

Phase 2 Report

Interstate School District

Public Consulting Group, Inc.

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PUBLIC
CONSULTING GROUP

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INTRODUCTION

PCG partnered with the Towns of Clarksburg and Stamford in 2018-2019 to conduct a feasibility study to inform the decision-making of a potential merger between the two districts. PCG was charged with presenting multiple options for district consolidation and reorganization across state lines. PCG produced two reports as an outcome of that work. In Summer 2019, informed by PCG's analysis, each town held a Special Town meeting to vote on continued exploration of the merger.

PCG reengaged with the Towns in December 2019 to continue to conduct the research and analysis necessary to move this complicated work forward. PCG conducted over 50 interviews to identify constraints and other factors that may impact merger success. These included multiple conversations with officials from both state education agencies. In addition, PCG reviewed numerous data, documents, and written policies. This report outlines next steps and key decision points if both Towns choose to continue to move forward with the merger.

PCG believes the proposed merger model is both educationally and fiscally sound. Done thoughtfully, both Towns can benefit from the following:

- A single central administration with potential for more efficient and economical operation of school departments
- A coordinated curriculum, kindergarten through grade twelve
- Expanded curricular offerings due to fiscal efficiencies to serve an increased number of students from combined enrollments
- Fuller utilization of teachers and other staff and school facilities
- Opportunity to offer more enrichment within school curriculum
- Opportunity to expand athletic programs and extra-curricular activities
- Coordinated program of guidance, health services, and support services
- A single salary schedule and set of bargaining agreements for staff in each bargaining unit
- A single budget, administered to take advantage of efficient, centralized purchasing techniques and coordinated transportation
- Expansion of critical mass to gain economies of scale and aggregated purchasing power of goods and services
- Opportunity for more administrative capacity at the district and school level
- Expanded offerings that could lead to fewer students leaving the district under School Choice

However, it should be noted that an interstate merger will require focus and initial investments on the part of both Towns to realize these benefits.

During the time of this report, the unprecedented COVID-19 outbreak occurred. The short- and long-term economic ramifications on both communities is still unknown. These new fiscal realities will undoubtedly impact future decisions related to the proposed interstate merger. PCG recommends that these challenges are weighed carefully as decisions are made to proceed.

POSSIBLE SCENARIOS

PCG continued to explore the following scenarios as part of our merger study:

1. Fully merged interstate K-8 school district between the school districts of Stamford and Clarksburg.
2. Tuition agreement between the two districts, with Stamford serving all students PK-2 and Clarksburg serving all students 3-8.
3. No merger. Both school districts remain as-is.
4. No merger. Clarksburg merges with North Adams Public Schools. Clarksburg Elementary School closes. Stamford Elementary School remains as-is.

Given the benefits described above, PCG's report focuses on the required activities and pending decisions required to support a full merger. If an interstate merger does not move forward, PCG recommends further exploration of all other scenarios. Fiscal realities and student enrollment projections require that some type of action occurs as the current situation is not sustainable long-term.

Figure 1. Possible Scenarios

Option Considered	Benefits	Downsides
Tuition agreement between the two districts, with Stamford serving all students PK-2 and Clarksburg serving all students 3-8.	<ul style="list-style-type: none"> • Less administrative burden than a full merger • Fewer “start-up” costs • Achieves educational benefits of merger 	<ul style="list-style-type: none"> • No ability to scale/consolidate services • Reliant on trust between towns to commit to tuition agreement long-term • Leaves Stamford vulnerable to potential forced mergers in the future • Higher transportation costs • Staffing implications, including certification and licensure requirements • No School/Supervisory Union savings
No merger. Both school districts remain as-is.	<ul style="list-style-type: none"> • Both Towns maintain elementary schools in their communities • No new administrative burdens 	<ul style="list-style-type: none"> • Declining enrollments likely to force action in near future • Does not address rising educational costs • Likely continued reduction in educational programming/services
No merger. Clarksburg merges with North Adams Public Schools.	<ul style="list-style-type: none"> • Clarksburg may see some financial savings • Clarksburg may see increased educational options for students 	<ul style="list-style-type: none"> • Clarksburg will lose school in community • Clarksburg will still need to maintain building even if vacant • No benefit to Stamford

PCG also considered regionalization of the North Berkshire School Union (NBSU). If the NBSU were to become a regional school district, all member districts would benefit from 1) state regional transportation reimbursement and 2) additional reimbursement points may be granted by MSBA for regional school building projects. **PCG views the transition to a regional school district among all member districts to be the best-case scenario, as it offers the greatest opportunities for improved operational efficiencies and financial incentives for all.** PCG assumes Stamford Public Schools would then join

this newly regionalized school district. Regionalization, however, would require the full support of all North Berkshire School Union member districts. Member districts are the school districts of Rowe, Florida, Savoy, Clarksburg, and Monroe. If regionalization is pursued, the MA Department of Elementary and Secondary Education can guide the districts through that process.

It should be noted while the original catalyst for this exploration was based on required regionalization efforts by the State of Vermont under Act 46, this external pressure no longer exists. The Vermont State Board of Education's authority to require district governance mergers expired on November 30, 2018. The State has indicated there are no plans to require additional mergers at this time.

PROPOSED MODEL

Stamford Elementary School and Clarksburg Elementary School form a single, unified interstate K-8 school district that is "located" in Massachusetts. All of Clarksburg and Stamford schools' central office functions are consolidated and function as a MA school district. Changes are made to current school configurations. This new K-8 school district is the largest member of the North Berkshire School Union. The intended benefits of this option are both financial and educational.

Stamford Elementary School serves grades PK-2 and Clarksburg Elementary School serves grades 3-8. The model assumes a class size of 19 in grades PK-2 and a class size of 22 in grades 3-8. The model assumes that the merged school district would serve up to 300 students, including school choice students.

- Total of 5 classrooms for up to 95 students at Stamford will be needed initially. This leaves one open for an additional overflow such as PreK, as many Clarksburg families may want to enroll their students in this program.
- Total of 9 classrooms for up to 220 students at Clarksburg will be needed. This leaves 3 open for an additional overflow of students or other programs that may be created with the additional space.
- This plan does not include any combined grades at either school.
- Classrooms located in Clarksburg allow for lower grades such as grades 3 and 4 to be separated from older students.
- A Grade 3 to 8 program in Clarksburg allows for all state testing to occur in Massachusetts schools. This will streamline the testing process for both students and staff.
- A school focused on lower elementary will allow opportunities for specific programming to support early elementary students' educational needs specifically on literacy and mathematics.
- Bringing all students from grades 3-8 together at Clarksburg will also focus on additional needs for older students.

Current student enrollments in both buildings support this model. There are 208 students between both districts, leaving ample room for school choice students to supplement revenues.

Figure 2. 2019-2020 Enrollment with School Choice, Clarksburg

Grade	Current Enrollment	Clarksburg Students	Choice Slots
K	15	8	7
1	22	14	8
2	30	21	9
3	14	8	6
4	20	12	8
5	20	12	8
6	33	25	8
7	22	19	3
8	18	14	4

Grade	Current Enrollment	Clarksburg Students	Choice Slots
Total	194	133	61

Figure 3. 2019-2020 Enrollment with School Choice, Stamford

Grade	Current Enrollment	Stamford Students	Choice Slots
3 yo	13	11	2
4 yo	11	5	6
K	8	8	0
1	6	5	1
2	5	5	0
3	6	6	0
4	9	8	1
5	11	10	1
6	6	6	0
7	8	6	2
8	5	5	0
Total	88	75	13

MERGED DISTRICT ORGANIZATION

MERGER ASSUMPTIONS

1. Stamford Elementary School becomes a full member of the NBSU.
2. Stamford Elementary School is no longer a member of the Windham Southwest Supervisory Union.
3. Additional staff positions will be required to support the increased responsibility of the Union office. These include: Staff Accountant (1.0), Accounting Clerk (.5) and a Facilities Director (.5).
4. Specific job descriptions will need to be rewritten.

