.
- D. **"Designated employee"** means an employee who has been designated by the school to receive complaints of hazing, harassment and bullying pursuant to subdivision 16 V.S.A. 570a(a)(7). The designated employees for each school building are identified in Appendix A of this policy.
- E. **"Employee"** includes any person employed directly by or retained through a contract with the District, an agent of the school, a school board member, a student teacher, an intern or a school volunteer. For purposes of this policy, "agent of the school" includes school district staff.
- F. **"Equity Coordinator"** is the person responsible for implementation of Title IX (regarding sex - based discrimination) and Title VI (regarding race - based discrimination) for the District and for coordinating the District's compliance with Title IX and Title VI in all areas covered by the implementing regulations. The Equity Coordinator is also responsible for overseeing implementation of the District's Preventing and Responding to Harassment of Students and Harassment of Employees policies. This role may also be assigned to Designated Employees.
- G. **"Harassment"** means an incident or incidents of verbal, written, visual, or physical conduct, including any incident conducted by electronic means, based on or motivated by a student's or a student's family member's actual or perceived race, creed, color, national origin, marital status, disability, sex, sexual orientation, or gender identity, that has the purpose or effect of objectively and substantially undermining and detracting from or interfering with a student's educational performance or access to school

resources or creating an objectively intimidating hostile, or offensive environment. Harassment includes conduct as defined above and may also constitute one or more of the following:

- (1) Sexual harassment, which means unwelcome conduct of a sexual nature, that includes sexual violence/sexual assault, sexual advances, requests for sexual favors, and other verbal, written, visual or physical conduct of a sexual nature, and includes situations when one or both of the following occur:
  - a. Submission to that conduct is made either explicitly or implicitly a term or condition of a student's education, academic status, or progress; or
  - b. Submission to or rejection of such conduct by a student is used as a component of the basis for decisions affecting that student.

Sexual harassment may also include student – on - student conduct or conduct of a non - employee third party that creates a hostile environment. A hostile environment exists where the harassing conduct is severe, persistent or pervasive so as to deny or limit the student's ability to participate in or benefit from the educational program on the basis of sex.

- (2) Racial harassment, which means conduct directed at the characteristics of a student's or a student's family member's actual or perceived race or color, and includes the use of epithets, stereotypes, racial slurs, comments, insults, derogatory remarks, gestures, threats, graffiti, display, or circulation of written or visual material, and taunts on manner of speech and negative references to cultural customs.
- (3) Harassment of members of other protected categories, means conduct directed at the characteristics of a student's or a student's family member's actual or perceived creed, national origin, marital status, disability, sex, sexual orientation, or gender identity and includes the use of epithets, stereotypes, slurs, comments, insults, derogatory remarks, gestures, threats, graffiti, display, or circulation of written or visual material, taunts on manner of speech, and negative references to customs related to any of these protected categories.

H. **“Hazing”** means any intentional, knowing or reckless act committed by a

student, whether individually or in concert with others, against another student: In connection with pledging, being initiated into, affiliating with, holding office in, or maintaining membership in any organization which is affiliated with the educational institution; and (1) Which is intended to have the effect of or should reasonably be expected to have the effect of endangering the mental or physical health of the student.

Hazing shall not include any activity or conduct that furthers legitimate curricular, extra - curricular, or military training program goals, provided that:

- (1) The goals are approved by the educational institution; and
- (2) The activity or conduct furthers the goals in a manner that is appropriate, contemplated by the educational institution, and normal and customary for similar programs at other educational institutions.

With respect to Hazing, “Student” means any person who:

- (A) is registered in or in attendance at an educational institution;
- (B) has been accepted for admission at the educational institution where the hazing incident occurs; or
- (C) intends to attend an educational institution during any of its regular sessions after an official academic break.

- I. **“Notice”** means a written complaint or oral information that hazing, harassment or bullying may have occurred which has been provided to a designated employee from another employee, the student allegedly subjected to the hazing, harassment or bullying, another student, a parent or guardian, or any other individual who has reasonable cause to believe the alleged conduct may have occurred. If the school learns of possible hazing, harassment or bullying through other means, for example, if information about hazing, harassment or bullying is received from a third party (such as from a witness to an incident or an anonymous letter or telephone call), different factors will affect the school’s response. These factors include the source and nature of the information; the seriousness of the alleged incident; the specificity of the information; the objectivity and credibility of the source of the report; whether any individuals can be identified who were subjected to the alleged harassment; and whether those individuals want to pursue the matter. In addition, for purposes of violations of federal anti-discrimination laws, notice may occur when an employee of the district, including any individual who a student could reasonably believe has this authority or responsibility, knows or in the

exercise of reasonable care should have known about potential unlawful harassment or bullying.

- J. **“Organization”** means a fraternity, sorority, athletic team, association, corporation, order, society, corps, cooperative, club, or other similar group, whose members primarily are students at an educational institution, and which is affiliated with the educational institution.
- K. **“Pledging”** means any action or activity related to becoming a member of an organization.
- L. **“Retaliation”** is any adverse action by any person against a person who has filed a complaint of harassment, hazing or bullying or against a person who assists or participates in an investigation, proceeding or hearing related to the harassment complaint. Such adverse action may include conduct by a school employee directed at a student in the form of intimidation or reprisal such as diminishment of grades, suspension, expulsion, change in educational conditions, loss of privileges or benefits, or other unwarranted disciplinary action. Retaliation may also include conduct by a student directed at another student in the form of further harassment, intimidation, and reprisal.
- M. **“School administrator”** means a superintendent, principal or his/her designee assistant principal//technical center director or his/her designee and/or the District’s Equity Coordinator.
- N. **“Student Conduct Form”** is a form used by students, staff, or parents, to provide, in written form, information about inappropriate student behaviors that may constitute hazing, harassment and/or bullying.

## **APPENDIX A**

### **Equity Coordinators:**

Robin Pembroke, Chief Financial Officer  
(802) 728-5052  
[rpembroke@orangesouthwest.org](mailto:rpembroke@orangesouthwest.org)

**Designated Employees:**

The following employees have been designated by the District to receive complaints of bullying and/or harassment pursuant to this policy and 16 V.S.A § 570a(a)(7) and 16 V.S.A. §570c(7) and under federal discrimination laws;

**Orange Southwest School District**

Kayla Link: Director of Special Education (802) 728-5052

[klink@orangesouthwest.org](mailto:klink@orangesouthwest.org)

**Randolph Elementary School**

Melinda Robinson. (802) 728-9555

[mrobinson@orangesouthwest.org](mailto:mrobinson@orangesouthwest.org)

**Braintree Elementary School**

Dan Morrison. Principal. (802) 728-9373

[dmorrison@orangesouthwest.org](mailto:dmorrison@orangesouthwest.org)

**Brookfield School**

Principal. (802) 276-3153

**Randolph Union High School**

Kara Merrill, School Counsellor. (802) 728-3397

[kmerrill@orangesouthwest.org](mailto:kmerrill@orangesouthwest.org)

**Randolph Technical Career Center**

Nika Oakes, Director, (802) 728-9595

[noakes@orangesouthwest.org](mailto:noakes@orangesouthwest.org)

*Date Warned:*

*Jan 14, 2026 -- First Read*

*Date Adopted:*

*April 13<sup>th</sup> 2020*

## **POLICY C14: SECTION 504 AND ADA GRIEVANCE PROTOCOL**

It is the policy of The Orange Southwest School District not to discriminate on the basis of disability. The district has adopted this internal protocol for prompt handling and equitable resolution of complaints alleging any action prohibited by Section 504 of the Rehabilitation Act of 1973, as amended, and the Americans with Disabilities Act of 1990 (ADA).

Section 504 and the ADA prohibit discrimination on the basis of disability in any program or activity receiving Federal financial assistance.<sup>1</sup> The District further provides assurance that strictly prohibits any form of retaliation against persons who utilize this Protocol. To the extent possible, confidentiality will be maintained throughout the investigation of a complaint of unlawful discrimination. **Nevertheless, a person is not required to use this protocol and may instead file a complaint directly with the U.S. Department of Education's Office for Civil Rights, Office for Civil Rights, Boston Office:**

U.S. Department of Education  
8th Floor  
5 Post Office Square  
Boston, MA 02109-3921

The following protocol is available and shall be distributed to all third parties for their use in filing complaints of discrimination based on disability.

**This protocol will be distributed by the building 504 coordinators or their designees to all employees prior to the start of co-curricular activities every school year, preferably during the August In-Service, and again with the recommencement of co-curricular activities immediately following the December vacation.<sup>2</sup>**

**It will also be distributed by Building 504 Coordinators, or their designees, to all third parties, at the time of their engagement for services.**

**<sup>1</sup>Step 1 A person (an employee, student, or third party) who believes that he/she has been discriminated against by the district is encouraged, but is not required, to discuss the matter informally with the appropriate building principal (when the person is a student) or with his/her immediate supervisor (when the person is an employee). NOTE: If the building principal or the immediate supervisor is the subject of the complaint, or the grievant is not a student or employee, the grievant may, instead, contact the District Section 504 Coordinator, Kayla Link ([klink@orangesouthwest.org](mailto:klink@orangesouthwest.org)). The person receiving the complaint, or their designee, shall investigate and then verbally convey his/her findings to both the person who alleged the violation and the person who is the subject of the complaint within 10 business days.**

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<sup>1</sup> 29 U.S.C. § 794; 42 U.S.C. § 12132; 34 C.F.R. § 104.4; 28 C.F.R. § 35.101

<sup>2</sup> 28 C.F.R. § 35.107(b); 34 C.F.R. §§ 100.6(d), 104.7(b), 104.61

**Step 2** If the informal Step 1 process does not resolve the matter, OR if the grievant does not wish to use the informal procedures set forth in Step 1, a written complaint may be submitted to either the District Section 504 Coordinator, Kayla Link ( [klink@orangesouthwest.org](mailto:klink@orangesouthwest.org) ) or the appropriate school specific Building 504 Coordinator who will investigate the complaint. [NOTE: If the Section 504 Coordinator is the subject of the complaint, the complaint should be submitted to the Superintendent who will appoint another administrator (or third party) to conduct the investigation. If both the Section 504 Coordinator and the Superintendent have involvement with the complaint, the written complaint may be submitted to Mindybeth Pike, [mpike@orangesouthwest.org](mailto:mpike@orangesouthwest.org).

The complaint shall be in writing and signed by the grievant and include:

1. the grievant's name and contact information;
2. the facts of the incident or action complained about;
3. the date of the incident or action giving rise to the complaint;
4. the type of discrimination alleged to have occurred; and
5. the specific relief sought;

Or, alternatively, the grievant may use the 504 Complaint Form. Names of witnesses and other evidence as deemed appropriate by the grievant may also be submitted. An investigation of the complaint will begin within 10 business days following the submission of the written complaint.

The investigation may be informal, but it must be thorough and shall include an interview of the parties and witnesses, a review of relevant evidence, and any other steps necessary to ensure a prompt and thorough investigation of the complaint.

**A written disposition of the complaint shall be issued within 10 business days of completion of the investigation, unless a specific written extension of time is provided to the parties.**

Copies of the disposition, subject to FERPA confidentiality,<sup>3</sup> will be given to both the grievant and the person who is the subject of the complaint. If discrimination was found to have occurred, the disposition will include the steps that the District will take to prevent recurrence of any discrimination and to correct its discriminatory effects on the grievant and others, if appropriate.

**Step 3** If the grievant wishes to appeal the decision in Step 2, he/she may submit a signed, written appeal to the Superintendent (or Board if the Superintendent is the subject of the complaint) within 15 business days after receipt of the written disposition. The Superintendent/Board or his/her designee shall respond to the complaint, in writing, within 30 business days of the date of the appeal. Copies of the response shall be provided to

both the grievant and the person who is the subject of the complaint.

The ADA/504 Coordinator(s) will maintain the files and records related to any complaints filed under this protocol.

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<sup>3</sup> 20 U.S.C. § 1232f; 34 C.F.R. § 99.1

The District hereby provides assurance that it strictly prohibits any form of retaliation against persons who utilize this Protocol. The District will make appropriate arrangements to ensure that disabled persons are provided other accommodations, if needed, to participate in this grievance process. Such arrangements may include but are not limited to, providing interpreters for the deaf, providing taped cassettes of material for the blind, or assuring a barrier-free location for the proceedings. The Section 504 Coordinator will be responsible for such arrangements.

