

SOUTH BURLINGTON SCHOOL DISTRICT

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To: South Burlington School Board
From: David Young, Superintendent
Date: September 16, 2015
Subject: Superintendent's Recommendation on Master Planning and Visioning (MPV)

1. Introduction

The South Burlington School District has been serving children in grades PreK-12 for more than a half century and is known for its excellent education. The district is made up of three elementary schools, one middle school, and one high school. Over the years, student enrollment has seen a slight decline with increasing variability.

The variability in student enrollment across the grades has caused staffing challenges at the three elementary schools. Some of the challenges are a result of unpredictable student enrollment, particularly with the incoming kindergarten classes, as well as the effects of the No Child Left Behind (NCLB) Act. NCLB has allowed school choice for the students in kindergarten thru fifth grade (K-5) at either Orchard or Chamberlin schools to attend Rick Marcotte Central School. The student fluctuations have, at times, resulted in the need to add staff at one elementary school due to larger than predicted class sizes, while the class sizes at the other elementary schools may have capacity to handle additional students in the same grade.

At the high school, increasing school choice (students coming from communities that do not have a high school) has resulted in some increased staffing needs while our own South Burlington student enrollment has had a slight decrease. Over this period of time, the South Burlington School District has been able to maintain most student course offerings with the exception of the following:

- World Language, specifically French and Spanish, was eliminated beginning in the FY1999-2000 school year at the three elementary

schools serving grades K-5. At the high school, some of the advanced world language programs have been eliminated (Latin) as well as a reduction in some sections.

- Art, music, and physical education staffing levels at the three elementary schools have fluctuated as a result of student enrollment. When a teacher's assignment is reduced to less than full time, that teacher(s) is often assigned to support a portion of another elementary, middle school, or high school class or section, depending on where the least senior teacher in the district was reduced in that content area (art, music, physical education). The outcome has created many scheduling challenges as the need to accommodate and coordinate with two, or in some cases three, schools is needed.
- At the high school, reductions in performing arts offerings (strings, guitar) have occurred.

These reductions were primarily due to budget implications followed by student enrollment fluctuation.

2. Background

In 1998, some 17 years ago, South Burlington School District went through a re-districting process that redefined the boundaries that determine what elementary school (Orchard, Rick Marcotte Central, and Chamberlin) a student would attend. This re-districting process was done as a result of overcrowding occurring at Orchard Elementary School and relief was needed. Seventeen years later, we find ourselves experiencing pressures primarily at Chamberlin and Rick Marcotte Central School, however not from overcrowding. This pressure, as stated above, is due in part to enrollment fluctuations in certain grades in any of the three elementary schools making staff allocations more difficult and more costly; however, the primary pressure is from the city's desired growth and development plan within the tax increment financing district.

The city's desired plan is focused on the development of City Center which affects Rick Marcotte Central School, as it is within the identified area. Also, the effects on Chamberlin School, located within the area of the Burlington International Airport, which has had and continues to see considerable changes with approximately 100 fewer homes as a result of a voluntary home take-over program. The Home Take-over Program is due to the increased noise

levels from the airport jet traffic. As a result of the above mentioned pressures, the school board felt it necessary to reevaluate our educational service, buildings, and the associated grade configurations.

3. Committee Findings/recommendation

As a result of the pressures facing the school district, a task force was formed that was made up of representatives from businesses, parents, teachers, and administrators. The charge of the committee, directed by both the South Burlington City Council and the South Burlington School Board is found in the box below:

School and Community Master Plan Task Force Charge:

Growing pressures on School and City facilities and infrastructure are driven in large part by airport encroachment on residential areas, the desire to develop a vibrant City Center, changing demographics, changing/increasing traffic patterns, and the desire to provide a community-friendly environment. These pressures have raised many questions about what the future holds for South Burlington. The City and District have joined in an effort to outline a vision for South Burlington that responds to these pressures, consistent with community desires. This Master Plan Task Force is chartered by the South Burlington City Council and South Burlington School Board. It will consider options for the future; develop a consensus view on key aspects of South Burlington's future, and make recommendations to the Board and Council on how best to serve the community.