ANALYSIS

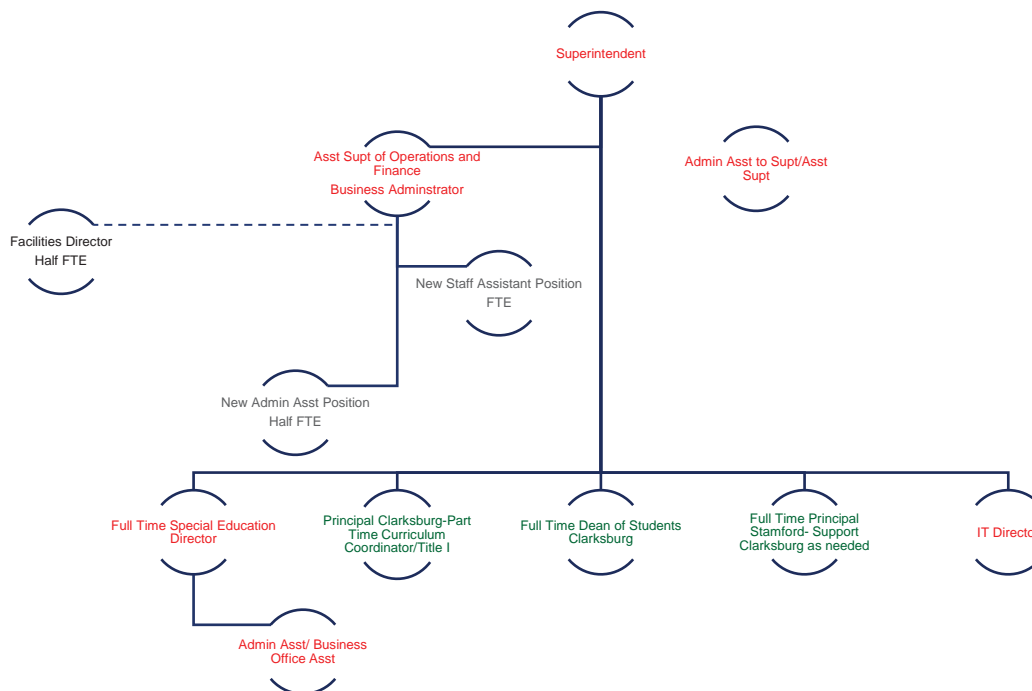
The newly merged District will need additional positions to support both the NBSU financial and operational needs as well as the school needs. Some of the positions being recommended have been discussed by the current administration while others fill a void that will occur as the two districts merge, including two facilities and the implementation of the MA curriculum with new curricular materials. The current NBSU administrative structure is very light compared to its level of responsibility.

1. **Principal/Curriculum Coordinator:** Currently there is no Curriculum Coordinator for Clarksburg, while Stamford's curriculum and assessment are overseen by the SU's Director of Curriculum. The principal of Clarksburg is charged with leading curriculum and assessment efforts for the school. PCG recommends reorganizing the administrative positions. This would include making the Dean of Students position an administrative position, which would ensure s/he would take on greater administrative roles and be available at all times. The current principal's position would become a part time Curriculum Coordinator along with the role of the principal. However, the position would be expanded to year-round, as it currently is a ten-month position. Both the current Dean of Students and the Stamford Principal would support the schools when the principal is focused on curriculum. While a full time Curriculum Director would be ideal, it may be too costly at this time if the other districts of the NBSU do not agree to make the position a member of the NBSU Central Office. However, we believe that the amount of curriculum work is substantial and having a full-time focus would be ideal. Keeping cost in mind, with two other full-time administrators to share the responsibility of the schools and with careful coordination, the role of Principal and Curriculum Coordinator can be initially shared, with consideration of making it a full time NBSU position.

2. **Director of Facilities:** Currently there is no one who is responsible for the Clarksburg School maintenance and upkeep oversight who reports to the School District. All upkeep and maintenance of the school is overseen by Clarksburg since the Town owns the school building. With the addition of adding another school facility, PCG recommends the merged District hire a part-time Director of Facilities. Ideally, this role would be shared with the Town to make it a full-time position and include other districts within the NBSU. The responsibilities of the position would include the overall maintenance of the facilities, development of facility improvement/maintenance plans, oversight of inspections, as well as repairs and improvements for the district's facilities and grounds in order to maintain healthy and safe environments for students, staff, and the community.
3. **Staff Assistant:** With the added staff from the Stamford School District, PCG recommends adding a full-time staff assistant. As previously noted, it would be ideal for the position to be paid for by the NBSU districts, however if not feasible, the position would address both Clarksburg and Stamford school business. The role that the staff accountant would perform includes specialized budgeting and accounting functions.
4. **Administrative Assistant:** The part-time Administrative Assistant would perform a variety of support for accounts payable, accounts receivable, payroll and general bookkeeping, as well as overall office responsibilities, and would provide secondary support for special education.

Complete job descriptions may be found in the Appendix.

Figure 4. Clarksburg-Stamford Merged District Organization Chart



Red: Shared NBSU Position (Current)

Green: Clarksburg/Stamford Paid Positions

Black: New to NBSU

ESTIMATED COSTS

Figure 5. Position and Estimated Salary Range

Position	Estimated Salary Range
Staff Assistant (Full-time)	\$45,000-\$50,000
Facilities Manager (Part-time)	\$25,000-\$30,000
Admin Assistant (Part-time)	\$15,000-\$20,000
Curriculum Coordinator	Between \$10,000-\$15,000 cost for Clarksburg/Stamford to elevate position from 10 month to year-round.

In addition to salaries, there would be a cost for benefits between 25%-30%. Costs will be lower if positions are shared by the Town of Clarksburg or the NBSU. If all positions were to be funded, PCG estimates a total additional cost of \$130,000 which includes an average salary for each proposed position and approximate benefits.

PCG would expect all Towns in the NBSU to see a reduction in their fees paid to the Union based on current costs. Stamford should also expect to see a reduction in fees.

Figure 6. NBSU Allocations: Current Estimates

Town/School	Student Counts	FY21 Cost Allocation	FY21 NBSU Expenses
Clarksburg	198	49%	\$243,521
Florida	84	18%	\$102,643
Rowe	73	17%	\$95,134
Savoy	58	13%	\$78,783
Monroe	11	3%	\$14,835

Figure 7. NBSU Allocations: Estimates Post-Merger

Town/School	Student Counts	FY21 Cost Allocation	FY21 NBSU Expenses (Estimated)	Difference from Current Estimate	Percent Change from Current Estimate
Clarksburg	198	41%	\$221,114	(\$22,407)	-9.2%
Stamford	88	16%	\$84,872	--	--
Florida	84	15%	\$81,522	(\$21,121)	-20.6%
Rowe	73	14%	\$75,938	(\$19,196)	-20.2%
Savoy	58	11%	\$59,187	(\$19,596)	-24.9%
Monroe	11	2%	\$12,284	(\$2,551)	-17.2%

Figure 8. Stamford Allocations to Supervisory Union

Town/School	FY21 WSSU District Assessment	FY21 WSSU Special Ed Assessment	Total Costs to WSSU	Difference from NBSU Estimate
Stamford	\$91,752	\$66,509	\$158,260	(\$73,388)

Note on the above estimates:

- The estimated post-merger calculations assume continued school choice and include existing school choice student counts for Clarksburg and Stamford.
- The estimated expenses are calculated based on the FY21 NBSU budget and are approximations intended to serve as examples of how NBSU allocations could change with the addition of Stamford into the NBSU and not as precise forecasts of expenses or budgets.
- The estimates were calculated based on all other NBSU expenses remaining the same (e.g. staff, utilities, travel, etc.) and the only change being the addition of the Stamford students. Depending on the needs of the additional students, this could cause capacity issues for the existing NBSU staff and could require additional expenses and/or funding for staff positions.
- If the additional proposed positions were funded by the NBSU districts in accordance with the existing allocations, each town/district (including Stamford) would see an increase of approximately 22% over their estimated FY21 NBSU Expenses in the post-merger table above but would still see a decrease in their current NSBU expenses ranging between 0% and 8% depending on the town.
- Stamford Allocations to Supervisory Union does not include school-based special education costs to allow for direct comparison of costs.

REQUIRED NEXT STEPS

1. Reach out to the NBSU to determine which, if any, positions they would consider adding to the NBSU Central Office.
2. Reach out to the Town of Clarksburg to determine their level of interest in sharing a Facilities Director.
3. Using the job description templates, create job descriptions for each role based on whether it will be a shared position or solely a position working for the Clarksburg/Stamford merged district.
4. Reorganize roles and responsibilities for current office staff based on additional positions added to the central office.

GOVERNANCE

MERGER ASSUMPTIONS

1. Clarksburg and Stamford school governance structures will merge into a single, consolidated School Committee.

ANALYSIS

An agreement is needed to determine governance structures that will ensure equitable decision-making for each Town. Decision points include the following: 1) total membership; 2) composition; 3) method of selection for a newly formed school committee.

PCG reviewed district regionalization guidance from the State of Massachusetts, along with the school board structures in the merged NH/VT districts. PCG also reviewed the Hoosac Valley Regional School District Agreement dated October 1, 2019.

PCG recommends the following for the newly formed Interstate School Committee:

- 4 members from the Town of Clarksburg, 3 members from the Town of Stamford
- Committee members are elected at-large during annual Town elections
- At least one member from each Town must be present to conduct any voting once quorum has been met
- Two-thirds vote for annual budget approval and appropriations
- Majority vote on other actions, but requires at least one affirmative vote from both Towns to approve
- One member from each Town is a voting member on the NBSU school committee

ESTIMATED COSTS

There are minimal assumed costs here. School district lawyers will need to draft merger agreement language. PCG also recommends annual board retreats to build a spirit of collaboration and trust between the two communities.

REQUIRED NEXT STEPS

1. Draft Interstate Merger School Committee language with appropriate legal guidance.

FACILITIES

MERGER ASSUMPTIONS

1. Clarksburg makes required facilities upgrades prior to merger.
2. Stamford resolves ownership of building through an agreement with the Town that ensures the building will be owned by the Stamford community.