If you have questions regarding these procedures or desire to file a complaint, please contact either the District 504 Coordinator or Building Section 504 Coordinator Kayla Link, [klink@orangesouthwest.org](mailto:klink@orangesouthwest.org).

|                            |                                                                                                                                                                                                                           |
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| <i>VSBA Version:</i>       | <i>January 25, 2022</i>                                                                                                                                                                                                   |
| <i>Date Warned:</i>        | <i>Jan. 14, 2026 -- First Read</i>                                                                                                                                                                                        |
| <i>Date Adopted:</i>       | <i>April 13, 2022</i>                                                                                                                                                                                                     |
| <i>Legal Reference(s):</i> | <i>20 U.S.C. § 1232f<br/>28 C.F.R. § 35.101<br/>28 C.F.R. § 35.107(b)<br/>29 U.S.C. § 794<br/>34 C.F.R. § 99.1<br/>34 C.F.R. § 104.4<br/>34 C.F.R. §§ 104.7(b), 104.61<br/>34 C.F.R. § 100.6(d)<br/>42 U.S.C. § 12132</i> |
| <i>Cross Reference:</i>    |                                                                                                                                                                                                                           |

## Worksheet for Board Self-Evaluation of Governance Process Policies

**Policy Number 4.5 Board Members' Code of Conduct**  
**Time period being monitored: FY 25-26**  
**Date Completed: 12/10/25**

**Performance Ratings: always, most of the time, some of the time, never**

| Policy Wording                                                                                                                                                                                                                                                                                                                                                                       | Have we acted consistently with this item of the policy | Specific representative examples to support your response |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|-----------------------------------------------------------|
| The Board commits itself and its members to ethical, businesslike, and lawful conduct, including proper use of authority and appropriate decorum when acting as board members.                                                                                                                                                                                                       |                                                         |                                                           |
| 1. Members must demonstrate loyalty to the ownership, unconflicted by loyalties to staff, other organizations, or any personal interests as Parents or Guardians.                                                                                                                                                                                                                    |                                                         |                                                           |
| 2. It is the ethical and legal duty of all School Board members to avoid conflicts of interest as well as the appearance of conflicts of interest. "Conflict of interest" means a situation when a board member's private interests, as distinguished from the board member's interest as a member of the general public, would benefit from or be harmed by his or her actions as a |                                                         |                                                           |

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| <p>member of the board. In order to comply with the obligations thus imposed, the Board and its members will adhere to the following standards.</p> <p>A. Board members will be familiar with, and adhere to, those provisions of Vermont education law which define School Board powers and govern board member compensation and public bidding processes.</p> <p>B. Board members will not take any action which is intended to give the impression that he or she would represent special interests or partisan politics for personal gain.</p> <p>C. Board members will not use his or her position on the Board in any manner intended to unfairly promote personal financial interests or the financial interests of family members, friends or supporters.</p> <p>D. Board members will not accept anything of value in return for taking particular positions on matters before the Board.</p> <p>E. Board members will do nothing intended to leave the impression that his or her position on any issue can be influenced by anything other than a fair presentation of all sides of the question.</p> |  |  |
| <p><b>Avoiding Conflicts</b> When a board member becomes aware of involvement in a conflict of interest as defined in state law or this policy, he or she will declare the nature and extent of the</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |  |

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|  |  | <p>conflict or appearance of conflict for inclusion in the Board minutes, and will abstain from voting or participating in discussion of the issue giving rise to the conflict.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|  |  | <p><b>Complaints of Conflict of Interest</b> When a conflict of interest claim against a Board member is brought to the Board in writing and is signed by another Board member or a member of the public, and the Board member against whom the claim is made does not concur that a conflict in fact exists, the following Board procedures will be followed.</p> <p>A) Upon a majority vote of the remaining Board members, or upon order of the chair, the Board will hold an informal hearing on the conflict of interest claim, giving both the Board member and the person bringing the claim an opportunity to be heard.</p> <p>B) At the conclusion of the informal hearing, the remaining Board members will determine by majority vote to take one of the following actions:</p> <ol style="list-style-type: none"> <li>1. Issue a public finding that the conflict of interest charge is not supported by the evidence and is therefore dismissed.</li> <li>2. Issue a public finding that the conflict of interest charge is supported by the evidence and that the member should disqualify him or herself from voting or otherwise participating in the Board deliberations or decision related to that issue, as required by Vermont statute.</li> <li>3. Issue a public finding that the conflict of interest charge is supported by the evidence</li> </ol> |

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| <p>and, in addition to disqualifying him or herself from voting or otherwise participating in the Board deliberations or decision, the Board member should be formally censured or subjected to such other action as may be allowed by law.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |  |  |
| <p>3. Board members may not attempt to exercise individual authority over the organization. A Board member will do nothing intended to give the false impression that he or she has the authority to make decisions or take action on behalf of the Board or the school administration. As such;</p> <p>A) Board members' interaction with the Superintendent or with staff must recognize the lack of authority vested in individuals except when explicitly authorized by the Board.</p> <p>B) Board members' interactions with the public, the press, or other entities must recognize the same limitation and the inability of any board member to speak for the Board except to repeat explicitly stated board decisions.</p> <p>C) Except for participation in board deliberation about whether the Superintendent has achieved any reasonable interpretation of board policy, Board members will not express individual judgments of performance of employees, volunteers or the Superintendent.</p> |  |  |

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| 4. Board members will respect the confidentiality appropriate to issues of a sensitive nature.                                                                                       |  |  |
| 5. Board members will be properly prepared for board deliberation.                                                                                                                   |  |  |
| 6. Board members will support the legitimacy and authority of the final determination of the board on any matter, irrespective of the Board member's personal position on the issue. |  |  |

**Which areas were rated as “some of the time,” “rarely,” or “never?”**

**Select ONE area of this policy for improvement over the next year.**

**What actions will we COMMIT to taking in the next year to improve our application of this policy?**

**Who will be accountable for the leadership to ensure it happens?**

**WHEN will we reassess our progress?**

## Worksheet for Board Self-Evaluation of Governance Process Policies

**Policy Number 4.6 Board Committee Principals**  
**Time period being monitored: FY 25-26**  
**Date Completed: 1/14/26**

**Performance Ratings: always, most of the time, some of the time, never**

| <b>Policy Wording</b>                                                                                                                                                                                                                                                                                                                          | <b>Have we acted consistently with this item of the policy</b> | <b>Specific representative examples to support your response</b> |
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| Board committees, when used, will be assigned so as to reinforce the wholeness of the Board's job and so as never to interfere with delegation from board to Superintendent. Accordingly:                                                                                                                                                      |                                                                |                                                                  |
| 1. Board committees are to help the Board do its job, not to help or advise the staff. Committees ordinarily will assist the board by preparing policy alternatives and implications for board deliberation. In keeping with the Board's broader focus, board committees will normally not have direct dealings with current staff operations. |                                                                |                                                                  |
| 2. Board committees may not speak or act for the Board except when formally given such authority for specific and time-limited purposes. Expectations and authority will                                                                                                                                                                       |                                                                |                                                                  |

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| be carefully stated in order not to conflict with authority delegated to the Superintendent.                                                                                                                                                                                                             |  |  |
| 3. Board committees cannot exercise authority over staff, beyond the bounds of typical support functions for committees with assigned staff. Because the Superintendent works for the full board, he or she will not be required to obtain the approval of a board committee before an executive action. |  |  |
| 4. Board committees are to avoid over identification with organizational parts rather than the whole. Therefore, a board committee that has helped the board create policy on some topic will not be used to monitor organizational performance on that same subject.                                    |  |  |
| 5. Committees will be used sparingly and ordinarily in an ad hoc capacity.                                                                                                                                                                                                                               |  |  |
| 6. This policy applies to any group that is formed by board action, whether or not it is called a committee and regardless of whether the group includes board members. It does not apply to committees formed under the authority of the Superintendent.                                                |  |  |

**Which areas were rated as “some of the time,” “rarely,” or “never?”**

**Select ONE area of this policy for improvement over the next year.**

**What actions will we COMMIT to taking in the next year to improve our application of this policy?**

**Who will be accountable for the leadership to ensure it happens?**

**WHEN will we reassess our progress?**

## District Quality Standards

**111.1 Budgeting and Accounting:** The SU/SD follows consistent and financially sound processes to effectively manage its budget, use resources most efficiently, and ensure transparency of financial operations.

| Standard 111.1.3 and 111.1.4                                                                                                                                                                                                                                                                                                                                                          | Beginning                                                                                                                         | Approaching                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Proficient                                                                                                                                                                                                | Advanced                                                                                                                                                                                                                                                                                                                                                                                                                                          |
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| <p>The SU/SD maintains accounting records in accordance with Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board principles (GASB).</p> <p>The SU/SD records and reports information consistent with the most current version of the Vermont Agency of Education Uniform Chart of Accounts (UCOA) within the SU/SD's accounting software.</p> | <p>The SU/SD has adopted accounting oversight procedures. However, neither of the requirements for proficiency have been met.</p> | <p>The SU/SD implements and monitors procedures to ensure that funds are tracked and spent in accordance with state and federal requirements (e.g., detect discrepancies between allocation and spending) and has some internal controls in place. However, SU/SD accounting records are not consistently maintained in accordance with GAAP and GASB principles and/or the most current version of the Vermont UCOA is not consistently used to record and report information.</p> | <p>The SU/SD maintains all accurate accounting records in accordance with GAAP and GASB principles AND consistently uses the most current version of Vermont's UCOA to record and report information.</p> | <p>The SU/SD meets proficiency requirements and uses automated and comprehensive accounting systems which allow for integration between multiple SU/SD systems and provide accurate, real-time financial reporting and analysis. In addition, the SU/SD provides routine, in-depth onboarding/training for new accounting staff in its policies, processes, and procedures to insulate the SU/SD from positional turnover and financial risk.</p> |

| <b>Standard 111.1.5</b>                                                                                                                                   | <b>Beginning</b>                                                                                                                                                        | <b>Approaching</b>                                                                                                                                                  | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
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| The SU/SD employs grants management practices that enable it to effectively and efficiently spend its federal grant funds and prevent reversion of funds. | The SU/SD does not engage in effective practices to track and manage grant funds. Only one or none of the elements of proficient grants management can be demonstrated. | The SU/SD demonstrates some of the elements of proficient grants management or inconsistently engages in these effective practices to track and manage grant funds. | <p>The SU/SD has established and is implementing grants management processes and procedures which, at minimum:</p> <ul style="list-style-type: none"> <li>• identify allowable vs. non-allowable costs ✓ prior to expenditure of funds, for each type of grant;</li> <li>• include regular collaborative reviews between fiscal and grant staff to reconcile actual to budgeted expenditures and identify need for amendments; ✓</li> <li>• ensure adherence to all required AOE timelines for submission of applications, amendments, reimbursement requests, and grant close outs. ✓</li> </ul> | <p>The SU/SD meets proficiency and uses internal controls that align with the guidance in Standards for Internal Control in the Federal Government or the COSO Internal Control-Integrated Framework.</p> <p>In addition, the SU/SD provides routine, in-depth onboarding/ training for new grants management staff in its grant policies, processes, and procedures to insulate the SU/SD from positional turnover, financial risk, and reversion of funds.</p> |

**111.2 Risk Management and Internal Controls:** The SU/SD maintains adequate internal controls to provide reasonable assurance the SU/SD and, as applicable, each member school district within the SU follow State and federal statutes and regulations.