As such, the Task Force is asked to evaluate the current situation for the School District and City and accomplish the following:

- Consider all scenarios and current configuration of the District's schools, including such factors as location and consolidation (Should any schools be relocated? How many elementary schools should there be? How urgent is the need?)
- Recommend facility needs versus current resources
- Consider issues such as demographics, school enrollment trends, legislative initiatives that could impact those trends, and other relevant factors
- Recommend potential alternative uses for current public buildings (Can they be used to house under-resourced needs? Should they be sold?)
- Create a vision/goals for the School District (What does the community want from them?)
- Suggest specific alternatives for reaching the goals. Among the alternatives would be consideration of continuing with the status quo
- Develop criteria for evaluating the range of alternatives and list issues to be considered in applying those criteria. For example, the impact on taxes; potential impacts to student opportunities and outcomes; impact on neighborhood ties to schools; etc.
- Recommend a preferred alternative.

The Task Force is asked to follow a diligent agenda so as to be able to report monthly status to the School Board and City Council and to make its final report to the South Burlington Steering Committee no later than February 2015.

After seven months and many meetings that allowed for active dialog, the committee arrived at two suggested options. A separate Minority Report shared perspective on the process and can be found in Appendix F of the report (see link below). The two options, O and Q, and the Minority Report are summarized below.

Option O:

- Orchard Elementary School K-2, New School 3-5
- Frederick H. Tuttle Middle School 6-8
- South Burlington High School 9-12

Option Q:

- One Elementary School (New School K-4)
- Frederick H. Tuttle Middle School becomes a 5-8
- South Burlington High School 9-12

Minority Report

- The Minority in brief disagrees with the Task Force recommendation of “consolidated Primary and Intermediate (K-2/3-5) campuses and consolidation of our elementary school into one facility.” The Minority Group concluded that “the best option addressing the most important city and school concerns is to recommend moving to two K-4 elementary schools, creating a 5/6 grade house within FHTMS, and working toward elevating all schools to the 21st Learning level, with priority given to the high school.” The full Minority Report can be found in Appendix F in the Master Planning and Visioning Task Force Report. (Link found at the end of this report).

4. Superintendent Recommendation

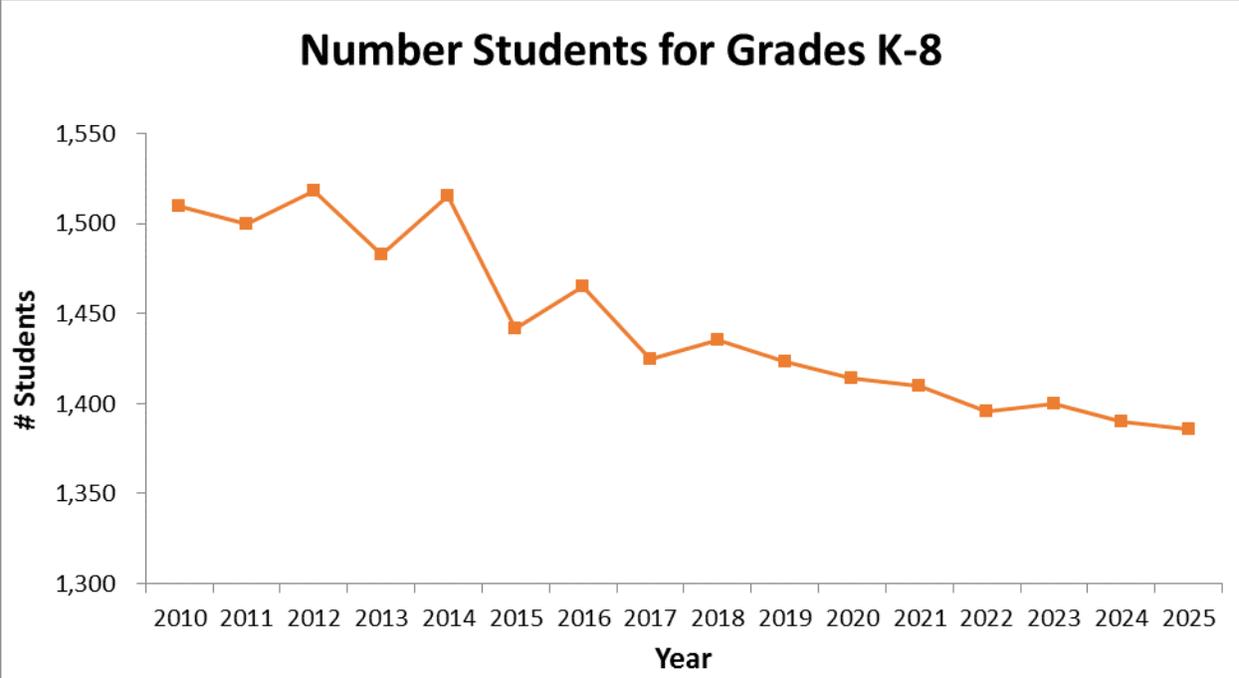
I have worked in the district for ten years and have lived in the community for twenty. During this time, I have developed a more thorough understanding of the factors and dynamics facing the district and city. As the superintendent of this district, with input from my administrative team, I am providing you with my recommendation for your consideration. Arriving at this recommendation, the following were considered:

- Student opportunities needed to support the achievement of our districts goals (ENDS).
- Enrollment status, current and future forecast (birth-twelfth grade).