ANALYSIS

At the very core of this interstate merger is the need to renovate and make mandatory repairs to the Clarksburg School building and ensure the Stamford School building continues to be maintained, while students have safe access to all areas of the facility. Not only are there major physical challenges in Clarksburg, but there are fundamental compliance issues which must be addressed if the building is to remain open.

Clarksburg Only:

- The building is out of compliance with respect to the Americans with Disabilities Act (ADA) and therefore, any plan must include an elevator or lift to address this requirement.
- There are issues with the roof, asbestos encapsulation or removal, student bathroom renovations, and many other repairs necessitated by the lack of proper maintenance over the years.

The Town voted \$1 million under a debt exclusion to begin this progress, of which \$500,000 went to the school. With these funds, there is ongoing work on asbestos removal, the front entrance to address safety issues, and the student bathrooms. However, such a piecemeal approach will not bring the building anywhere near up to code and closure in the very near future is becoming a more immediate reality without a major appropriation from the Town.

Stamford Only:

- While there has been a higher level of maintenance of the Stamford building, there are still maintenance issues that need to be addressed within the school.

EDUCATIONAL CONSIDERATIONS

Beyond the physical problems with the building are the lost opportunities for learning, as well as valuable time lost to attend to facility shortcomings.

- The dual need for the gymnasium to serve as the cafeteria requires daily hours for staff to convert the space back and forth, and the conditions for physical education activities are less than ideal.
- The Town library takes up very valuable square footage to accommodate a handful of residents for services that could be provided elsewhere.

- Pure square footage for programs and student activities does not meet state guidance. Project-based lessons and greater use of technology are two examples of programming in most middle schools across the Commonwealth.
- Middle school students and students receiving special education services are most adversely impacted by current space constraints.
- There is no space for the Town to offer a preschool program. Over 90% of all communities in the Commonwealth offer this option to families.

SCENARIOS FOR RENOVATION

There is a range of options being explored, from new construction to renovations within the existing building. There is also the continued expectation of at least 50% reimbursement from the Commonwealth of Massachusetts through the School Building Assistance program. The 2017 reimbursement rate was 59.5%.

At the very least, the Town of Clarksburg will need to appropriate monies to bring the building up to code. Such an expenditure will be several millions of dollars.

ESTIMATED COSTS

Costs for an addition, renovation, or both will be determined through architect renderings and building project bids.

REQUIRED NEXT STEPS

1. Develop a Long-Range Capital/Maintenance Improvement Plan. Given the uncertainty of current and future budgets, and the complications of COVID-19 that will continue for at least several months, this is a very good opportunity for both Clarksburg and Stamford to take the time to develop long-range capital and maintenance improvement plans. Plans should identify any areas within each school that need to be addressed including a timeline, financial costs, and possible funding resources. Plans should be prioritized based on need and segmented so that the tasks do not overwhelm each school community. The timeline will provide the basis for a realistic outlook at the possibility of the merger based on appropriate and safe facilities for both communities.
2. Review Technology Needs. With the added need for a digital environment for instruction due to COVID-19, it would be beneficial for each school to review its current capacity of technology hardware and available tools for students and staff. Developing or updating Technology Plans will serve both districts well during this on-going health crisis that will continue to impact students' learning.
3. Analyze and Optimize Library Focus for Students. Both Clarksburg and Stamford share a library with their respective communities. Although the issues may be different, both schools should provide an open library for students during the school day. Sharing a library with the community can be challenging, however it should be prioritized for student use during the school day. Although there is a history in both communities of limiting student time in the library during the school day, it is not a best practice. A study from Simmons University showed the average MCAS scores tend to be higher in schools with school library programs, as opposed to schools that do not have school library programs. Their research showed that school library programs are a valuable component of a child's education because they help a child achieve.¹

¹ School Libraries and MCAS Scores. Retrieved from: <http://web.simmons.edu/~baughman/mcas-school-libraries/Baughman%20Paper.pdf>

4. Conduct a Financial Review. Updating, renovating, and adding space to both school facilities will need to have financial backing. It appears Stamford has been able to update the school building without needing additional loans or bonds. The NBSU will need to do an in-depth review of where the Clarksburg School District stands financially as well as its impact on the Town. This review must include doing a gap analysis ensuring all paperwork has been filed, audits have been completed, and address any additional needs from the Town. Before any large expenditure can be considered, the overall financial well-being of both the district and the community must be assessed and a plan should be put into place to rectify any deficits before moving forward.
5. Prepare a Back-up Plan. With the number of areas that need to be addressed within the Clarksburg School facility, it may be wise for both districts to prepare a back-up plan. While the merger may be able to occur, it is clear from all the data collected that the merger will not happen quickly. To address facility issues, Clarksburg must develop a plan of action that will take approval by the citizens to provide the necessary funding.

CURRICULUM ALIGNED TO THE MASSACHUSETTS FRAMEWORKS

MERGER ASSUMPTIONS

1. All students PK-2 would follow the MA Curriculum Frameworks at Stamford Elementary School.
2. All students 3-8 would follow the MA Curriculum Frameworks at Clarksburg Elementary School.
3. All students 3-8 would take the Massachusetts state assessment (MCAS).
4. No students would continue to take the Vermont State Assessment.

ANALYSIS

Both Clarksburg and Stamford follow similar academic standards. Vermont is aligned to Common Core for ELA and Mathematics. The MA Curriculum Frameworks for English Language Arts and Literacy are closely aligned with the Common Core State Standards (CCSS) with some variations in the 2017 version.

Massachusetts released its Science and Technology Engineering Framework in 2016. The standards are broken out into Earth and Space Sciences, Life Science, Physical Science, and Technology/Engineering. The Vermont Science Standards are adopted directly from the Next Generation Science Standards (2013). While both Massachusetts and Vermont were considered Lead Partner states in the development of the Next Generation Science Standards, Massachusetts did not choose to adopt the Next Generation Science Standards as an entire entity, but rather adapted them to build its own Science Standards. There are a lot of similarities between each state's standards, but there are differences as well that will need to be addressed in a deeper crosswalk.

Neither Stamford or Clarksburg has adopted a science text or a kit-based program to teach the standards. However, Stamford uses Discovery Education which offers a digital text and online modules as part of their science program. It is aligned to the Next Generation Science Standards. In addition, teachers supplement material. Clarksburg is currently working on aligning its curriculum to the MA Science and Technology Engineering Framework. At this time, science units are teacher developed.

Both the MA and VT Social Studies Standards have recently been developed and released to their states. As with other curriculum documents, the VT Standards are taken without adaptations from the national standards, College, Career, and Civic Life C3 Framework for Social Studies State Standards (2017). MA developed its own standards in 2018. Although there are similarities between the two documents such as they both include the ELA and Literacy Standards, there are many differences. The approach to the VT Standards includes more flexibility as evidenced by the standards being presented in grade bands K-2, 3-

5, 6-8, and 9-12. The MA Standards, like their other curriculum frameworks, are presented for each grade level PreK-8.

A side by side alignment review for all four content areas between the VT Standards and the 2017 MA Curriculum Frameworks can be found in the Supplementary Curriculum Materials.

With proper school-based planning, PCG sees no concerns with an aligned curriculum K-8 in the new merged district.

Figure 9. Curriculum Alignment Overview – Reading/ELA

Clarksburg	Stamford
<i>Reading/ELA Curriculum Standards</i>	
MA Curriculum Frameworks	The VT Standards for ELA and Literacy have been adopted in totality from the Common Core State Standards (CCSS).
<i>Reading/ELA Current Core Programs</i>	
<p>K-5 <u>Treasures</u></p> <p><u>Treasures</u> was published by McGraw Hill. The last edition was printed in 2011. It was published before the Common Core State Standards (CCSS) were released. In 2012, McGraw Hill published a new K-5 reading series aligned more closely to the CCSS. Therefore, it is difficult to say how closely aligned to the MA Curriculum Frameworks the reading program is.</p> <p>Over the past few years, teachers have been piloting some writing units from the Teachers College Readers Writers Workshop model.</p>	<p>Teachers College Readers Writers Workshop (TCRWP)</p> <p>The reading program is used in districts throughout the country and has an alignment chart that correlates grade level units to the Common Core State Standards (CCSS). Readers Workshop is used in grades K-5.</p>

Figure 10. Curriculum Alignment Overview – Mathematics

Clarksburg	Stamford
<i>Mathematics Curriculum Standards</i>	
MA Curriculum Framework for Mathematics	<p>VT Standards for Mathematics</p> <p>The VT Standards for Mathematics have been adopted in totality from the Common Core State Standards (CCSS).</p>
<i>Mathematics Current Core Programs</i>	
Core Math Program: Engage NY	Core Math Program: NJ Math Units

Figure 11. Curriculum Alignment Overview – Science

Clarksburg	Stamford
Science Curriculum Standards	
MA Curriculum Framework for Science	VT Science Standards The VT Standards for Science have been adopted in totality from the Next Generation Science Standards.
Science Current Core Programs	
Teacher Created Units	Discovery Science