| <b>Standard 111.2.1</b>                                                                                                                                                                                      | <b>Beginning</b>                                                                                                                                                                                                                                                                                                                                                                                                                                         | <b>Approaching</b>                                                                                                                                                                                                                                                                                                                                                                                                                    | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>Advanced</b>                                                                                                                                                                                                                                                                              |
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| The SU/SD completes required audits in accordance with established deadlines and communicates audit results with the SU/SD Board and, as applicable, the board of each member school district within the SU. | <p>The SU/SD has received repeated audit findings of material weakness or significant deficiency, including questioned or disallowed costs, and/or has not taken corrective actions steps to resolve the findings.</p> <p>AND</p> <p>The SU/SD has had one or more single audit delinquencies in past 3 years.</p> <p>AND</p> <p>Audit results may not be shared with the SU/SD Board and, as applicable, the boards of each member school district.</p> | <p>The SU/SD has received audit findings of material weakness or significant deficiency, including questioned or disallowed costs, and is taking corrective action steps to resolve the findings.</p> <p>OR</p> <p>The SU/SD has had one or more single audit delinquencies in past 3 years.</p> <p>OR</p> <p>Audit results may not be shared with the SU/SD Board and, as applicable, the boards of each member school district.</p> | <p>The SU/SD has not received any audit findings of material weakness or significant deficiency, including questioned or disallowed costs, in the most recent year, has not had any single audit delinquencies in the past 3 years, and is taking appropriate steps to rectify management letter concerns, if any. Furthermore, audit results are shared with the SU/SD Board and, as applicable, the boards of each member school district.</p> | <p>In addition to meeting proficient criteria, in the most recent year, the SU/SD received an unqualified opinion on its Annual Financial statements and there were no findings, adverse opinions, or material weaknesses to address, and they were determined to be a low-risk auditee.</p> |

| <b>Standard 111.2.4</b>                                                                         | <b>Beginning</b>                                                                                                                      | <b>Approaching</b>                                                                                                                                                                                | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                 | <b>Advanced</b>                                                                                                                                                                                                                                            |
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| The SU/SD implements and maintains effective procurement and contract administration processes. | The SU/SD has established processes for procuring supplies and services. However, they may not be documented or consistently applied. | The SU/SD has developed and is implementing effective procurement and contract administration processes, ensuring consistent adherence to established policies and timely execution of contracts. | In addition to implementing an effective procurement and contract administration processes, the SU/SD uses a rigorous review process to recruit, screen, select, and evaluate any external partners with whom it will contract (e.g., ensures that providers of professional learning services have expertise in using evidence-based strategies to improve student achievement). | The SU/SD has developed and consistently is implementing a systematic program review and sunset process for all contracted supplies and services, ensuring resources are allocated efficiently and programs are evaluated for effectiveness and relevance. |

**111.3 Personnel Management:** The SU/SD and, as applicable, each member school district within the SU employs staff in accordance with State and federal law and implements equitable and inclusive personnel practices that support effective recruitment and retention of staff.

| <b>Standard 111.3.1, 111.3.2, and 111.3.3</b>                                                                                                                                                                                                                                                                                                                                                                                                     | <b>Beginning</b>                                                                                                                                                                                                                                                  | <b>Approaching</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Proficient</b>                                                                                                                                                                                                                                                                                                        | <b>Advanced</b>                                                                                                                                                                                  |
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| <p>The employer establishes clear and consistent policies and processes for equitable hiring of staff.</p> <p>The employer ensures that all employees, volunteers, and other applicable staff have completed all required background check requirements in accordance with law.</p> <p>The employer ensures that all positions that require professional licensing meet current licensing requirements throughout the duration of employment.</p> | <p>The employer does not have policies, processes and procedures for equitable hiring, management, and evaluation of staff consistent with local, state, and federal law and/or there has been inconsistent implementation of those processes and procedures.</p> | <p>The employer has established clear written policies, processes and procedures for equitable hiring, management, and evaluation of staff consistent with local, state, and federal law, including complying with all hiring requirements concerning background checks, credential verification, and licensure monitoring for all applicable staff and volunteers (e.g., <u>16 V.S.A. § 260</u>). These policies, processes and procedures are consistently applied.</p> | <p>The employer uses a data-informed personnel management process to strategically deploy staff where student needs are greatest, ensuring that staff expertise is aligned with SU/SD/district goals and school improvement efforts and promotes equity in student access to high-quality educational opportunities.</p> | <p>The employer continuously evaluates and improves its personnel systems—including hiring and placement—based on data related to staff qualifications, student needs, and student outcomes.</p> |

**111.4 Data Management:** The SU/SD ensures systems are in place for the efficient and purposeful collection, use, and sharing of data.

| Standard 111.4.4                                                                                                                                                   | Beginning                                                                                           | Approaching                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Advanced                                                                                                                                                                                                                                                                                     |
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| The SU/SD demonstrates purposeful use of data in identifying needs, evaluating program effectiveness, and communicating the current state of educational outcomes. | The SU/SD gathers student and/or system data, but it is not analyzed or used in an intentional way. | The SU/SD has identified key student and system-level indicators (e.g., academic performance, attendance, teacher turnover, etc.) for ongoing measurement that align with local, state, and national requirements and board established targets. The SU/SD uses these indicators to examine patterns and highlight areas of concern; however, analysis, evaluation, and communication remain inconsistent, descriptive, and not yet systematically connected to decision-making or SU/SD priorities. | <p>The SU/SD aligns data analyses with established indicators and board priorities to accurately identify student and system needs and progress.</p> <p>AND</p> <p><i>Need both!</i></p> <p>The SU/SD evaluates program effectiveness to inform decision-making.</p> <p>AND</p> <p>The SU/SD communicates the current state of educational outcomes in a clear, systematic manner, that aligns with SU/SD priorities, and is accessible to the entire school community.</p> | The SU/SD has met the criteria for proficient and, in addition, regularly analyzes data to evaluate the effectiveness of programs and interventions to ensure resources are used equitably and that adjustments to grant applications and continuous improvement plans are made when needed. |

**112 Facilities Management and Safety:** The SU/SD adequately maintains and cleans the facilities for which the SU/SD or, as applicable, a member school district is responsible, and has developed the plans necessary to ensure current and future operations.

| Standard 112.1.1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Beginning                                                                     | Approaching                                                                                                                                           | Proficient                                                                                                                                                                                                                                 | Advanced                                                                                                                                                                                                                                                                                                               |
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| <p>The SU/SD maintains a comprehensive school facilities Operations and Maintenance Manual (OMM) for each building and other facility for which the SU/SD or, as applicable, a member school district is responsible.</p> <p>(a) The SU/SD ensures that educational and program facilities are accessible, clean, safe, secure, well-lit, well-maintained, and conducive to student learning, including having adequate access to technology.</p> <p>(b) The OMM describes regular cleaning routines and maintenance tasks such as the periodic cleaning/changing of HVAC filters and other mechanical systems to ensure good air quality.</p> <p>(c) The SU/SD updates the OMM as changes to facilities or staffing occur and provides training to staff on how to implement the OMM.</p> | <p>The SU/SD does not maintain an OMM for each member school or building.</p> | <p>The SU/SD maintains an OMM for each member school or building but OMMs include varying levels of detail for buildings, grounds, and equipment.</p> | <p>The SU/SD maintains a comprehensive OMM for each member school or building which addresses, at a minimum, each of the required sections from the OMM template (e.g., Facilities Administration, Training, etc.).</p> <p><i>Need</i></p> | <p>The SU/SD OMM includes all the required sections from the OMM template digitally and in hard copy for each member school or building and makes both versions readily accessible in central locations.</p> <p>The SU/SD OMM includes visual aids (e.g., photographs, sketches, or other visual representations).</p> |

| Standard 112.1.2                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Beginning                                                      | Approaching                                                                                                                                                                                                                                          | Proficient                                                                                                                                                                                                                                                                                                                                         | Advanced                                                                                                                                                                                                                                                                                           |
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| <p>The SU/SD maintains a five-year Capital Improvement Plan (CIP) for each building and other facility for which the SU/SD or, if applicable, a member school district is responsible and updates it annually.</p> <p>(a) The CIP describes future capital development and improvement needs, including the need for adequate-sized facilities based on enrollment projections.</p> <p>(b) The CIP also addresses the following categories in addition to capacity: (i) Safety and security infrastructure; (ii) Accessibility; (iii) Technology infrastructure; (iv) Capacity to deliver STEAM (science, technology, engineering, arts, and math) programming; and (v) Building systems' condition and performance, including energy efficiency improvements and indoor air quality to address the health and safety of students and employees.</p> | <p>The SU/SD does not maintain a Capital Improvement Plan.</p> | <p>The SU/SD maintains a Capital Improvement Plan but may not include all schools and/or may lack considerations for enrollment projections, health, safety, security, educational programming goals, and/or building modernization initiatives.</p> | <p>The SU/SD has updated its five-year (minimum) Capital Improvement Plan in the past year. The Capital Improvement Plan incorporates separate considerations for each SU/SD school, as well as considerations for enrollment projections, health, safety, security, educational programming goals, and/or building modernization initiatives.</p> | <p>In addition to meeting proficient requirements, the SU/SD incorporates projects identified through the Educational Facilities Master Planning process in its Capital Improvement Plan and includes plans for school facilities to become resilient areas of refuge during emergency upsets.</p> |

**112.2 Facilities Safety:** The SU/SD ensures that the facilities for which the SU/SD or, as applicable, a member school district is responsible are safe, and maintains up-to-date operational plans to ensure staff and other stakeholders can respond to threats.

| Standard 112.2.1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Beginning                                                     | Approaching                                                                                             | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Advanced                                                                                                                                                                                |
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| <p>The SU/SD maintains a comprehensive Emergency Operations Plan (EOP) in the format prescribed by the Secretary.</p> <p>(a) SU/SD leadership and, if applicable, the leadership of each member school district within the SU reviews and updates the EOP annually to ensure that it includes the essential processes, operations, and assignments that are required to plan, prepare, mitigate, respond to, and recover from an emergency or disaster.</p> <p>(b) The SU/SD ensures that all drills, practice exercises, and other emergency processes required by the EOP are conducted at each building or other facility.</p> | <p>The SU/SD does not have an All Hazards EOP or Annexes.</p> | <p>The SU/SD has a partially developed All Hazards EOP and Annexes, with a timeline for completion.</p> | <p>The SU/SD has developed and implemented a comprehensive All Hazards EOP and Annexes, which is at least as comprehensive as the <u>AOE's template</u>.</p> <p>SU/SD leadership, and the leadership of each member school district, as applicable, have in the past year reviewed and updated the EOP to ensure that it includes the essential processes, operations, and assignments that are required to plan, prepare, mitigate, respond to, and recover from emergencies or disasters. All drills, practice exercises, and other emergency processes required by the EOP are conducted at each building or other facility.</p> | <p>The SU/SD meets proficient requirements and has updated their EOP more frequently than once in the last year with the SU/SD Crisis team and local emergency management partners.</p> |



| <b>Standard 112.2.2</b>                                                                                                                                                             | <b>Beginning</b>                                                                        | <b>Approaching</b>                                                                                                                                                                                                                  | <b>Proficient</b>                                                                                                                                                                                                  | <b>Advanced</b>                                                                                                                                                                                                                                                                                              |
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| The SU/SD ensures that each building and other facility has adopted an appropriate approach to physical security measures to ensure each facility is a safe and secure environment. | The SU/SD does not have a system-wide approach to access control or visitor management. | The SU/SD communicates general expectations to schools on physical security measures but does not provide monitoring or technical support to ensure an approach has been adopted and is appropriate (see <u>16 V.S.A. § 1484</u> ). | The SU/SD ensures that each building and other facility has adopted an appropriate approach to physical security measures to ensure each facility is a safe and secure environment (see <u>16 V.S.A. § 1484</u> ). | <p>The SU/SD ensures consistent implementation of a compliant access control and visitor management policy across all schools through regular audits, walkthroughs, and data reviews.</p> <p>The SU/SD maintains system-wide protocols for monitoring visitor access both during and after school hours.</p> |

## Education Quality Standards

### Development and Implementation of Local Comprehensive Assessment System (LCAS)

| 2123.2 Balanced Assessment                                                                                                                                                                                                                       | Beginning                                                                                                                    | Approaching                                                                                                                                                                       | Proficient                                                                                                                                                                                                                                                                                                                                         | Advanced                                                                                                                                                                                  |
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| (b) employs a balance of assessment types, including but not limited to teacher-or student-designed assessments, portfolios, performances, exhibitions, projects, and surveys or other tools to measure the social-emotional health of students. | The SU/SD has a LCAS that includes assessment types that are not appropriate for the objectives or standards being assessed. | The SU/SD has an LCAS that includes assessments of varied types (e.g., standardized, portfolios, performance tasks), giving students multiple modalities to demonstrate learning. | In addition to the use of varied assessment types for students to demonstrate learning, SU/SD has an LCAS that includes assessments designed to address different purposes (i.e., formative, interim, summative), giving educators multiple pieces of information to inform instructional decision-making about individual and groups of students. | In addition to meeting of the criteria in proficient, the SU/SD provides opportunities for student-and teacher-designed assessments as an integral part of the overall assessment system. |