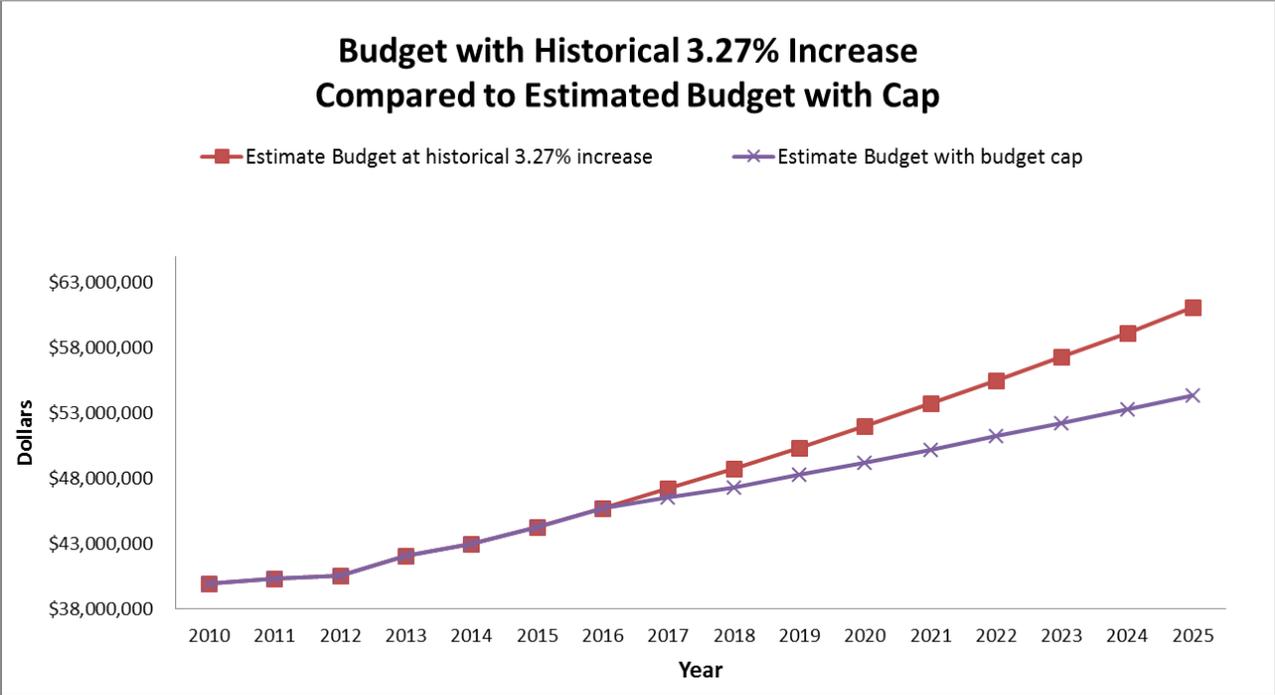
- Budget implications to support student opportunities, student enrollment fluctuations, and community's ability to pay (taxes).
- Historical view of South Burlington budget.
- Current status of bonded debt.
- Status of Facility Stewardship Plan.
- Staffing allocation and needs.
- City's desire to develop a City Center and enhance community opportunities within the City of South Burlington (City Center, Community Library, space for recreation services).
- School safety and security needs and measures.

My recommendation takes the above considerations/desires into account and supports the need for each to be part of what I will refer to as a positive, aggregated benefit moving forward. I feel this proposal supports the South Burlington School District's wants and needs, as well as the city's, and keeps the South Burlington tax payers ability to pay as a major focus.

When I first thought about what I refer to above as the aggregated benefit, I felt the need to be able to view the various factors in a more visible way, to show the impact of the various factors over time in order to help me make a more informed recommendation. (See below)



This graph shows the actual enrollments for grades K – 8 for the period of 2010 through 2016. Also, it shows the projections made in the Cropper Report of December 2014, which is included in appendix B of the Task Force recommendation.