Figure 12. Curriculum Alignment Overview – Social Studies

Clarksburg	Stamford
Social Studies Curriculum Standards	
MA Curriculum Framework for History and Social Science Framework (2018)	VT Social Studies Standards The VT Standards for Social Studies have been adopted in totality from the College, Career and Civic Life C3 Framework for Social Studies State Standards (2017).
Social Studies Current Core Programs	
Teacher Created Units	Harcourt Textbook

ESTIMATED COSTS

Assumed estimated costs for an aligned curriculum including both materials and professional development are listed below for all four content areas. These estimated costs are detailed below. Please note that *all these costs are estimates based on market rates, actual prices will need to be confirmed with vendor.*

Figure 13. Estimated Costs for Professional Development and Materials – Reading/ELA

Item	Estimated Costs
Reading/ELA Professional Development	
Merged District Kickoff Training by Teachers College Reading Writing Program (multiple days)	\$3,000.00+ per day for one trainer. (May not include trainer's expenses.) Assume 3-4 days minimum. Total=\$9,000-\$12,000

Item	Estimated Costs
Teachers College Reading Writing Workshop in NYC	\$850.00+ for multi day workshop. Does not include travel, housing, or other expenses.
Virtual Trainings	Online courses, workshops, and coaching sessions vary in price.
Reading/ELA Materials Cost	
Reading Materials	\$310.00 for units of reading including teacher materials and read aloud trade books for grades K-5. This cost does not include student trade book sets.
Writing Materials	\$239.00 for units of writing including teacher materials and read aloud trade books.

Figure 14. Estimated Costs for Professional Development and Materials – Mathematics

Item	Estimated Costs
Mathematics Professional Development	
Math Training for Eureka DESE PD Provider Registry: This site on the MAESE site contains 23 different providers who will provide on-site Math PD in the Berkshire area.	Pricing unavailable. See vendor site for cost.
Mathematics Materials Cost	
Eureka Math Print Material	\$26.00+ per student
Eureka Digital Suite	\$190 per user for digital suite (curriculum and PD videos)
Copying Material from Internet Sites (Engage NY or NJ Math Units)	Cost of paper, copier, and staff time

Figure 15. Estimated Costs for Professional Development and Materials – Science

Item	Estimated Costs
Science Professional Development Cost	
Curriculum Standards/Map Training: This can be done internally by curriculum team or there are outside vendors that can provide training in the MA Science Curriculum or in new programs. DESE PD Provider Registry: This site on the MAESE site contains 25 different providers who will provide Science PD in the Berkshire area.	Cost will vary depending on the vendor.

Item	Estimated Costs
Science Material Cost	
Discovery Education: Student “Tech book” (K-12)	Student “Tech book” cost: \$45-\$55 for a 6-year subscription
Teacher Created Materials	Cost is determined by materials created and purchased by individual teachers.
Science Kits: They can be used as a supplement or replacement for some teacher created materials.	Range for Science kits with materials is \$250-\$1200 per kit.

Figure 16. Estimated Costs for Professional Development and Materials – Social Studies

Item	Estimated Costs
Social Studies Professional Development Cost	
Curriculum Standards/Map Training: This can be done internally by curriculum team or there are outside vendors that can provide training in the MA Social Studies Curriculum or in new programs.	Cost will vary depending on the vendor.
DESE PD Provider Registry: This site on the MAESE site contains 21 different providers who will provide on-site Social Studies PD in the Berkshire area.	
Social Studies Material Cost	
Harcourt textbooks are outdated and do not align to the newly adopted VT standards or to the MA Curriculum Frameworks. Harcourt was acquired by Houghton Mifflin in 2007, which is now Houghton Mifflin Harcourt or HMH.	HMH Middle School Student (MS) Textbook: \$18.80 HMH (MS) Complete Set with digital component: \$8,827.55
Teacher Created Materials	Cost is determined by materials created and purchased by individual teachers.

REQUIRED NEXT STEPS

Reading Curriculum Recommendations for a Merged District

1. Adopt the Teachers College Readers Writers Workshop Model published by Heinemann. Since McGraw-Hill is no longer updating or publishing the reading series Treasures, it would be difficult to use the program if the two districts merged. Since Stamford has familiarity with the TCRWP reading program and some Clarksburg teachers have piloted units, it would be a better choice to adopt TCRWP for a merged district.
2. Map the current curriculum developed from both districts to determine the gaps or adjustments that have been made by each district. This work can and should be done by grade level teachers as they know the curriculum best. However, the merged district would benefit from a new

Curriculum Coordinator who could oversee and coordinate the effort being done by each grade level between both schools.

3. Conduct an inventory of all ELA curriculum materials aligned to the TCRWP reading model to ensure there are enough materials to implement at two different sites. Once again, this task could be done by classroom teachers and managed by the new Curriculum Coordinator.
4. Train all teachers in grades K-5 in the TCRWP reading/writing model. It is unclear if teachers in either district have been fully trained on TCRWP. Therefore, it is recommended that training for the first year takes place to ensure all teachers are familiar with the program. Since Stamford teachers and Clarksburg pilot teachers have experience using the TCRWP units, the merged district will benefit from a smoother implementation. However, there will be additional professional development needed as the TCRWP reading workshop model is different from the traditional reading program design found in [Treasuries](#).

Math, Science, and Social Studies Curriculum Recommendations for a Merged District

1. Adopt a Curriculum Model.
2. Map the current curriculum developed from both districts to determine the gaps or adjustments that have been made by each district. This work can and should be done by grade level teachers as they know the curriculum best. However, the merged district would benefit from a new Curriculum Coordinator who could oversee and coordinate the effort being done by each grade level between both schools.
3. Conduct an inventory of all curriculum materials including manipulatives and equipment. Once again, this task could be done by classroom teachers and managed by the new Curriculum Coordinator.
4. Train all teachers in grades K-8 in the selected curriculum model selected.

COLLECTIVE BARGAINING AGREEMENTS

MERGER ASSUMPTIONS

1. Teachers would merge both teacher unions into one consolidated group.
2. One collective bargaining agreement to be negotiated for the new district addressing the gaps and overlaps of both salary/benefits and contract language.

ANALYSIS

Both Clarksburg and Stamford have new collective bargaining agreements (CBA). Stamford has a new one-year agreement, which expires at the end of the 2019-2020 school year. The teachers' union and the Windham Supervisory Union are in the process of negotiating a new CBA that is expected to be for 2 school years. Clarksburg has recently completed a multi-year contract, but it was not yet available to review.

PCG met separately with both teacher union representatives. In Stamford, there was one member present. In Clarksburg, there was a team of five members who were part of the focus group. After reviewing a comparison of both CBAs and certification expectations, questions and concerns surfaced. They included:

- **Current Benefits.** The current benefits were greater in the Stamford CBA, would teachers lose their current benefits?
- **Contract Language.** Contract language, such as the number of days in each teacher contract, was different. Would Clarksburg teachers be expected to teach more days? In addition, both planning time and teacher lunches were longer in Clarksburg. Would Clarksburg teachers be expected to align with Stamford?

- **Grade level assignments.** There is no current contract language determining grade level assignments in either CBA. Would there be a process developed to assign grade levels? How would that be equitable?

Additional Issues Outside CBA:

- **Curriculum.** While the expectation is to align to the MA Curriculum Standards, what does that mean about curricular material? Will Clarksburg and Stamford have to change their materials? What would be the process for that?
- **Pension.** There are teachers in Stamford who have been part of the VT Retirement System for more than 20 years. What pension system will teachers be using? Is it possible that teachers would be losing their pension to change over to the MA Teacher Retirement System?
- **Certification.** Stamford teachers are currently certified in VT. What would be the expectation for the teachers to hold a MA certification? What would be the expectation, level of effort to attain the certification, and what will be the cost to the teacher?
- **Change Management.** Teachers, students, and parents from both schools are closely connected to their schools. Changing the school setting would be very stressful for many of the stakeholder groups. What would be the plan to support each group? How could the teachers be involved in that plan?
- **Planning Committee.** Currently there are no teachers on the Interstate Merger Committee. Consequently, teachers are not always well informed or part of the decision-making process. If the merger moves forward, how could teachers be more involved in the Committee's work? How could teacher representatives from both schools be included as members of the Planning Committee?

Figure 17. Differences Between District CBAs

Clarksburg	Stamford
CBA is separate from other Towns' included within NBSU.	CBA is negotiated for all districts within the Windham Supervisory Union.
Prior CBA expired, new CBA will be a multi-year agreement.	Negotiated one-year CBA to align with VT recommendations. New agreement in negotiations for a 2-year contract.
Benefits are in alignment with the Town.	Benefit providers are part of a VT state plan.
Contract language for working conditions are greater than Stamford. Will need to be discussed with CTA members who are concerned about taking steps back.	Contract language for working conditions is less than Clarksburg, however, benefits are greater. Will need to consider options as teachers do not wish to take steps back.

ESTIMATED COSTS

It is difficult to estimate costs for a new collective bargaining unit, as it will be a negotiated agreement between two parties. However, the following are variables that will affect the final cost of the collective bargaining agreement:

1. **Salary Schedule.** Reconciling the differences in the salary schedule may be an increased cost. Stamford's agreement has a different salary step structure than Clarksburg. This includes beginning at Step 3. In addition, Stamford teachers earn less money, but work more days.