## Continuous Improvement Plan

| Standard 2125                                                                                                                                                                                                                                                                                                                                                                                                                                       | Beginning                                                                                                                                                                                                                                 | Approaching                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Proficient                                                                                                                                                                                                                                                                                                                                                                                                         | Advanced                                                                                                                 |
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| The Plan shall include indicators provided by the Agency, including those identified in 16 V.S.A. §165(a) and indicators reported pursuant to Section 2124 (Reporting of Results), as well as any additional indicators determined locally. The Plan shall include student-level indicators aggregated for the supervisory union or supervisory district and disaggregated according to school and student subgroups as identified by Section 2124. | The SU/SD does not review each school's Continuous Improvement Plan prior to completion and submission and/or the SU/SD Board and, as applicable, the boards of each member school district, do not review and approve each school's CIP. | <p>The SU/SD ensures that the Continuous Improvement Plans for each school are developed, implemented, and updated at least annually and include, at a minimum:</p> <ul style="list-style-type: none"> <li>documentation of the stakeholders (names and roles) involved in CIP planning including school board members, students, teachers, administrators, families and other community members;</li> <li>prioritized goals for each school that address academic achievement, safe and healthy school environments (per 2125 (c) and prioritized strategies that are directly related to meeting those goal(s) with evidence-level and research source citations for each strategy; and</li> <li>human, material, and fiscal resources required to support effective implementation of those strategies.</li> </ul> <p>AND</p> <p>The SU/SD Board and, as applicable, the boards of each member school district, have approved each school's CIP.</p> | In addition to meeting of the criteria in approaching, the SU/SD ensures that Continuous Improvement Plan goals and strategies for each school, are based on a comprehensive needs assessment that includes analysis of student-level indicators disaggregated according to school and student subgroups as required in EQS Section 2124 and compared to such indicators aggregated at the SU/SD and state levels. | The SU/SD builds and coordinates its LEA strategic planning based on member school districts needs assessment and goals. |



| <b>2125 Engagement</b>                                                                                                                                                                         | <b>Beginning</b>                                                                                                                                                                                   | <b>Approaching</b>                                                                                   | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | <b>Advanced</b>                                                                                                                                                                                                             |
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| The Plan shall be developed by involving a culturally and socially diverse group comprised of school board members, students, teachers, administrators, families, and other community members. | The SU/SD communicates to school leaders that broad stakeholder engagement is required in the CIP planning process but does not provide clear guidance or expectations for stakeholder engagement. | The SU/SD provides guidance to school leaders on stakeholder engagement strategies and expectations. | The SU/SD ensures that each school's leaders engage a culturally and socially diverse group of school board members, students, teachers, administrators, parents, families, and other community members in their CIP development process. The SU/SD provides guidance and training to school leaders on strategies to engage different groups of stakeholders, including specific strategies to engage those from historically marginalized groups and/or with linguistic differences. | The SU/SD ensures that the Continuous Improvement Plans for each school meet all proficient criteria, and are made publicly available in an accessible format to students, teachers, families, and other community members. |

| 2125 SU/SD Support                                                                                                                       | Beginning                                                                                                                                                       | Approaching                                                                                                                                                                                                                                                                                                             | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                           | Advanced                                                                                                                                                                                                                                                                                                                                                                                                                                 |
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| <p>The Plan shall be reviewed at least annually for effectiveness toward meeting the stated goals and shall be revised as necessary.</p> | <p>The SU/SD does not provide initial or on-going support to each school's leaders in the development, implementation, and/or evaluation of their CIP plan.</p> | <p>The SU/SD provides support to each school's leaders in the development of their CIP plan. However, the SU/SD does not have a plan for monitoring implementation of school-level strategies, nor for supporting school leaders in evaluating the effectiveness of their strategies in meeting their stated goals.</p> | <p>In addition to providing support to each school's leaders in development of their CIP plan, the SU/SD conducts on-going activities to support school leaders in monitoring implementation of school-level strategies and in evaluating the effectiveness of their strategies in meeting their stated goals. The SU/SD supports school leaders in revising their plans as needed throughout the school year in response to ongoing evaluation.</p> | <p>The SU/SD implements structured, research-based progress monitoring protocols to ensure that, for each school, local change strategies are implemented as intended (e.g., fidelity checks), and provides support to school leaders in measuring interim outcomes throughout the annual cycle, and revising their improvement strategies mid-cycle based on ongoing evaluation of their effectiveness toward meeting stated goals.</p> |

## District Quality Standards

**113.1 Governance Priorities:** Through an equity lens, the Board of each SU/SD and, as applicable, of each member school district within the SU, adopts a vision and measurable goals to support continuous improvement and monitors student academic progress and wellness.

| Standard 113.1.1                                                                                                                  | Beginning                                                                                                                                                                                                                                                                                                                                                          | Approaching                                                                                                                                                                                                                                                                                                                                                                                           | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Advanced                                                                                                                                                                                                                                                                                                                                                                                        |
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| The Board follows an inclusive process to invite and incorporate community input into the vision and goals for the school system. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has not created a vision nor set any goals.</li> <li>• The Board has an established vision and goals, but does not have a process for obtaining community input into creating a vision and/or goals.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has created a vision and has set goals, and the Board has established a singular method for obtaining community input regarding the vision and goals.</li> <li>• The Board has not ensured the vision and goals are publicly available.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The community engagement to gather input into the vision and goals.</li> <li>• The Board identifies barriers—both real and perceived—that may prevent different community groups from participating in the Board's engagement efforts and provides opportunities for those groups to give input.</li> <li>• The Board has ensured the vision and goals are publicly available.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• Board uses multiple methods and provides multiple opportunities for diverse groups to provide input into the vision and goals.</li> <li>• The Board annually evaluates and adjusts its community engagement plan as needed to gather input.</li> </ul> |

| Standard<br>113.1.2                                                                                       | Beginning                                                                                                                                                                      | Approaching                                                                                                                                                                                                                                                                                                                                                                                            | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Advanced                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
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| At least annually, the Board sets measurable goals and regularly reviews the progress toward those goals. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <p>The Board does not set measurable goals for itself or for the district.</p> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• In conjunction with its vision and with input from the Superintendent, the Board sets measurable goals annually.</li> <li>• The Board reviews progress toward the goals, but does not establish specific targets or metrics to support its review.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board sets annual goals that reflect areas such as academic progress, wellness, and equity, and consider the experience of all students, including historically marginalized groups.</li> <li>• At least annually, the Board uses an established system to review progress toward the goals.</li> <li>• The Board develops a publicly available annual work plan that outlines all of the above.</li> <li>• Annually, the Board reviews its “equity lens” and how it applies to board work.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• Annually, before setting new goals, the Board reviews its goal setting process and adjusts it as needed to ensure goal relevancy.</li> <li>• The Board ensures that its “equity lens” is informed by community engagement.</li> <li>• All board members can readily identify goals, explain why they are important, and whether progress is being made.</li> </ul> |

| <b>Standard 113.1.3</b>                                                       | <b>Beginning</b>                                                                                                                                                                                                       | <b>Approaching</b>                                                                                                                                                                                                                                                                                                                                                                                                   | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                             |
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| At least annually, the Board monitors student academic progress and wellness. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board does not monitor student academic progress and wellness.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• A majority of board members understand the key indicators of student academic progress and wellness.</li> <li>• The Board includes monitoring student academic progress and wellness in its annual work plan but does not establish specific measurable targets.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board establishes specific, measurable targets which are identified and used to track student academic progress and wellness.</li> <li>• At least annually, the Board uses multiple sources of data to monitor student academic progress and wellness.</li> <li>• The Board relies on multi-year data to observe changes over time.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board uses key indicators, state and national comparison data, and data trends to inform their annual work plan.</li> <li>• Board minutes reflect review of progress towards student outcome goals.</li> </ul> |

**Traditional Board Governance** (*SELECT Traditional Board Governance or Policy Governance*)

| <b>Standard<br/>113.1.4</b>                                                                                                                                             | <b>Beginning</b>                                                                                                                                                                                                           | <b>Approaching</b>                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| At least annually, the Board formally evaluates the performance of the superintendent, based in part on the superintendent's progress toward meeting agreed-upon goals. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>The SU/SD Board does not evaluate the performance of the superintendent.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>Annually, the SU/SD Board provides the Superintendent with a written performance evaluation based on nationally-recognized educational leadership standards for educational leaders.</li> <li>The SU/SD Board and Superintendent have established mutually agreed upon goals in alignment with district goals.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>Annually, the SU/SD Board provides the Superintendent with a written performance evaluation based on progress toward meeting agreed-upon goals.</li> <li>The SU/SD Board includes a provision for the annual performance evaluation in the superintendent's contract.</li> <li>SU/SD Board collects feedback from all member boards for consideration in annual performance evaluation.</li> <li>The SU/SD Board uses a documented and replicable process and timeline for superintendent evaluation and communicates these expectations to all member boards.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>All SU/SD and member district board members participate in the superintendent evaluation process.</li> <li>The SU/SD Board solicits feedback from direct report administrative team members, which leads to the development of future goals for the Superintendent.</li> <li>The SU/SD Board conducts an informal mid-year review of the superintendent's progress toward agreed-upon goals.</li> <li>The SU/SD Board completes a self-assessment of the superintendent evaluation process, which may include input from the Superintendent.</li> </ul> |

**Policy Governance® Boards:** Vermont school districts that have officially adopted and are actively using Policy Governance®. (Policy Governance® is a trademarked governance system created by John and Miriam Carver in the 1970s.)

| Standard 113.1.4                                                                                                                                                        | Beginning                                                                                                                                                                                                                                     | Approaching                                                                                                                                                                                                                                                                                                                                          | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Advanced                                                                                                                                                                                                                                                                                                    |
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| At least annually, the Board formally evaluates the performance of the superintendent, based in part on the superintendent's progress toward meeting agreed-upon goals. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The SU/SD Board does not formally evaluate the performance of the CEO on an annual basis.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The SU/SD Board evaluates the CEO annually on some, but not all Ends and Executive Limitations policies through monitoring the CEO's reports and uses an annual monitoring report tracking form.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board includes a provision for annual performance evaluation in the CEO's contract.</li> <li>• The Board provides the CEO with feedback as it reviews the CEO's monitoring reports.</li> <li>• The SU/SD Board evaluates the CEO annually on <u>all</u> Ends and Executive Limitations policies through the CEO's monitoring reports and uses an annual monitoring report tracking form.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board creates a written evaluation summary and a report on the CEO's goals (if applicable) to accompany the annual monitoring report tracking form.</li> </ul> |

**113.2 Governance Protocols:** The Board of each SU/SD and, if applicable, of each member school district within the SU adopts, reviews annually, and revises, as needed, operating protocols for how it does its work and annually reads foundational documents such as articles of agreement.

| <b>Standard 113.2.1</b>                                                                                        | <b>Beginning</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>Approaching</b>                                                                                                                                                                                                                                                                                                                                                     | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>Advanced</b>                                                                                                                                                                                                                                                                              |
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| The Board annually assesses its performance, including adherence to agreed protocols, processes, and policies. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has not adopted a Conflict-of-Interest policy.</li> <li>• The Board has not adopted a Code of Ethics or a Code of Conduct that outlines expectations of and commitments made by board members</li> <li>• The Board has not agreed on a set of board operating protocols or norms.</li> <li>• The Board does not have an annual work plan.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has adopted a Conflict-of-Interest policy.</li> <li>• The Board has adopted a Code of Ethics and/or a Code of Conduct.</li> <li>• The Board has agreed upon a set of board operating protocols or norms.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• Annually, the Board self-assesses its performance based on its adherence to its operating protocols, processes and policies, and its board goals as identified in its annual work plan.</li> <li>• The Board has established operating protocols or norms in its annual work plan that clearly defines roles and responsibilities for board members.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The annual work plan includes an established time frame by which policies, procedures, and operating protocols are reviewed and updated.</li> </ul> |

| Standard 113.2.2                                                                                                                        | Beginning                                                                                                                                                                                                                                                                                                                                                                                                    | Approaching                                                                                                                                                                                                                                               | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Advanced                                                                                                                                                                                                                                                                                                                      |
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| The Board annually reviews whether and/or how its actions and contributions have impacted the school system's success in meeting goals. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board does not annually review whether and/or how its actions and contributions impact the school system's success in meeting goals.</li> <li>• The Board's actions and contributions do not relate to the school system's success in meeting goals.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has identified specific actions required to make progress toward the school system's goals.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• Annually, the Board establishes an annual work plan which defines Board actions and contributions to school system success.</li> <li>• Annually, the Board evaluates its success in completing defined actions as stated in the annual work plan.</li> <li>• Annually, the Board reviews its work plan, refines goals, and identifies actions it needs to take to achieve the goals.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board can demonstrate a positive correlation between successful completion of work as defined by its annual work plan and progress toward established district goals.</li> </ul> |

| Standard 113.2.3                                                                                         | Beginning                                                                                                                                                                                                          | Approaching                                                                                                                                                                                                                                                 | Proficient                                                                                                                                                                                                                                                                                                    | Advanced                                                                                                                                                                                                                                                                                                                                                                                                                                       |
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| The Board annually evaluates the effectiveness of community engagement and public communication efforts. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <p>The Board does not evaluate the effectiveness of its community engagement and public communication efforts.</p> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board collects information on its community engagement rates, such as total number of participants.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board includes an annual self-evaluation of the effectiveness of its community engagement and public communication efforts in the annual work plan.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has identified specific data about community and public engagement efforts to be collected on an annual basis.</li> <li>• Annually, the Board reviews the data collected and uses it to set targeted goals to improve its community engagement and public communication efforts.</li> </ul> |

| <b>Standard 113.2.4</b>                                                                                                                                                                            | <b>Beginning</b>                                                                                                                                                                                                                                                                                                                                                                                                 | <b>Approaching</b>                                                                                                                                                                                                                                                                                           | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                                                       | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
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| The Board undertakes its own continuous learning and development and provides members with opportunities for ongoing training and support to maintain and increase their skills and understanding. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board does not set aside meeting time for continuous learning and board development.</li> <li>• The Board does not offer any training to new board members.</li> <li>• The Board Chair and Superintendent do not complete their required joint training.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board provides an orientation for new board members.</li> <li>• Some board members complete at least one professional development training annually.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board's annual work plan ensures that all board members maintain and increase their knowledge and skills.</li> <li>• The Board tracks member participation in training.</li> <li>• The Board Chair and Superintendent complete their required joint training.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board holds an annual retreat that includes continuous learning and development.</li> <li>• The Board includes at least one annual training that provides board members with information on in Diversity, Equity, Inclusion or recognizing Implicit Bias.</li> <li>• The Board uses its self-evaluation to plan for future learning and development based on needs it identifies.</li> <li>• At least one board member is engaged with local, state and/or national organizations that provide access to new ideas and best practices.</li> </ul> |

**113.3 Governance Processes:** The Board of each SU/SD and, if applicable, of each member school district within the SU establishes and follows inclusive, transparent, and predictable methods to conduct its work.

| Standard<br>113.3.1                                                                                                                             | Beginning                                                                                                                                                                                                                                                            | Approaching                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Advanced                                                                                                                                                                                                                                                                                                      |
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| The Board discusses, adopts, and revises policies on a regular basis to ensure the system is supporting and meeting the needs of every student. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has not adopted policies.</li> <li>• Board policies do not support or meet the needs of every student.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has adopted all of the policies required by law and regulation.</li> <li>• The Board has adopted policies that align with the district's vision and support student opportunities and outcomes.</li> <li>• The policies are clear and, where appropriate, delineate the roles and responsibilities of the Board and administration.</li> <li>• The Board has reviewed at least half of its policies within the last 5 years.</li> <li>• The Board maintains a policy manual that is accessible by the community.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has established a system for an annual policy review and incorporates it into the annual work plan.</li> <li>• The Board has reviewed and updated as needed all of its policies within the last 5 years and ensures that adopted policies are relevant to board responsibilities.</li> <li>• The Board has established an equity lens that identifies the historically marginalized populations of the school district and aligns policies to address inequities.</li> <li>• <i>For supervisory unions only:</i> The supervisory union board has, to the extent possible, adopted a single policy manual for use by member districts. School district boards have documented the instances when unique district policies are advisable, with a rationale for the differences.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has established an equity lens tool to review policy effectiveness and impact on all students, including historically marginalized populations.</li> </ul> |

| Standard 113.3.2                                                                                                                                                             | Beginning                                                                                                                                                                                                                                                                                                                 | Approaching                                                                                                                                                                                                                                                                                                     | Proficient                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Advanced                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Board ensures its annual budget aligns with its stated priorities and provides an equitable distribution of resources to help meet the needs and goals of every student. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board does not have policies related to budgeting and financial oversight.</li> <li>• The Board does not consider how the budget aligns with district priorities.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has adopted policies related to budgeting and financial oversight.</li> <li>• The Board considers how the budget aligns with district priorities.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has established a budget that provides an equitable distribution of resources to help meet the needs and goals of every student</li> <li>• The budget addresses specific budget drivers such as per-student costs, student: staff ratios, projected tax rates, SU/SD goals, capital plan, facility needs, etc.</li> <li>• Board members are able to articulate the connection between the budget and the stated priorities.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board monitors student outcomes to ensure that the investments made meet the needs of every student and advance those outcomes.</li> <li>• When possible, the annual budget proposal includes investment in research-based practices that address identified equity gaps and correspond to identified district priorities.</li> </ul> |

| <b>Standard 113.3.3</b>                                                                                 | <b>Beginning</b>                                                                                                                                                                                                                                                                                                                                | <b>Approaching</b>                                                                                                                                                                                                               | <b>Proficient</b>                                                                                                                                                                                                                                                           | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                                |
|---------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Board ensures its members are aware of conditions set forth in negotiated agreements and contracts. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• The Board is not aware of conditions set forth in negotiated agreements and contracts, such as the teacher contract, the superintendent's contract, and the employee health care agreement.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• All Board members have access to review negotiated agreements and contracts.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• All Board members review the conditions set forth in negotiated agreements and contracts on at least an annual basis.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board ensures that negotiated agreements and contracts support the goals of the district.</li> <li>• The Board can articulate a clear connection between contracts and their impact on district goals.</li> </ul> |

| <b>Standard 113.3.4</b>                                                                                                                | <b>Beginning</b>                                                                                                                                                                                                                                                                                      | <b>Approaching</b>                                                                                                                                                                                                                                                                                                              | <b>Proficient</b>                                                                                                                                                                                                                                                                                                                                                                          | <b>Advanced</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Board ensures its members understand and comply with Vermont statutes and regulations relevant to board work and public education. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• A majority of board members are not familiar with relevant and Vermont statutes and regulations that impact school board operations and business.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• A majority of board members are familiar with relevant Vermont statutes and regulations.</li> </ul>  | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• All board members receive annual training in Vermont education law and education funding system.</li> <li>• All board members receive annual training in Vermont's Open Meeting Law, Robert's Rule of Order, and Public Records Law.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• Upon appointment, all new board members receive training and instruction in Vermont education law, Vermont education funding system(s) and the role of school boards in funding, Vermont's Open Meeting Law, Robert's Rules of Order, and Public Records Law.</li> <li>• The Board's annual work plan dedicates time during at least one meeting to review current year changes to education law, regulations, and policy.</li> </ul> |

| Standard 113.3.5                                                                                                   | Beginning                                                                                                                                                                                                                                                                             | Approaching                                                                                                                                                                                                                                          | Proficient                                                                                                                                                                                                                                                                                                                                                                                    | Advanced                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Board stays apprised of proposed legislation and policy-making that may affect its school system and students. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• A majority of board members are unaware of proposed legislation or regulations that may affect Vermont's public education system.</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board collectively reviews new laws and regulations after the legislative session concludes.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board reviews proposed or upcoming legislative changes at least once during the Vermont legislative session.</li> <li>• At least one board member is responsible for tracking applicable legislation and keeping the Board updated.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board establishes a system to keep community members apprised of proposed and developing legislation by including legislative updates at regular meetings during the legislative session.</li> </ul> |

| <b>Standard 113.3.6</b>                                                     | <b>Beginning</b>                                                                                                                                                                                                                                                                               | <b>Approaching</b>                                                                                                                                                                                                                             | <b>Proficient</b>                                                                                                                                                                                                                                                                                   | <b>Advanced</b>                                                                                                                                                                                                                                                                                       |
|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The Board maintains an ongoing relationship with locally elected officials. | <p><b><i>The Board is at beginning proficient if the following conditions are true:</i></b></p> <ul style="list-style-type: none"> <li>• Few if any board members have a relationship with locally elected officials (e.g. state legislators and selectboard/city council members).</li> </ul> | <p><b><i>The Board is approaching proficient when the following conditions are met:</i></b></p> <ul style="list-style-type: none"> <li>• At least one member of the Board occasionally communicates with locally elected officials.</li> </ul> | <p><b><i>The Board is proficient when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board has an established process for regular communication with its locally elected officials, especially during the legislative session.</li> </ul> | <p><b><i>The Board is advanced when all prior conditions and the following are met:</i></b></p> <ul style="list-style-type: none"> <li>• The Board invites its locally elected officials to present information to the Board during regular meetings and/or the district's annual meeting.</li> </ul> |

**Orange Southwest School District (OSSD)**  
**Regular Board Meeting on Wednesday December 10, 2025**  
**Braintree Elementary School**  
**6pm**

Google Meeting Joining Info  
Video call link: [https:// meet.google.com/zac-vfvp-agq](https://meet.google.com/zac-vfvp-agq)  
Or Dial: (US)[+1 502-518-3415](tel:+15025183415)  
PIN: 480 799 316#

**I. Opening (6:00 pm)** Meeting called to order at 6:02 p.m. by Board Chair Anne Kaplan

- **Board Attendance:** *Ensuring a quorum* – Rachel Gaidys, Beverly Lauchner, Ryan Anderson, Anne Kaplan, Martha Hafner in person with Sam Hooper, Aimil Parmelee and Rachel Fish remotely. Administration: Michael Clark and ORCA media in person, Robin Pembroke and Kyle Southworth remotely.  
All attending public was remote: Joe Bent, Amy Ferris, Molly Mullen, Abi McFadyen, Tracy Gardner, Todd Lewis, Lisa Floyd, Dan Morrison, Beth Osha, Kathryn Fredericks, Lauren Futtner, Herb Perez
- **Meeting Purpose:** Initiation of Budget Process
- **Review and Accept Agenda:** *Meeting purpose? Are these the right agenda items? Is the right amount of time allotted?*

**II. Ownership Linkage (6:05)**

- **Public Comment:** Please hold comments on the budget until the second public comment. *The Board welcomes comment but is not able to take any action. Comments limited to 3 minutes per speaker.*  
No comments
- **Review Updated Budget Numbers and Preliminary Data**  
Michael Clark spoke, discussing the level service draft budget presented to the board last month. The board requested the leadership team come back with another plan to keep the budget under the excess cost threshold – this new plan includes retiring the associate principal position at the high school, the assistant director of special education position, and removing the unfilled (but budgeted) interventionist position as well as replacing teacher PC laptops and MacBooks with high-end Chromebooks. These current cuts will not reduce faculty or support staff, and will not impact students but Michael Clark warns that the next level of reductions (if required) would. The board questions if the administration reductions will cause the district to lose federal funds, and what mechanisms are in place to re-distribute the work load? Michael Clark responds that federal funding for the retired positions would be repurposed elsewhere, and replacing the assistant director of special education with an inclusion specialist position would allow the district to maintain students within the OSSD so they wouldn't have to be tuitioned out. The board asks if there is any federal funding expected for the increased special education expenses? Michael Clark responds that expense above \$67,000 per student is reimbursed through federal funds at 90%. This is considered in the budget – with tuition as an expense and the reimbursement as revenue.

Lisa Floyd responds to the re-distribution of responsibilities by explaining the plan to take the position apart and have other staff take on portions of the work that are aligned with what they already do.

More questions about timelines for getting the remainder of the data from the state (weighted average should be available mid-December, yield is set by the legislature, probably coming in January). Conversation of what the yield is and how it affects tax rates. The data relies heavily on the Dec. 1, 2025 tax letter which projects the Equalized Homestead Tax Rate to be \$1.8362, up .61 of a penny from last year's \$1.8301. The Tax Department has projected CLA rates for the three towns with Braintree remaining level, Randolph increasing by 8 cents (per \$100) and Brookfield 12 cents (per \$100). Michael Clark stresses that tax rate projections are very preliminary and the only thing he can guarantee is that the numbers will not be the same as the actual end result.

- **Public Comment:** specific to the *updated budget information*. *The Board welcomes comment but is not able to take any action. Comments limited to 3 minutes per speaker.*

No comments.

- **Board Discussion:** Does the Board believe this is supportable by the taxpayers?

Hearing no public input, board members are prepared to support the budget as presented.

- **Next steps and Budget Timeline reviewed**

With all of the data available from the state in time for January's meeting, the board is anticipating the warning and ballot with the finalized figures.