2. **Longevity.** Clarksburg teachers have a longevity clause in their CBA. There is no longevity clause in the Stamford CBA. However, there are teachers who would receive longevity due to their length of service.
3. **Health and Dental Benefits.** Currently, Stamford teachers pay less toward their health benefits than Clarksburg teachers do. A significant difference is dental insurance. Currently, Clarksburg teachers pay 100% of their dental insurance while Stamford teachers pay 0%. To reconcile the difference, there may be an increase in cost.
4. **403-b.** Stamford teachers receive an additional retirement contribution to their 403-b account. Currently the amount is 1% of their salary. Clarksburg teachers do not have such a benefit in their CBA.

REQUIRED NEXT STEPS

1. Ensure that representatives from both bargaining groups are part of the planning committee and have an active role in decision-making.
2. Develop a communication plan for each stakeholder group.
3. Reach out to the bargaining representatives for both teacher unions. When districts merge, there will be legal obligations to ensure the process meets state statutes.
4. Complete a crosswalk between both contracts to ensure all gaps between the two CBAs are noted and addressed.
5. Consider forming various subgroups that include members of both schools such as a curriculum committee, change committee, and collective bargaining agreement committee. This will ensure staff are part of the decision-making process.

PENSIONS

MERGER ASSUMPTIONS

1. Current employees will not lose any rights or benefits as a result of the merger. Legislative language will include grandfathering provisions or other corrective language.
2. Future Stamford educators to join the Massachusetts Teachers' Retirement System (MTRS).
3. There will be no change for Clarksburg educators.

ANALYSIS

PCG reviewed benefits and working conditions through the lens of both states' laws and regulations. Analysis included review of the NH-VT Interstate Compact, along with the agreements between existing NH/VT mergers. PCG held conversations with the MA Teachers' Retirement System, the MA State Employees' Retirement System, and the Vermont State Teachers' Retirement System. PCG's analysis centered on the belief that current employees should not lose any rights or benefits as a result of the merger. This goal can only be accomplished by including language in the agreement that is approved by both the Massachusetts and Vermont Legislatures and specifically addresses the unique factors for each employee benefit. Such language may have to include grandfathering provisions or other corrective language.

Pension benefits may be the best example of the complications of assuring at least a maintenance of benefits. The Massachusetts and Vermont Teachers' Retirement Systems have some similar provisions, but there are differences that could turn out to be significant. If we were to consider just transferring all Vermont teachers into the Massachusetts system, oddly enough, there would be educators that could benefit but there would be others that would lose financially. Two factors illustrate the concern. The first is that the Vermont system includes a Social Security benefit and the Massachusetts system does not. Secondly, there is a ten (10) year limit on the number of years that an out of state educator can transfer into the system and there are currently Stamford educators with more than ten years of service. Based on current Stamford staff tenure, this limit will impact 6 staff members.

In keeping with the strong clear preference of the people in both communities, PCG recommends language that requires future Stamford educators to join the Massachusetts Teachers' Retirement System (MTRS). For current Stamford educators, an analysis of the exact benefits for each individual for both the Vermont and Massachusetts systems will need to be calculated and the employee would be able to choose the most beneficial plan. PCG further recommends that the language includes granting Stamford educators full credit for all years of service.

The Massachusetts Teachers' Retirement System has offered, through its Springfield office, to work individually with Stamford educators at the time of the merger to calculate both sets of state numbers to determine the most beneficial option on an individual basis. There are also calculators on both state retirement system websites that can offer an initial picture.

Finally, while there is not legal precedent for another group of educators joining the MTRS, there are two examples of an outside groups joining the Massachusetts State Employees' Retirement System (MSERS). While they were both Massachusetts organizations, the language to be transferred into the State Employees' system is instructive.

See:

Franklin Regional Council of Governments

<https://malegislature.gov/Laws/SessionLaws/Acts/2014/Chapter179>

Berkshire Regional Planning Commission

<https://malegislature.gov/Laws/SessionLaws/Acts/2006/Chapter142>

ESTIMATED COSTS

Costs will be driven by the number of additional VT teachers who ultimately transfer into the MTRS. There is a relatively sizable long-term cost as each employee may collect hundreds of thousands of retirement benefits over a lifetime. There will be the need to determine who assumes these costs.

REQUIRED NEXT STEPS

1. Current Stamford teachers should visit the online calculators to determine a general understanding of which state plan is best for them and share initial preferences.
2. Legal counsel for both school districts will need to consult with their respective Teacher Retirement systems to determine appropriate legislative language.
3. Ensure the legal language in the merger agreement between the two states spells out as much specificity as possible. There could be costly implications for unclear language.
4. Prior to the merger, current Stamford teachers should participate in an individual conversation with the MTRS Springfield office once the legislative language has been defined to finalize preference.

SPECIAL EDUCATION SERVICES

MERGER ASSUMPTIONS

1. All students eligible for special education would receive services under a Massachusetts IEP.
2. Both schools would follow Massachusetts special education state guidance and regulations.
3. The NBSU would provide compliance oversight and special education leadership for all PreK-8 special education services.

ANALYSIS

Given the proposed educational model under this merger where all students follow Massachusetts standards, this same approach should also apply to special education service delivery. PCG also

recommends that Stamford, as part of the Clarksburg School District, would participate in MA special education compliance monitoring. Once a merger moves forward, continued conversations will need to occur with both state special education offices to ensure all details related to state and federal requirements and reporting are understood and resolved.

There are currently 8 students with IEPs at Stamford Elementary school. Full accounting of special education is under the SU.

- The FY21 budget for special education services to the SU is \$227,718.
- Of that, \$66,509 is the SU Special Education Assessment and \$161,209 is the District Special Education Assessment. The District Special Education Assessment covers all costs associated with the school-based special education program, including staff.
- Currently, Stamford high school students receive special education services under a Massachusetts IEP if they attend high school in Massachusetts.

There are currently 41 students receiving special education services in Clarksburg. Special Education budget estimates for FY21 are listed below.

Figure 18. Special Education Budget Estimates (FY21), Clarksburg

Expense	FY21 Budget
Supervision	\$68,892
Teachers	\$51,633
Related Services	\$131,130
Special Education Aides	\$26,596
Total	\$278,251

Space constraints in the current Clarksburg facility reportedly limit options for creating desirable in-district programming opportunities. There is the belief that if such a program were to be created, there may be the opportunity to tuition in students from other districts who would benefit from these services to help support the cost.

There are only a very small handful of students who receive services in an out-of-district setting in both schools. Clarksburg pays \$135,000 in special education tuition, less a \$25,000 circuit breaker reimbursement from the state. Stamford out of district tuition costs are included in their SU assessment. All students in out-of-district settings are considered appropriately placed at this time. There does not appear to be a potential cost saving in out-of-district costs with the merger. However, this should be revisited based on current student profiles both at the time of the merger and annually thereafter.

ESTIMATED COSTS

Costs will vary by student need at the time of the merger. PCG believes there may be some costs savings to Stamford in terms of administrative costs. PCG does not currently see a potential to bring additional students back into the district. Any additional cost for out-of-district placements is charged to the town of residence so will have no overall impact. PCG would encourage both school districts to review policies related to paraprofessional usage (1:1s) as there may be the opportunity for some cost savings. Lawyers from each school district will be required to draft merger language specific to special education.

REQUIRED NEXT STEPS

1. If the merger is approved, continue state level conversations in both MA and VT to assure all state and federal requirements are met. These conversations should include lawyers who are versed in special education.
2. At the time of the merger, review opportunities to bring back any students who currently receive services outside of the district. Conduct this review annually.
3. At the time of the merger, determine if student profiles (and facilities) would support additional in-district programming.
4. Review policies related to paraprofessional usage in both schools to determine if current levels of support are appropriate and necessary.

EDUCATOR LICENSURE REQUIREMENTS

MERGER ASSUMPTIONS

1. All school staff will work under Massachusetts licensure.
2. All current staff are fully qualified for reciprocal Massachusetts and Vermont licensure outside of any required MTELS/assessments.

ANALYSIS

With the merging of the two districts, the licensed staff in Stamford will need to obtain Massachusetts licensure in order to continue in their roles. In addition, several administrative staff members in Clarksburg will need to obtain Vermont licensure to continue in their roles. While both states have reciprocity agreements with each other, Massachusetts requires all licensed educators to pass at least one MTEL exam while Vermont waives the examination requirements for educators who have been working under their Massachusetts license for at least three years. In addition, Massachusetts requires most educators to hold their Sheltered English Immersion (SEI) endorsement which can be obtained by either taking an SEI MTEL or by completing an approved professional development training course.

There are thirteen staff members in Stamford who will be required to obtain Massachusetts licensure: the principal, ten teachers, the school counselor, and the school nurse.

Of these thirteen staff members, eight require the SEI endorsement as a part of the initial license: the principal and seven of the teachers. The physical education, art, and music teachers do not require the SEI endorsement, nor does the school counselor or school nurse.