- **Up for Learning Update**

The last meeting of the series was held Tuesday, Dec 9 at the VTSU campus center in Randolph Center. Secretary Saunders, Aaron Davis and the Assistant Director of the VPA attended student presentations. Michael Clark suggests the board consider inviting the RUMHS Up For Learning students to attend the January board meeting and share their vision. Districts involved in this are OSSD, WRV and Montpelier. The students are looking forward to presenting to the House Education Committee. Michael Clark clarifies this is the students' vision of what education in Vermont could look like, not a problem solving exercise or roadmap to how the state can solve any current education issues. The board requests the Up For Learning presentation be added to January's agenda.

### **III. Board Process (7:30)**

- **Support Staff Negotiations (Pick a date for committee)**

The Staff Negotiation Committee is comprised of Anne Kaplan, Rachel Gaidys, Ryan Anderson and Martha Hafner. Typically the meetings with the Association are 5-7 pm. The board discusses what days might work best, Thursdays appear to be the best fit for all (with the exception of the second Thursday of each month). Michael Clark will send out the ground rules and reach out to the Association to arrange the initial meeting.

- **Sabbatical Request: Accept/Reject Sabbatical Request**

Brief discussion of the process of Sabbatical Requests in general. Rachel Fish would like to continue researching how these requests are handled in other districts (multiple requests, etc.) The board encourages further research.

**VOTE: Martha Hafner moves to accept the sabbatical request of Amy Churchill Ferris for the 26-27 school year. Beverly Lauchner seconds and the motion passes unanimously.**

- **Review Draft of Annual Report from the Board**

Anne Kaplan presents the letter to the board, short discussion outlining what the board thinks is important. Anne Kaplan will update with suggestions and forward to Ben Merrill for inclusion in the Annual Report.

- **Discussion around meeting with Legislators**

The board typically meets with Legislators at the February regular board meeting. Discussion that the meeting runs longer because of the dense content, does the board want to schedule a special meeting in March or April for just the Legislative discussion or continue to have it in the regular meeting? Members of the board agree that February works best given that March is potentially given over to the on-boarding of new members. Sam Hooper offers to reach out to lawmakers to invite them to the regular February 11, 2026 meeting at the RUMHS Media Center. They have traditionally filled this role.

VOTE: Rachel Gaidys moves that the board meet with Legislators in February and requests that Sam Hooper coordinate communication and invitations. Ryan Anderson seconds the motion which passes unanimously.

#### **IV. Board Education (7:45)**

- Reminder of Policy Governance Virtual Training January 22,2026

#### **V. Monitoring the Organization (7:50).**

- Review EL 2.4 & 2.5 (BMD 3.4.5) 1st Read

Michael Clarks reports more work needs to be done on 2.5 Emergency Superintendent Succession. Last year there was an assistant superintendent that could assure the district would operate efficiently if superintendent services were suddenly lost, but that position has been resigned. Michael Clark reports that while a good mechanism for this eventuality is not yet in place, one is in the works. He will offer an interim report on EL 2.5 at the January regular meeting and finalize it in February.

- Financials (EL 2.3 Financial Conditions)

#### **VI. Policy Decisions for District Governance (8:00)**

- None for this month

#### **VII. Monitoring the Board (8:10)**

- Board Self-Evaluation: Monitoring compliance with Board Governance Process and Board Management Delegation Policies.

Board discusses.

- GP 4.5 Governance Investment – Self Evaluation

Board discovers and discusses that the policy was incorrectly named on the agenda. Agreement that the conversation should be tabled until next month when the discussion is properly titled.

VOTE: Anne Kaplan moves to table discussion of 4.5 until the January regular meeting and review both 4.5 and 4.6 at that time. Beverly Lauchner seconds, the motion passes unanimously.

#### **VIII. Consent Agenda (8:20)**

- Vote on acceptance of Consent Agenda: *Items that the Board has previously delegated to the Superintendent, but that an external authority requires the Board to approve. The entire Consent Agenda is adopted by one motion, without discussion. However, an item can be removed from the Consent Agenda for discussion with a majority vote GP 4.3.4.*
- Approve Minutes from November 12, 2025
- New Hires

*VOTE: Aimil Parmelee moves to accept consent agenda as presented, seconded by Rachel Fish. The motion passes unanimously.*

## **IX. Closing/Incidental Information (8:25)**

- Superintendent's Report
  - Up for Learning Project
  - Ends Snapshot

Michael Clark draws attention to the December ENDS snapshot that immediately follows the Superintendent's Report in the board packet this month.

- Action Item Recap

The board reviews assignments

## **X. Executive Session**

*VOTE: Aimil Parmelee moves to find that premature general knowledge regarding the superintendent's contract clearly places the board at a substantial disadvantage because the board risks disclosing its negotiation strategy if it discusses the superintendent's contract in public. Motion is seconded by Ryan Anderson, and passes unanimously.*

*VOTE: Aimil Parmelee moves to enter Executive Session for the purpose of discussing the superintendent's contract under Title 1, Section 131 (a)(1). Sam Hooper seconds, the motion passes unanimously.*

*The board goes into executive session at 7:55 p.m. with Michael Clark attending for the first few minutes to offer information, then exiting.*

## **Future Meetings**

- Agenda Planning Meeting: Monday January 5 at 6 pm
- Regular Board Meeting: 6pm January 14, 2026 at Randolph Elementary

Respectfully submitted:

*Kyle M. Southworth*

Administrative Assistant, 12/12/25

**Orange Southwest School District (OSSD)**  
**Special Board Meeting, Monday January 5, 2026**  
**OSSD Central Office, 5pm**

Meeting ID [meet.google.com/dyb-xrvt-kru](https://meet.google.com/dyb-xrvt-kru)

Phone Numbers (US)+1 252-662-0212

PIN: 313 417 334#

**I. Opening (5:00 pm)** Meeting called to order by board chair Anne Kaplan at 5:11

- Board Attendance: *Ensuring a quorum*  
Attending in person: Anne Kaplan, Michael Clark. Remotely: Aimil Parmelee, Sam Hooper, Rachel Fish, Bev Lauchner. Public: none attending.
- Meeting Purpose: Consult with Legal Counsel re: Superintendent Contract
- Review and Accept Agenda: *Meeting purpose? Are these the right agenda items? Is the right amount of time allotted?*

**II. Ownership Linkage (5:05)**

- Public Comment: *The Board welcomes comment but is not able to take any action. Comments limited to 3 minutes per speaker.*  
No public attending

**III. Executive Session** *First Motion: I move to find that premature general knowledge regarding the superintendent's contract clearly places the board at a substantial disadvantage because the board risks disclosing its negotiation strategy if it discusses the superintendent's contract in public.*

**VOTE:** *So moved by Beverly Lauchner, seconded by Aimil Parmelee. Motion passed unanimously.*

*Second Motion: I move to enter Executive Session for the purpose of discussing the superintendent's contract under Title 1, Section 131 (a)(1).*

**VOTE:** *So moved by Beverly Lauchner, seconded by Rachel Fish. Motion passed unanimously.*

*With no further business, board chair Anne Kaplan adjourned the meeting at 5:57 p.m.*

**Future Meetings**

- Agenda Planning Meeting: Tuesday January 6, 2026 at 6 pm
- Regular Board Meeting: 6pm January 14, 2026 at Randolph Elementary

Respectfully submitted,

Kyle Southworth

Kyle M Southworth

Administrative Assistant, 1/8/2026

**Executive Session Minutes**  
**Orange Southwest School District Special Meeting, Jan 5, 2026**  
Continuation of minutes provided by Kyle Southworth

**Executive Session**

At 5:14 p.m. a motion was made by Beverly Lauchner and seconded by Aimil Parmelee to enter Executive Session to consult with legal counsel regarding the Superintendent's contract without the Superintendent present. The vote passed unanimously.

The Board exited Executive Session at 5:56 pm with no action taken.

Respectfully submitted,

Kyle Southworth

Kyle M Southworth

Administrative Assistant, 1/8/2026

**ORANGE SOUTHWEST SCHOOL DISTRICT**

***2026-27 ANNOUNCED TUITION:***

|             |          |
|-------------|----------|
| Elementary  | \$22,187 |
| High School | \$27,663 |
| RAVEN       | \$31,585 |
| RTCC        | \$24,695 |

**RANDOLPH TECHNICAL CAREER CENTER**  
**FY 2026-27 Estimated Technical Tuition Worksheet**  
**DRAFT 2**

**1/6/2026**

Total Budgeted Expenditures \$3,451,569  
(Less Adult Ed )

LESS: Relevant Budgeted Revenues \$706,187

Local Technical Education Spending: \$2,745,382

Estimated Full-Time Equivalent (SENDING DISTRICTS) 111.17  
*FY 2026-27 FTE ESTIMATED*

LESS: General State Support Grant \$1,279,233  
*(111.17 x \$13,227) 87%*

Amount to be Raised from Vermont Tuition \$1,466,149

Net Tuition to be raised \$1,466,149

**2026-27 Estimated Tuition per Full-time Equivalent Vt. Student** **\$13,188**  
**(\$2,011,718/111.17)**

*ANNOUNCED TUITION - 2025-26* **\$12,469**

**INCREASE/(DECREASE)** **\$719**

| <b>TOTAL ANNOUNCED TUITION:</b> |         | <u>STATE</u> | <u>LOCAL</u> | <u>TOTAL</u> |       |
|---------------------------------|---------|--------------|--------------|--------------|-------|
|                                 | 2012-13 | \$7,589      | \$6,012      | \$13,601     |       |
|                                 | 2013-14 | \$7,961      | \$6,631      | \$14,592     |       |
|                                 | 2014-15 | \$8,078      | \$7,069      | \$15,147     |       |
|                                 | 2015-16 | \$8,229      | \$7,212      | \$15,441     |       |
|                                 | 2016-17 | \$8,440      | \$6,791      | \$15,231     |       |
|                                 | 2017-18 | \$8,342      | \$6,306      | \$14,648     |       |
|                                 | 2018-19 | \$8,567      | \$7,922      | \$16,489     |       |
|                                 | 2019-20 | \$8,813      | \$9,112      | \$17,925     |       |
|                                 | 2020-21 | \$9,189      | \$8,589      | \$17,778     |       |
|                                 | 2021-22 | \$9,197      | \$8,482      | \$17,679     |       |
|                                 | 2022-23 | \$9,785      | \$8,885      | \$18,670     |       |
|                                 | 2023-24 | \$10,876     | \$12,000     | \$22,876     |       |
|                                 | 2024-25 | \$11,365     | \$12,145     | \$23,510     |       |
|                                 | 2025-26 | \$11,021     | \$12,469     | \$23,490     |       |
| <b>Draft</b>                    | 2026-27 | \$11,507     | \$13,188     | \$24,695     | 5.13% |

Agreement to Join the Winooski Valley & Statewide  
Choice of Public High School Collaborative  
for the 2026-2027 School Year  
Under Act 129 (Sec. 34. § 822d 2A)

Orange Southwest School District agrees to join the Winooski Valley & Statewide Choice of Public High School Collaborative for the 2026-2027 school year. We will abide by the conditions outlined in the attached Articles of Agreement.

Our high school will agree to accept no more than 15 students and will send no more than 15 students\* for the 2026-2027 school year.

\*\* Please make sure this number agrees with the guidelines provided  
by Act 129 Sec. 34. § 822a.(b)\*\*

For the Board of School Directors of Orange Southwest School District

Signature & Title: \_\_\_\_\_

Dated: \_\_\_\_\_

Please fill in the name of the school contact who will send out & receive applications (usually the Principal or Guidance Director) for your school.

School Contact Name & Position: Alex Easton Registrar

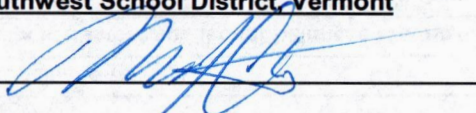
E-mail for School Contact: aeaston@orangcsouthwest.org

## Financial Management Questionnaire - School Districts, Supervisory Unions, Supervisory Districts

| Orange Southwest School Disttict                                                                       | Yes | No | Don't know | By whom                                                 |
|--------------------------------------------------------------------------------------------------------|-----|----|------------|---------------------------------------------------------|
| <b>Do you know by whom the following is maintained?</b>                                                |     |    |            |                                                         |
| <b>School District Checkbook</b>                                                                       | X   |    |            | Linda Lubold/Rachel Bent                                |
| <b>School District receipts</b>                                                                        | X   |    |            | Linda Lubold/Rachel Bent                                |
| <b>Student Activity Cash/Check receipts</b>                                                            | X   |    |            | Kelly Tucker, Stephanie Reyes, Rachel Bent, Lisa Becker |
| <b>School District payments:</b>                                                                       |     |    |            |                                                         |
| <b>Payroll</b>                                                                                         | X   |    |            | Melissa Maxey/Michelle Keyes                            |
| <b>Accounts Payable</b>                                                                                | X   |    |            | Melissa Maxey/Michelle Keyes                            |
| <b>Bank Deposit slips</b>                                                                              | X   |    |            | Melissa Maxey/Linda Lubold                              |
| <b>Bank reconciliations</b>                                                                            | X   |    |            | Linda Lubold/Robin Pembroke                             |
| <b>Are the all bank statement and ledger balances reconciled monthly, by whom?</b>                     | X   |    |            | Linda Lubold/Robin Pembroke                             |
| <b>Does someone other than the treasurer review bank reconciliations?</b>                              | X   |    |            | Robin Pembroke                                          |
| <b>Are checks always written to specified payees and not to cash?</b>                                  | X   |    |            |                                                         |
| <b>Are financial records maintained in a computerized system?</b>                                      | X   |    |            |                                                         |
| <b>Are all payees registered in accounting software?</b>                                               | X   |    |            |                                                         |
| <b>Are all invoices, original, on vendor letterhead or format, with individual invoice number?</b>     | X   |    |            |                                                         |
| <b>Are all payments recorded and mailed with notation to the associated invoice number?</b>            | X   |    |            |                                                         |
| <b>Does the School District hold current W9 forms for all vendors?</b>                                 | X   |    |            |                                                         |
| <b>Does the same individual open the mail and deposit checks?</b>                                      | X   |    |            | Melissa Maxey                                           |
| <b>Are pre-numbered checks used for all bank accounts?</b>                                             |     | X  |            |                                                         |
| <b>Are unopened bank statements delivered directly to the treasurer as received?</b>                   |     | X  |            |                                                         |
| <b>Have you borrowed money from the School District?</b>                                               |     | X  |            |                                                         |
| <b>Do you know of anyone who has borrowed money from the School District?</b>                          |     | X  |            |                                                         |
| <b>Have School Board members attended financial trainings?</b>                                         |     | X  |            |                                                         |
| <b>Do the financial accounting personnel take regular vacations?</b>                                   | X   |    |            |                                                         |
| <b>Have you deposited School District monies anywhere other than a School District account?</b>        |     | X  |            |                                                         |
| <b>Have you deposited any non-School District monies into a School District account?</b>               |     | X  |            |                                                         |
| <b>Is it common practice for staff members to rotate responsibilities or cross train periodically?</b> | X   |    |            |                                                         |
| <b>Are student activity receipts deposited within 48 hours of the event?</b>                           |     | X  |            | RUHS Deposits Twice a Week                              |
| <b>Have you experienced a theft or embezzlement during the last five years?</b>                        |     | X  |            |                                                         |
| <b>Does the School District have written policies and procedures for financial operations?</b>         | X   |    |            |                                                         |

|                                                                                            | Yes | No | Don't know | By whom |
|--------------------------------------------------------------------------------------------|-----|----|------------|---------|
| Does each Town and School District official have copies of these policies and procedures?  | X   |    |            |         |
| Is there a standard procedure to ensure that gate receipts reflect the event's attendance? |     |    | N/A        |         |
| Is interest in School District accounts apportioned to each account?                       |     | X  |            |         |
| Have there been any changes in authorized signatures during the fiscal year?               | X   |    |            |         |
| Has a signature stamp ever been used for any School District account?                      |     | X  |            |         |
| Do you have pre-numbered receipt books for cash payments?                                  | X   |    |            |         |
| Have you attended trainings on recordkeeping?                                              | X   |    |            |         |
| Are any School District financial records maintained in manual form?                       |     | X  |            |         |
| Do you maintain separate pages, columns or running balances for each fund?                 | X   |    |            |         |
| Are checks written by the same individual who approves payments?                           |     | X  |            |         |
| Do you participate in any business which does business with the School District?           |     | X  |            |         |
| Does any employee that you know of participate in any organization as a vendor?            |     |    | X          |         |
| Have you questioned if the lifestyle of any associate reflects their normal income?        |     | X  |            |         |
| Are bank accounts and fund balances reconciled on a monthly basis?                         | X   |    |            |         |
| Does the School District loan money to town employees?                                     |     | X  |            |         |

***As a signer below, I certify to the best of my knowledge that the answers provided in this self-assessment questionnaire are an accurate representation of the operation of the supervisory union, supervisory district, or school district of Orange Southwest School District, Vermont***

Preparer:  Printed Name: Michael Clark

Title: Superintendent Date submitted: December 23, 2025

***As an official of the supervisory union board, I certify that the board has reviewed this questionnaire within two months of receiving it from the superintendent.***

Name: \_\_\_\_\_ Title: \_\_\_\_\_ Date: \_\_\_\_\_

**New Hires**

Anthony Delegato, Facilities

Lucus Hayward, Transportation

**Resignations**

Logan Boule, After School Program

Patricia Dukette, Food Services

Cara Houston, Principal



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## January Board Report

Prepared by Michael J. Clark

8 January 2026

### **RUHS Student Death**

It is with a heavy heart that, prior to December break, I shared with the Orange Southwest School District community the tragic news of the passing of a high school student. Our deepest condolences are extended to the student's family, and I know I speak on behalf of the entire OSSD community when I say that they remain in our thoughts during this difficult time.

In response, the school crisis team worked diligently to support students, faculty, staff, and the broader community. We partnered with our designated agency, Clara Martin Center, as well as Gifford Medical Group and several private mental health providers, to ensure appropriate resources were available. I witnessed the Randolph Union High School community come together to support one another within the walls of the school, and I am deeply proud of the care and compassion shown during this challenging time.

Additional details were published in the December 24, 2025 edition of the Herald.

We recognize that a loss of this nature can evoke a wide range of emotions for individuals of all ages. We encourage anyone who is struggling or who is concerned about someone else to reach out for support. **The Clara Martin Center offers a 24-hour crisis line at 1-800-639-6360.**

### **Superintendent Annual Report Letter (Budget Information)**

As the 2025 calendar year draws to a close and we approach the midpoint of the 2025–2026 school year, I am pleased to share that a great deal of high-quality learning is taking place throughout the Orange Southwest School District (OSSD).

I regularly visit our five campuses and see firsthand students who genuinely enjoy learning—hearing laughter in the hallways and witnessing the excitement and pride in students' eyes as they master new skills and accomplish new tasks. Our teachers enthusiastically deliver



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curriculum in innovative and engaging ways, and parent and community volunteers generously contribute their time and expertise to support the outstanding work occurring across OSSD.

I am grateful for, and proud to be part of, the OSSD school community.

Act 73, passed during the 2025 legislative session, makes significant changes to Vermont's public education system in the areas of governance, funding, accountability, and operations.

The law established a School District Redistricting Task Force charged with recommending up to three new statewide district configurations by December 1, 2025. The Task Force's final report did not propose the anticipated new school district maps outlined in the legislation. Instead, it recommended the creation of Cooperative Education Service Areas, Strategic Voluntary Mergers, and Comprehensive Regional High Schools.

Act 73 also:

- Establishes minimum average class sizes for grades 1–12, with a waiver process through the State Board of Education
- Requires the Agency of Education to recommend statewide graduation standards by January 1, 2026
- Mandates the development of a statewide school calendar beginning in the 2027–2028 school year
- Creates a school construction aid program without dedicated funding
- Modifies State Board of Education appointments to include one member each from the House and Senate

The law transitions Vermont to a foundation funding formula. Under this model, voters will no longer vote on school budgets that remain within the established base amount. The base funding level is set at \$15,033 per student, with weighted factors for disability, English learner status, and economic disadvantage. Act 73 also includes provisions for small and sparse school grants, transportation reimbursement, and a four-year transition period to mitigate fiscal impacts.



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Additionally:

- A homestead exemption will reduce taxable value for households with low and moderate incomes
- Non-homestead properties will be divided into residential and non-residential tax categories
- Tuition will be set at the base amount plus applicable weights, with limited authority for receiving schools to charge up to an additional 5% with approval
- Voter-approved supplemental spending will be allowed through 2037, with the allowable percentage gradually decreasing over time

If Act 73 is fully implemented according to the timeline outlined in the legislation, OSSD would cease to exist after the 2027–2028 school year and would be merged with other districts to form a new district serving between 4,000 and 8,000 students.

## **FY27 Proposed Budget (School Year 2026–2027)**

During the FY27 budget development process, our primary focus was maintaining as many student-centered services as possible while limiting budget growth. As a result, the proposed budget reflects a decrease of \$191.69 or 1.22%, in the cost per equalized student.

This was achieved by limiting the overall expenditure increase to 3.07% while increasing our long-term weighted average daily membership by the equivalent of 28.01 students (a 2% increase).

### **Significant service and budget adjustments include:**

- Transitioning a 0.5 FTE elementary physical education position from grant funding to the local budget
- A projected \$800,000 increase in out-of-district special education placements



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- Eliminating the Assistant Superintendent position and replacing it with a Director of Curriculum and Student Achievement
- Eliminating the Associate Principal position at Randolph Union High School and restructuring responsibilities
- Eliminating the Assistant Director of Special Education position (0.5 FTE local / 0.5 FTE IDEA) and replacing it with an Inclusion Specialist funded through Medicaid surplus and IDEA funds (with sufficient surplus to sustain the position for approximately three years)
- Removing an unfilled OSSD-level interventionist position
- Transitioning teacher laptops to high-end Chromebooks

## Overall Impact

These adjustments result in an estimated cost of \$15,539.41 per equalized pupil, keeping OSSD under the Excess Cost Threshold.

## Preliminary Tax Rate Outlook

Please note that these projections depend on state decisions still under consideration by the legislature. Based on data released with the annual tax letter:

- The OSSD equalized homestead tax rate is projected at **\$1.7561**, a **decrease of 4.22%** from last year's rate of \$1.8301.



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The table below shows the expected tax rate for each of our towns, taking all of the factors discussed above into account.

| Town       | *2025-2026 Tax Rate | CLA    | *2026-27 Tax Rate | Annual   | Monthly  |
|------------|---------------------|--------|-------------------|----------|----------|
|            |                     |        |                   | Change** | Change** |
| Braintree  | \$1.9254            | 62.87% | \$1.9644          | \$97.5   | \$8.13   |
| Brookfield | \$1.5723            | 76.60% | \$1.6123          | \$100    | \$8.33   |
| Randolph   | \$1.2842            | 94.93% | \$1.3010          | \$42     | \$3.50   |

\* Per \$100 of assessed value

\*\* Based on a \$250,000 property value

## Ballot Language

Shall the voters of the Orange Southwest School District approve the school board to expend \$29,159,606, which is the amount the school board has determined to be necessary for the ensuing fiscal year? The Orange Southwest School District estimates that this proposed budget, if approved, will result in per pupil education spending of \$15,339.41, which is 1.22% lower than per pupil education spending for the current year.

## Considerations Surplus and Reserve Funds

In addition to approving the overall budget this March, voters will be asked to determine the use of projected surplus funds. It is important to understand what these funds are and how they benefit both students and taxpayers.

Surplus funds are unexpended monies remaining at the end of a fiscal year. Reserve funds consist of surplus monies that voters have designated for specific future purposes. For example, voters



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often approve transfers to a facilities or building reserve to address maintenance and repair needs without borrowing or increasing taxes.

The OSSD is projecting an unaudited surplus of approximately \$1,800,000 for the 2024–2025 school year.

The OSSD currently maintains an Operational Reserve Fund, which uses surplus funds from prior years to reduce future tax rates. This fund has a current balance of \$1,906,000, with \$753,000 scheduled for use during the 2026–2027 and 2027–2028 school years, and an additional \$400,000 planned for the 2028–2029 school year.

Under Act 73, the OSSD is scheduled to merge into another district beginning in the 2028–2029 school year; however, there is speculation that this timeline may be extended. Given this uncertainty, the lack of clarity regarding the treatment of operational reserve funds in a merged district, and the opportunity over the next two fiscal years to strengthen future financial positions, the administration does not recommend transferring surplus funds from the 2024–2025 school year into the Operational Reserve Fund.

Given the current condition of the school building and the district's proposed capital projects, the administration recommends placing the projected \$1,800,000 surplus into the Building Reserve Fund. Doing so will make funds available for future, unforeseen facility needs or potential new construction and will help reduce future borrowing costs.