There are three administrative staff members in Clarksburg who will be required to obtain Vermont licensure: the superintendent of schools, the principal, and the special education director.

Recommendations for State Agreement

According to the MTEL annual report from 2018-2019, the average pass rate for each of the required MTELS for Stamford staff is 65.3%. Based on this average, only eight to nine of the required thirteen staff members from Stamford are expected to pass their MTELS on the first try. This means that several staff members will need to take the MTEL exams multiple times, leading to increased costs for both the exams and their preparation. In addition, of the thirteen Stamford staff members who will require MA licensure to continue in their positions, eleven will have at least three years of experience under their VT license at the start of the 2020-2021 school year. This is the minimum experience required for Initial licensure in MA.

Because of the anticipated barrier of MTEL pass rates, in combination with the collective experience of the Stamford staff, PCG recommends that all Stamford staff members who have at least three full years of experience prior to the 2020-2021 school year be grandfathered into MA certification without requiring additional exams. The two Stamford staff members who have less than three full years of experience will still need to take and pass the necessary MTELS to receive their certifications. This recommendation is

contingent on each of the eleven qualified Stamford staff members holding all other qualifications for MA licensure. All Stamford staff members, regardless of their experience, will still be required to either take a professional development course or pass the SEI MTEL to obtain the SEI endorsement within their first year of teaching in the merged school district.

Figure 19. Massachusetts Licensure Requirements

Initial License Area	Requirements for Reciprocity
Academic (Classroom Teachers)	Bachelor's Degree
	Communications & Literacy Skills MTEL
	Additional MTEs as required
	SEI Endorsement (most subject areas)
	Completion of approved educator preparation program <u>OR</u> possession of at least an Initial license equivalent in VT
Principal/Assistant Principal	Bachelor's Degree
	Communications & Literacy Skills MTEL
	SEI Endorsement
	MPAL Assessments
School Guidance Counselor	Master's Degree in Counseling
	Communications & Literacy Skills MTEL
	Completion of approved educator preparation program <u>OR</u> possession of at least an Initial license equivalent in VT
School Nurse	Bachelor's or Master's Degree in Nursing
	Communications & Literacy Skills MTEL
	Completion of orientation program through the MA Department of Public Health on requirements for delivery of school health services
	Minimum of 2 years of employment as a Registered Nurse in a relevant clinical nursing setting
	Valid license to practice as a Registered Nurse in MA

Figure 20. Specific Massachusetts Licensure Requirements for Current Stamford Staff

Stamford Staff Position	MA License Required	MA SEI Endorsement Required?	Number of MTEs Required
Principal	Principal/Assistant Principal PreK-8	Yes	1 (plus MPAL Assessments)
PreK Teacher	Early Childhood PreK-2	Yes	3
Kindergarten & Grade 1 Teacher	Early Childhood PreK-2	Yes	3
Grades 2 & 3 Teacher	Elementary 1-6	Yes	3
Grades 4 & 5 Teacher	Elementary 1-6	Yes	3
Grades 6-8 ELA & Social Studies Teacher	Middle School Humanities 5-8	Yes	2
Grades 6-8 Math & Science Teacher	Middle School Mathematics/Science 5-8	Yes	2
Special Education Teacher	Moderate Disabilities PreK-8	Yes	3
Art Teacher	Visual Art PreK-8	No	2
Music Teacher	Music: Vocal/Instrumental/General All Levels	No	2
PE Teacher	Physical Education PreK-8	No	2
Guidance Counselor	School Counselor PreK-8	No	1
School Nurse	School Nurse All Levels	No	1

Figure 21. Vermont Licensure Requirements for Clarksburg Staff

Initial License	Requirements for Reciprocity	Notes on Qualifications
Superintendent of Schools	Master's Degree	The current Clarksburg Superintendent meets all requirements for VT licensure.
	At least 3 years working as a licensed PreK-12 educator in MA	
	At least 3 years working as a licensed PreK-12 educational administrator in MA	
Principal	Master's Degree	

Initial License	Requirements for Reciprocity	Notes on Qualifications
	At least 3 years working as a licensed PreK-12 educator in MA	The current Clarksburg Principal meets all requirements for VT licensure.
Director of Special Education	Master's Degree	The current Clarksburg Director of Special Education is retiring, the hiring committee should ensure that the person selected to fill this role meets all requirements for VT licensure.
	At least 3 years working as a licensed special educator, educational speech language pathologist, school psychologist, school counselor, reading coordinator/specialist, principal, or superintendent in MA	

ESTIMATED COSTS

Figure 22. Total Educator Licensure Costs

Massachusetts Licensure		Vermont Licensure	Total Costs
Level of Support	Cost	Cost	
BASELINE: Exams Only All required MTEs and assessments (including SEI MTEs and MPAL Assessments)	\$5,297	\$640	\$5,937
Exams and SEI Courses All required MTEs and assessments (including MPAL Assessments and excluding SEI MTEs) plus SEI PDP courses in place of SEI MTEs	\$7,580	\$640	\$8,220
Exams and Online Preparation Courses All required MTEs and assessments (including SEI MTEs and MPAL Assessments) plus online preparation courses for each participant for each required MTE	\$11,161	\$640	\$11,801
Exams, SEI Courses, and Online Preparation Courses All required MTEs and assessments (including MPAL Assessments and excluding SEI MTEs) plus SEI PDP courses in place of SEI MTEs and online preparation courses for each participant for each required MTE	\$13,444	\$640	\$14,084

Notes on Estimated Costs:

- On the MTEL website (mTEL.nesinc.com) there is an abundance of free preparation materials, study guides, and practice exams available to all. The estimated costs above include additional MTEL preparation courses offered through local colleges and universities at an additional cost.
- The estimated costs for MTEL online preparation courses and SEI PDP courses are based on an average per-participant cost calculated from the publicly available tuition information from six providers. If any Stamford staff member does not need or want to participate in one or more preparation courses, the overall costs would go down.
- The baseline cost of licensure assumes that no Stamford staff members have already passed any of the required MTELEs for their Massachusetts licensure.

REQUIRED NEXT STEPS

1. The first step required regarding the question of educator licensure in this merger is for the two Towns to come an agreement on the language around the grandfathering in of experienced staff from Stamford. If an agreement is not reached, the following are the required next steps for obtaining the necessary licensure:
 - i. All Stamford staff need to create an account through the MA DESE Educator Licensure and Renewal (ELAR) portal as soon as the decision to merge districts is finalized. After creating their accounts, Stamford staff need to complete the following:
 - a. Apply for a Temporary License through the MA DESE site. This license is valid for one year and allows the Stamford staff to continue in their roles while they complete the required MTELEs and other assessments.
 - b. Register for required MTELEs and preparation courses (if necessary/applicable).
 - ii. Stamford staff members whose MA license requires the SEI endorsement should decide whether they want to take the SEI MTEL or enroll in a professional development course. If staff members wish to take the professional development course, they need to find and register for one as soon as possible.

The recommendations for grandfathering of licensure only applies to Stamford educators looking to obtain Massachusetts licensure. The required next step for Clarksburg staff is to submit the necessary paperwork to apply for the required licensure through the VT AO.

TRANSPORTATION

MERGER ASSUMPTIONS

1. The merged district would work under a single, consolidated contract.
2. Collaboration between current providers will be needed to ensure all bus routes can be managed.

ANALYSIS

Dufour Tours Bus Company and Sullivan Transportation provide all transportation for students attending Clarksburg and Stamford schools as well as transportation to Drury and McCann High Schools. Both companies have long standing relationships with the school districts and currently are both under a multi-year contract. Dufour's contract expires in 2023 and Sullivan Transportation expires in 2021. Dufour Tours has offices in both Massachusetts and Vermont and provides transportation to multiple school districts in both states. Sullivan Transportation is a smaller company and only provides transportation to Stamford students.

Dufour and Sullivan have a long-standing relationship. If an Interstate Merger occurs, a representative from Dufour Tours believes that it would be possible to manage the new district's bus runs. However, it would be essential to discuss the new bus routes for the merged district with both companies to ensure

consideration is given to both of the current contractors. This would include designing new routes; ensuring buses and drivers meet the MA state regulations, which is more stringent than VT; and ensuring both companies are included in the discussions.

ESTIMATED COSTS

It is not possible to determine the cost of the bus contract for a merged district as the pricing is determined by actual bus routes. Below is the current cost to each district. The Stamford price is not the actual price of the contract, but the price charged to the district by the SU minus federal transportation revenue received by the Stamford School District.

Figure 23. Current Bus Contract Pricing

District	Current Bus Contract Pricing
Clarksburg	\$140,400 (FY 20)
	\$151,200 (FY21)
Stamford	\$87,241 (FY 20)

REQUIRED NEXT STEPS

1. Reach out to both transportation companies to discuss any areas for collaboration to serve the newly merged district
2. Renegotiate contracts with both transportation companies
3. Plan out bus routes to ensure all three student groups, Stamford, Clarksburg, and the High School, have adequate bus service to ensure safe and timely school arrival.