## **Brookfield Principal Resignation**

I would like to thank Principal Houston for her dedicated service as Principal of Brookfield Elementary School. Earlier this week, Principal Houston informed us of her decision to resign from her position, effective June 30, 2026. I will be developing and publishing a Brookfield Principal Hiring Advisory Committee and a corresponding timeline in the near future.

In principal hiring processes I have led previously, committees have included faculty, staff, students, parents, and community members. Brookfield community members who are interested in serving on this committee should contact Kyle Southworth at [ksouthworth@orangesouthwest.org](mailto:ksouthworth@orangesouthwest.org) and provide her with their contact information.



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## **2026-2027 Draft School Calendar**

Included with this report is a draft of the 2026–2027 OSSD School Calendar. As a reminder, under current statute each Technical Center Region is required to develop a common calendar consisting of 175 common school days. I have been collaborating with the superintendents of WRVSU and CVSU in developing this calendar, and we welcome all input.

## **Executive Limitation 2.5 Emergency Superintendent Succession**

The Cabinet and I have discussed the Emergency Superintendent Succession Plan and have made meaningful progress. I have identified at least one Cabinet member who has indicated a willingness to serve as Acting Superintendent on a temporary basis should the Emergency Superintendent Succession Plan need to be activated. I will be prepared to share a detailed plan with the Board as scheduled at the February meeting.

## **District Quality Standards**

This year was a pilot year for the the District Quality Standards. Superintendents were required to complete an electronic District Quality Standard Survey for each district they were responsible for. The completion timeline was compressed this year and the data collected will only shown as an aggregate of the entire state. In future years the expectation will be that School Boards will be responsible for completing the survey and data for specific districts will be reported. I completed the survey within the required time frame and relied on feedback from our Business Manager, Directors of Facilities, and our Director of Curriculum and Student Achievement. For the board specific portions of the survey I completed the survey with input from the Board Chair. Included in the packet is the working papers Chair Kaplan and I used to complete the survey.

## **School Choice**

The Orange Southwest School District (OSSD) is a long-standing member of the Winooski Valley and Statewide Choice of Public High School Collaborative. Traditionally, OSSD has agreed to allow up to 15 students to leave Randolph Union High School (RUHS) and up to 15 students to enroll in RUHS under the school choice agreement. Funding for participating students remains with the district in which the student resides. If more than 15 students seek to leave or enroll in RUHS, a lottery is conducted by the collaborative. Historically, only a small number of students have participated each year. Included in the Consent Agenda is a form



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confirming that the OSSD Board approves up to 15 students to leave and/or up to 15 students to enroll in RUHS for the 2026–2027 school year.

---

## **FY 2026–2027 Budget Development Timeline**

### **September 17, 2025**

- Budget timeline and template reviewed with Leadership Team

### **September 17 – October 17, 2025**

- Administrators complete budget templates for their respective areas

### **October 8, 2025 (Public Participation Encouraged)**

- Budget timeline presented to the OSSD Board

### **October 15, 2025 (Public Participation Encouraged)**

- Monthly Community Google Meet with the Superintendent to Review the outcome of the board meeting ([meet.google.com/bco-dimc-wrf](https://meet.google.com/bco-dimc-wrf))

### **October 20 – 31, 2025**

- Budget discussions held with Central Office Leadership and:

- Elementary Principals
- RUHS Administrative Team
- RTCC Leadership
- Raven Program
- Technology Director
- Facilities Director
- Transportation Director
- Special Education Department
- Central Office Staff



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## **November 12, 2025 (Public Participation Encouraged)**

– First draft of the FY27 Expenditure Budget presented to the Board, including preliminary education finance context

## **November 13 – 20, 2025**

– Board feedback shared with Leadership Team; deeper review at November 19 Cabinet Meeting (if necessary)

## **November 19, 2025 (Public Participation Encouraged)**

– Monthly Community Google Meet with the Superintendent to Review the outcome of the board meeting ([meet.google.com/bco-dimc-wrf](https://meet.google.com/bco-dimc-wrf))

## **November 19 – December 4, 2025**

– Ongoing budget development continues

## **December 10, 2025 (Public Participation Encouraged)**

– Second draft of the FY27 Expenditure Budget and draft Revenue Budget presented to the Board

– Tax Commissioner's December 1 Letter expected

– Awaiting LTWADM and CLA data

## **December 11 – 19, 2025**

– Additional Board feedback reviewed

## **December 17, 2025 (Public Participation Encouraged)**

– Monthly Community Google Meet with the Superintendent to Review the outcome of the board meeting ([meet.google.com/bco-dimc-wrf](https://meet.google.com/bco-dimc-wrf))

## **December 17 – January 1, 2026**

– Final revisions and preparation for Board approval

## **January 14, 2026 (Public Participation Encouraged)**

– Final FY27 Budget presented for Board discussion and approval if not finalized at the December 10, 2025 meeting.

– Special meeting scheduled if needed



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## **Mid–Late January 2026**

- Budget data submitted to town clerks for inclusion in town reports

## **February 2026**

- Budget informational meeting

## **March 3, 2026**

- **Town Meeting Day**
- 

Thank you for your hard work, as board members, to support education in Braintree, Brookfield, and Randolph.

# Orange Southwest School District -- FOR APPROVAL

## 2026-2027 School Calendar

| August 2026 |    |    |    |    |
|-------------|----|----|----|----|
| M           | T  | W  | Th | F  |
| 3           | 4  | 5  | 6  | 7  |
| 10          | 11 | 12 | 13 | 14 |
| 17          | 18 | 19 | 20 | 21 |
| 24          | 25 | 26 | 27 | 28 |
| 31          |    |    |    |    |

|         |   |            |   |
|---------|---|------------|---|
| Student | 4 | Cumulative | 4 |
| Staff   | 9 | Cumulative | 9 |

Aug 17-18 New Faculty Orientation

Aug 19-25 In-Service -- (Staff)

Aug 26 First Day of School -- Students

Aug 27-28 Kingergarten Half-Days

| September |    |    |    |    |
|-----------|----|----|----|----|
| M         | T  | W  | Th | F  |
|           | 1  | 2  | 3  | 4  |
| 7         | 8  | 9  | 10 | 11 |
| 14        | 15 | 16 | 17 | 18 |
| 21        | 22 | 23 | 24 | 25 |
| 28        | 29 | 30 |    |    |

|         |    |            |    |
|---------|----|------------|----|
| Student | 21 | Cumulative | 25 |
| Staff   | 21 | Cumulative | 30 |

Sept 7 Labor Day (No School)

Sept 25 Early Release/Half Day In-Service (Staff)

| October |    |    |    |    |
|---------|----|----|----|----|
| M       | T  | W  | Th | F  |
|         |    |    | 1  | 2  |
| 5       | 6  | 7  | 8  | 9  |
| 12      | 13 | 14 | 15 | 16 |
| 19      | 20 | 21 | 22 | 23 |
| 26      | 27 | 28 | 29 | 30 |

|         |    |            |    |
|---------|----|------------|----|
| Student | 21 | Cumulative | 46 |
| Staff   | 21 | Cumulative | 51 |

Oct 12 Indigenous Peoples Day (No School)

Oct 16 Early Release for Fall Conferences

Oct 23 Early Release for Fall Conferences

| November |    |    |    |    |
|----------|----|----|----|----|
| M        | T  | W  | Th | F  |
| 2        | 3  | 4  | 5  | 6  |
| 9        | 10 | 11 | 12 | 13 |
| 16       | 17 | 18 | 19 | 20 |
| 23       | 24 | 25 | 26 | 27 |
| 30       |    |    |    |    |

|         |    |            |    |
|---------|----|------------|----|
| Student | 17 | Cumulative | 63 |
| Staff   | 17 | Cumulative | 68 |

Nov 10 Veterans Day (No School)

Nov 25-27 Thanksgiving Break (No School)

| December |    |    |    |    |
|----------|----|----|----|----|
| M        | T  | W  | Th | F  |
|          | 1  | 2  | 3  | 4  |
| 7        | 8  | 9  | 10 | 11 |
| 14       | 15 | 16 | 17 | 18 |
| 21       | 22 | 23 | 24 | 25 |
| 28       | 29 | 30 | 31 |    |

|         |    |            |    |
|---------|----|------------|----|
| Student | 16 | Cumulative | 79 |
| Staff   | 16 | Cumulative | 84 |

Dec 23-31 Winter Break (No School)

| January 2027 |    |    |    |    |
|--------------|----|----|----|----|
| M            | T  | W  | Th | F  |
|              |    |    |    | 1  |
| 4            | 5  | 6  | 7  | 8  |
| 11           | 12 | 13 | 14 | 15 |
| 18           | 19 | 20 | 21 | 22 |
| 25           | 26 | 27 | 28 | 29 |

|         |    |            |     |
|---------|----|------------|-----|
| Student | 19 | Cumulative | 98  |
| Staff   | 19 | Cumulative | 103 |

Jan 1 New Years Day/Winter Break (cont'd)

Jan 18 Martin Luther King Day (no school)

Jan 29 Early Release/Half Day In-Service (Staff)

| February |    |    |    |    |
|----------|----|----|----|----|
| M        | T  | W  | Th | F  |
| 1        | 2  | 3  | 4  | 5  |
| 8        | 9  | 10 | 11 | 12 |
| 15       | 16 | 17 | 18 | 19 |
| 22       | 23 | 24 | 25 | 26 |

|         |    |            |     |
|---------|----|------------|-----|
| Student | 15 | Cumulative | 113 |
| Staff   | 15 | Cumulative | 118 |

Feb 22-26 February Break (No School)

| March |    |    |    |    |
|-------|----|----|----|----|
| M     | T  | W  | Th | F  |
| 1     | 2  | 3  | 4  | 5  |
| 8     | 9  | 10 | 11 | 12 |
| 15    | 16 | 17 | 18 | 19 |
| 22    | 23 | 24 | 25 | 26 |
| 29    | 30 | 31 |    |    |

|         |    |            |     |
|---------|----|------------|-----|
| Student | 20 | Cumulative | 133 |
| Staff   | 21 | Cumulative | 139 |

Mar 1 & 2 (No School)

Mar 8 Spring Conferences (No School)

Mar 26 Early Release/Half Day In-Service (Staff)

| April |    |    |    |    |
|-------|----|----|----|----|
| M     | T  | W  | Th | F  |
|       |    |    | 1  | 2  |
| 5     | 6  | 7  | 8  | 9  |
| 12    | 13 | 14 | 15 | 16 |
| 19    | 20 | 21 | 22 | 23 |
| 26    | 27 | 28 | 29 | 30 |

|         |    |            |     |
|---------|----|------------|-----|
| Student | 17 | Cumulative | 150 |
| Staff   | 17 | Cumulative | 156 |

Apr 19-23 Spring Break (No School)

| May |    |    |    |    |
|-----|----|----|----|----|
| M   | T  | W  | Th | F  |
| 3   | 4  | 5  | 6  | 7  |
| 10  | 11 | 12 | 13 | 14 |
| 17  | 18 | 19 | 20 | 21 |
| 24  | 25 | 26 | 27 | 28 |
| 31  |    |    |    |    |

|         |    |            |     |
|---------|----|------------|-----|
| Student | 20 | Cumulative | 170 |
| Staff   | 20 | Cumulative | 176 |

May 28 Early Release/Half Day In-Service (Staff)

May 28 Senior Project Defenses

May 31 Memorial Day (No School)

| June |    |    |    |    |
|------|----|----|----|----|
| M    | T  | W  | Th | F  |
|      | 1  | 2  | 3  | 4  |
| 7    | 8  | 9  | 10 | 11 |
| 14   | 15 | 16 | 17 | 18 |
| 21   | 22 | 23 | 24 | 25 |
| 28   | 29 | 30 |    |    |

|         |   |            |     |
|---------|---|------------|-----|
| Student | 9 | Cumulative | 179 |
| Staff   | 9 | Cumulative | 185 |

Jun 11 Last Day for Students if no snow days

1/2 Day In-Service (pm)

Jun 18 Last Day for Students if 5 snow days

1/2 Day In-Service (pm)

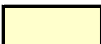
| Key |  |  |  |  |
|-----|--|--|--|--|
|-----|--|--|--|--|

 First Day (students)

 Holidays and Breaks (No School)

 Staff In-Service (No Class)

 1/2 Day In-Service Day (Early Release)

 Last Day (Students) if no snow days/  
1/2 Day In-Service (pm)

 Last Day (Students) if 5 snow days/  
1/2 Day In-Service (pm)