LOCAL PROPERTY TAXES

SUMMARY OF IMPACTING FACTORS

In the state of Vermont, the greatest impact on a district's homestead property rate is the per-pupil spending for the district, not the school district's total budget increase or decrease. Nonhomestead education tax rates are set by the Vermont state legislature during the previous legislative session and are set to generate enough revenue to support statewide education spending.

In the state of Massachusetts, school funding is more heavily dependent on local property taxes than in Vermont. However, Massachusetts Proposition 2 ½ sets limits on how much local property taxes can be raised in any given year, designed to ensure that towns do not default to property tax increases to balance their budgets. The Massachusetts Department of Revenue sets the levy limit for each town each year based on a calculation of increased community assessed value and new growth.

Summary:

- The merger would have an impact on both Stamford and Clarksburg property taxes, but the extent to which needs to be determined in collaboration with tax lawyers.
- In Vermont, the greatest impact on property taxes in the merger would be the change in per pupil spending in Stamford.
- In Massachusetts, the increased enrollment would impact property taxes in Clarksburg, but regardless of the higher costs associated with the merger, any property tax increase would be limited by the Proposition 2 ½ Levy Limit.

MERGER AGREEMENT LANGUAGE

The next steps in this process will be to draft state legislation and an interstate merger agreement. Lawyers for both Towns should be actively involved in this process. Once language is drafted, language should be reviewed and vetted by both state education agencies.

The below list includes items that will need to be included in the Interstate Merger Agreement Language.

1. Length of agreement;
2. The number, composition, method of selection of the school committee;
3. The terms of office of the school committee;
4. Voting procedures for school committee members;
5. Filling vacancies on the school committee;
6. Electing officers on the school committee;
7. Powers of the school committee and of a transition school committee (if exists);
8. Plan for grandfathering teacher license requirements;
9. Plan for grandfathering of pensions and other benefits;
10. The detailed procedure for the preparation and adoption of an annual budget;
11. Definition of capital and operating costs;
12. Method of apportionment of costs and timeline for payment;
13. Method for incurring debt;
14. Method of amending and terminating the Merger Agreement;
15. Method by which the merged district will provide transportation;
16. Procedures that govern the transition period;
17. Whether the merged district will continue to accept Choice students from other towns;
18. A procedure to close a school building, including required votes;
19. Lease of school facilities not owned by the district;
20. Capital maintenance plans;
21. How to handle existing indebtedness;
22. Periodic review of interstate merger agreement; and
23. Disposition of assets upon termination or withdrawal of a member.

Language needs to include a method by which the merger agreement may be amended and/or terminated. Consideration should be given for what input other towns in the NBSU will have in decision-making related to merger amendments or termination.

Figure 24. Amendment and Termination Methods for the Merger Agreement

Amendment	Termination
<p>The amendment method should include:</p> <ul style="list-style-type: none"> • Time frame; • Who can propose an amendment; • Required approvals; (school committee and towns; majority, unanimous, etc.) • and Effective Date. 	<p>The method by which either member town may terminate the merger should include:</p> <ul style="list-style-type: none"> • Time frame: <ul style="list-style-type: none"> ○ When notice of withdrawal must be provided; ○ How long before the expected effective date; • Conditions of withdrawal or termination; • Required approvals (school committee and towns; majority, unanimous, etc.); and • Method of how assets might be distributed upon termination.

CONCLUSION

It would be impossible to even imagine how everyone's lives have changed in the year since PCG issued the first report on a potential merger between the Town of Clarksburg, MA and the Town of Stamford, VT. The 2019 report, based on a past reality, now needs to be updated and adjusted. It is not just the pandemic that has shifted the conditions.

- The State of Vermont Agency of Education mandate (Article 46) has expired removing a strong incentive for the Town of Stamford to consider alternatives to the options of Bennington or Readsboro, both of which presented difficult and expensive logistical challenges as well as safety concerns.
- There are fundamental and costly facilities renovations the Town of Clarksburg must commit to make to their school building prior to entering into an agreement with Stamford. Fiscal concerns, exacerbated by COVID-19, have stalled progress. Clarksburg will now delay pursuit of the Statement of Interest to the Massachusetts School Building Authority (MSBA) until next year.
- Our work this year has drawn us deeper into the complicated legal details of an Interstate Merger. We recommend that strong legal advice needs to be procured to draft detailed merger language. This is a costly but essential expense if the Towns choose to move forward.
- Finally, there are existing budget issues in both Towns in supporting the current programming at both schools. Reduction in staff was a possibility even without the pandemic. School budgets are likely to further tighten over the next 2-3 years due to the economic impacts of COVID-19.

Our conclusion is that the hurdles that currently exist likely make a viable merger untenable in the immediate future. PCG has concerns that start-up costs for a merger may be more of an expense than either district can bear right now, even if it means a merger will most likely result in longer term savings.

However, we do believe that many benefits of a merger, outlined in this report and in our 2019 report, can still be realized. The leaders and citizens in both Towns need to develop a specific set of action steps to be completed on a timely basis. Such a plan should layout the steps, financial impact and timelines for completion. The options range from a full-blown merger to various aspects being implemented over time in stages.

With all options, PCG strongly encourages the NBSU to continue to explore regionalization, with the potential to bring Stamford in as a member. Regionalization presents the greatest educational, administrative and financial benefits for all communities in the NBSU, including Stamford in the case of a merger. In addition, Clarksburg should continue to consider a merger with North Adams as it could be a fiscally advantageous and necessary scenario, particularly if a building renovation is not realized.

PCG sees the options as follows:

A. A Full Interstate Merger

This option requires major decisions to be made without delay. For the Town of Clarksburg, it will require a multimillion plan for renovations to the school to be formally developed and able to be presented at Town meeting. The plan will need to include the exact impact on the tax rate and be accompanied by a financial audit of the Town finances and the procurement of Bond Counsel. The Town of Stamford needs to resolve the ownership of the building and pursue the cost of building adjustments needed to house students PreK-2. Both Towns need to hire Legal Services to research the many complicated issues cited in this report. These bold, decisive steps, which will require significant preliminary financial support, must be accomplished immediately.

B. Tuition Agreement between the Towns

The ability for Clarksburg residents to be able to fully access the PreK program at the Stamford School and for the Stamford students in the upper grades to access Clarksburg middle school

programs would be a plus for both communities. Our focus groups conducted last year, including with students, revealed the strong broad appeal for both options. However, to pursue tuition agreements will necessitate careful legal review. The legal ramifications are not minor. Does each Town need State approval? Can agreements only exist for certain time periods? Can Stamford students take the Massachusetts Assessments? Does the North Berkshire School Union need to approve? Are there Choice laws in either State that supersede such an arrangement?

C. Each Town Solidifies Current Programs and Facilities

If we have learned anything in the past couple of months, it is how vulnerable we are to circumstances beyond our control. What has been very clear to us in our work, is the natural ties that exist between the Towns and the people of Clarksburg and Stamford. Neighbors will still interact, and the existence of a State line is not a barrier in many other ways. Having connections between the two schools makes good sense and can be realized in stages. Conducting joint teacher workshops for both faculties could happen now. Even sharing experiences on online learning could benefit teachers in both schools. In the true spirit of small communities, the connections between the schools can grow steadier and stronger. There then may come a time in the future when conditions once again allow for pursuit of a full merger and the great benefits to the communities and students of both Towns.

APPENDIX

JOB DESCRIPTIONS

SCHOOL PRINCIPAL/CURRICULUM COORDINATOR

(SAMPLE JOB DESCRIPTION)

POSITION: Principal/Curriculum Coordinator

REPORTS TO: Superintendent

JOB SUMMARY: The Principal/Curriculum Coordinator is responsible for providing educational leadership under the direction of the Superintendent in the areas of curriculum, instruction, assessment, and professional development in the Clarksburg School District. He/She will provide exemplary leadership of the Clarksburg School with the support of the Dean of Students. He/she will work collaboratively with the administrative team and teaching staff to develop a coherent, comprehensive system PreK-8 of quality curriculum integrated instruction, broad-based assessment, and focused professional development that will enhance and document learning outcomes for all students. Working with the Principal, the Curriculum Coord./Asst. Principal will promote a school climate where student learning and staff effectiveness is maximized by providing support to both staff and students daily.

QUALIFICATIONS:

- A Master's degree
- MA certification in School Administration
- Minimum of five years of teaching and/or administration experience
- A record of exemplary instructional practices, a deep knowledge of teaching and learning, an understanding of Common Core, the ability to model best teaching practices, an exceptional work ethic, and ability to work well within a team setting.

ESSENTIAL FUNCTIONS:

- Manages operations of the school and provides leadership for teachers and students within the Clarksburg School.
- Creates and maintains a mission/vision for the Clarksburg Elementary School as well as developing academic goals and instructional supports that align with the mission/vision.
- Works with the leadership team and staff of both the Clarksburg and Stamford schools to communicate instructional beliefs and practices and school performance results to the public.
- Supervises in a fair and consistent manner effective discipline and attendance systems consistent with the philosophy, values, and mission of the Clarksburg School.
- Promotes a safe, orderly environment that encourages students to take responsibility for behavior and creates high morale among staff and students.
- Conducts staff observations, writes evaluations, and provides feedback to staff. Works with administrative team in the interviewing, hiring, and orienting of new staff.
- Guides the development of curricula that are based on clearly defined expectations for PreK-8 student learning at both the Clarksburg and Stamford Schools that are focused on supporting and challenging all students to excel in their learning. Guides the monitoring/evaluating of curricula and necessary revisions.
- Guides the effective implementation of curricula including alignment of teaching practices where needed.

- Facilitates/provides ongoing support for the effective use of research-based instructional practices through staff development programs, vertical/horizontal planning meetings and/or coaching. Coordinates the selection and use of instructional materials, supplies, and assessment tools used in the school.
- Works with the leadership team and staff to develop and implement effective assessment practices and to analyze and disaggregate assessment data to examine the effectiveness of the curricula in addressing the learning needs of all students.

DIRECTOR OF FACILITIES

(SAMPLE JOB DESCRIPTION)

DESCRIPTION: Director of Facilities Management

REPORTS TO: The Assistant Superintendent for Business

JOB SUMMARY: The Director of Facilities reports directly to the Assistant Superintendent for Business. The director's role includes overseeing the physical maintenance and operations of facilities within the Clarksburg/Stamford School District.

STATUS: Part-time (may be shared with the Town of Clarksburg)

QUALIFICATIONS: The qualifications of the position require that the Director of Facilities:

- Has five or more years of successful administrative experience in the facility maintenance field;
- Demonstrates a high level of effective leadership skills;
- Has experience analyzing problems and developing action plans;
- Must have positive interpersonal skills to work professionally with staff and have experience establishing effective and collaborative relationships with community members and other agencies;
- Is knowledgeable of principles and practices related to the management of maintenance, custodial, warehouse, and landscape activities;
- Possesses hands-on experience with HVAC units, electrical, grounds care, buildings, custodial care, carpentry, playground equipment and safety;
- Has a working knowledge of all applicable OSHA, EPA, and MA/VT School Code regulations that apply to the Facilities and Maintenance Department of the school district;
- Clearance of FBI Background Check required;
- Possesses a valid MA Driver's License and is available on call.

ESSENTIAL FUNCTIONS: The specific duties and responsibilities of the Director of Facilities shall be to:

- Use independent judgment in significant matters when coordinating and planning for inspections, recommend repairs and improvements for the district's facilities and grounds in order to maintain healthy and safe environments for students, staff, and the community;
- Supervise the alterations of district facilities;
- Represent the district in day-to-day contacts with contractors, architects, and engineers in connection with facility renovations;
- Interface and coordinate activities with local government agencies as pertaining to the Clarksburg/Stamford facilities and properties;
- Assist in the negotiation and administration of leases of district facilities and facilities used by the school district;

- Plan and direct the building services, including custodial, building maintenance, and grounds maintenance;
- Use independent judgment in significant matters when coordinating emergency procedures affecting building and grounds, including cold weather temperature control and snow removal, and serve and advise the Superintendent regarding school closure;
- Develop and administer a preventative maintenance program for HVAC equipment, playground equipment, and other equipment as needed;
- Develop and administer a vehicle and equipment maintenance/replacement plan;
- Develop and administer a building and grounds use program that makes the district facilities available to the area residents and athletic groups;
- Use independent judgment in significant matters when working with principals to coordinate the short-term and long-range facility improvement plans;
- Work collaboratively with building administrators and staff to ensure a clean and safe environment for all students and staff;
- Conduct regular building inspections for safety, cleaning standards and procedure compliance, coordinates in inspections by insurance companies, fire and police departments, health department, and Education audits;
- Assist in the preparation of the budgets in conjunction with the Assistant Superintendent of Business; and
- Develop and/or coordinate bids, RFPs, RFQs and other purchasing projects or initiatives specific to the department.

ADDITIONAL FUNCTIONS:

- Attend School Committee Meetings as required;
- Responsible for asbestos management plan, district pest management plan, district safety plan, district loss control; and
- Perform other related duties, as assigned, for the purpose of ensuring an efficient and effective work environment as directed by the Assistant Superintendent for Business.

PHYSICAL REQUIREMENTS:

- The usual and customary methods of performing the job's functions require the following physical demands: occasional lifting (should be able to lift up to 20 pounds), carrying, pushing, and/or pulling; and significant fine finger dexterity.

STAFF ACCOUNTANT

(SAMPLE JOB DESCRIPTION)

POSITION SUMMARY: Performs specialized budgeting and accounting functions requiring knowledge of specific budgeting and accounting procedures; researches complex problems to their conclusion; and works with supervisor to assure resolution of such problems; reviews and prepares budgets and fiscal analysis, statements, and reports.

REPORTS TO: Assistant Superintendent for Business

MINIMUM QUALIFICATIONS:

- A minimum formal educational background of a bachelor's degree from an accredited college or university with a major in accounting is required.

- A minimum of two (2) years of accounting experience in public, nonprofit organizations is expected and experience with public educational systems is preferred.
- Familiarity with government fund accounting and current financial software programs is expected.
- Appropriate and acceptable alternatives to these qualifications may be made by the Board of Education.

ESSENTIAL JOB FUNCTIONS:

- Processes bills for payment; reconciles invoices with purchase orders and checks extensions and other calculations;
- Prepares warrants and register sheets;
- Prepares reports showing expenditures by budget classification;
- Maintains records of accounts paid and accounts outstanding;
- Develops and distributes purchase orders;
- Computes payroll for certificated and classified employees;
- Computes payroll deductions as withholding tax, retirement, contributions to health insurance plans, etc.;
- Develops payroll warrants and prepares records of payroll expenditures by budget classification;
- Prepares periodic reports of deductions for retirement, health insurance, professional dues, etc.; posts and maintains employee sick leave and vacation records;
- Posts to and maintains records of cafeteria receipts and expenditures; receives, counts, and deposits receipts from school cafeterias; receives and checks bills for foods, supplies, and services; prepares warrants for the payment of bills;
- Prepares reports of cafeteria financial operations for State and District officials;
- Prepares and distributes requests for price quotations for standard cafeteria items; maintains records of, and prepares bills for community organizations using District cafeteria facilities;
- Posts to and maintains records of receipts and expenditures for Federal projects;
- Computes and records salary, supply, services, and other project expenses;
- Computes Federal Government and District portions of expenditures;
- Prepares vouchers;
- Allocates expenses to appropriate projects;
- Prepares financial reports for projects;
- Prepares payroll warrants for students employed under Federal projects;
- Assigns and checks the work of other staff;
- Uses computer programs and controls the data entry and output functions;
- Performs clerical work involved in the receipt, auditing, and scheduling of data processing materials;
- Operates various peripheral data processing equipment; understands methods, practices, and terminology used in financial recordkeeping work, office methods, practices, and procedures;
- Performs difficult accounting clerical work requiring the use of independent judgment and initiative;
- Posts data and make arithmetic calculations rapidly and accurately; understands and carries out oral and written directions.

ACCOUNTING CLERK

(SAMPLE JOB DESCRIPTION)

POSITION SUMMARY: The Accounting Clerk performs a variety of specialized financial and statistical functions in support of the accounts payable, accounts receivable, payroll, and general bookkeeping, as well as overall office responsibilities.

REPORTS TO: Assistant Superintendent for Business

STATUS: Part-time (20 hours per week)

FUNCTIONS:

- Maintains manual and electronic documents, files, and records (e.g. revolving cash fund, invoices, required financial reports, receipts, etc.);
- Monitors fund balances of assigned programs and related financial activity (e.g. open purchase orders, invoices, etc.);
- Prepares a wide variety of financial information and reports (e.g. monthly/quarterly/annual financial reports, requested query reports, correspondence, memos, absence reports, state and federal reports, state/federal forms, checks, etc.);
- Processes various forms of fiscal information (e.g. purchase requisitions, purchase orders, invoices, timecards, journal entries, state/federal forms, requisitions, accruals, demographics changes, mail, warrants, bank deposits, etc.);
- Reconciles financial information and/or accounts (e.g. accruals, invoices, purchase requisitions, bank statements, purchase orders, posted payments, etc.);
- Researches discrepancies of financial information and/or documentation (e.g. accruals, purchase requisitions, purchase orders, invoices, payroll issues, etc.);
- Assists outside auditors;
- Responds to inquiries from a variety of sources (e.g. vendors, staff, parents, etc.);
- Compiles financial and statistical information;
- Reviews financial information;
- Performs record keeping and clerical functions (e.g. copying, faxing, filing, etc.);
- Assists other personnel as may be required;
- Attends in-service trainings, staff meetings, workshops, etc. as requested;
- Performs related duties as assigned.

MINIMUM QUALIFICATIONS:

- High school diploma;
- Two years of general office accounting experience, including work with bookkeeping, financial, or similar duties requiring regular use of arithmetic and accurate record keeping;
- Ability to verify, balance, and adjust accounts; track and reconcile information between accounts and ledgers;
- Perform arithmetical calculations with speed and accuracy; and
- Operate standard office equipment including using pertinent software application.