Budget with Historical 3.27% Increase:

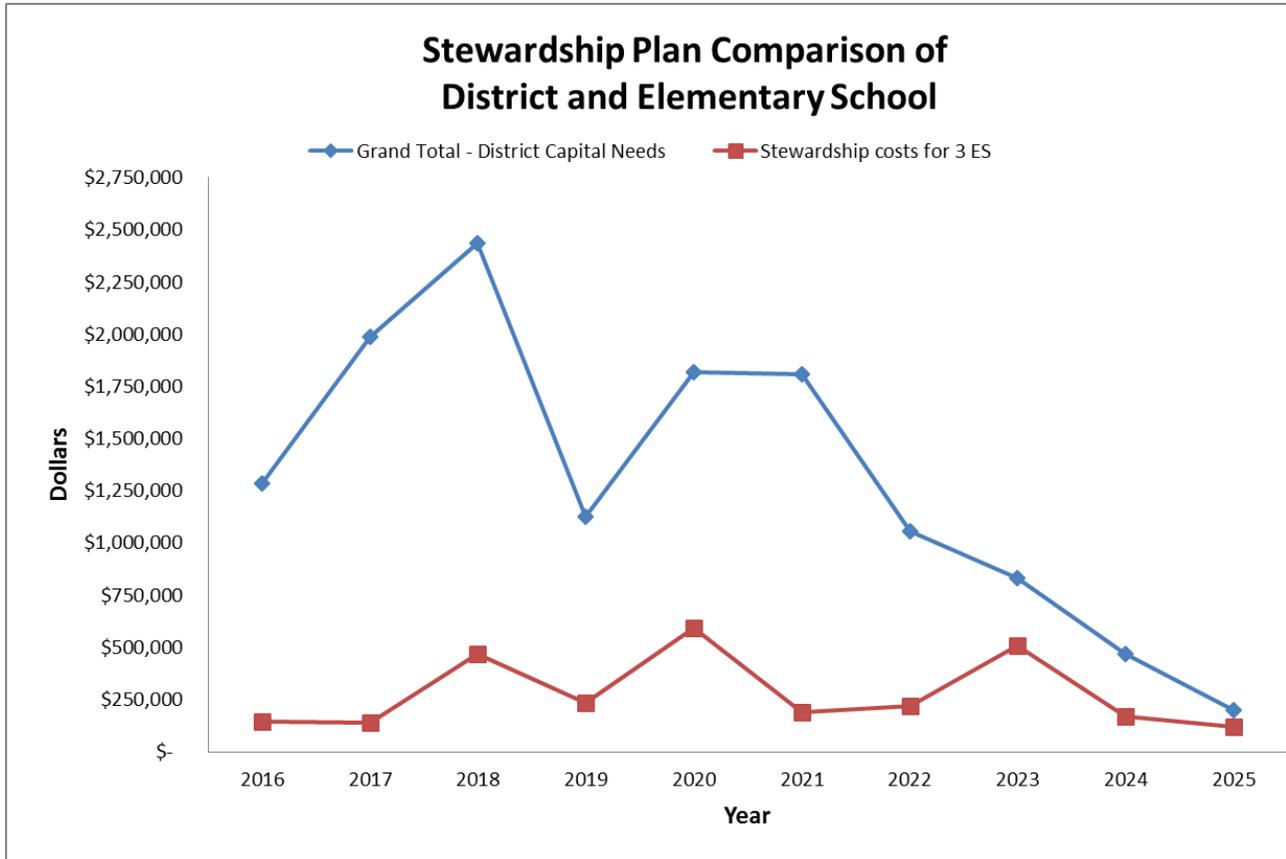
The assumption about future cost increases has been reduced as the result of Act 46 being adopted by the Legislature in May, 2015. The prior analysis used a 3.28% increase per year which is historically about what had occurred. However, lawmakers included a cost containment mechanism that will, for the next two years, cap the statewide education spending increase at 2 percent, 1 percent below this year’s rate of overall increase of 3%. On the local level, the rate of increase will vary from district to district, depending upon a district’s per-pupil spending. So, a district that is a high spender will have little or no room to grow, while a low-spending district will be able to increase its spending by as much as 5.5 percent. South Burlington will be able to increase its spending by 1.72% in FY 2017 based upon spending in FY 2016. This limit is in effect for the next two fiscal years. In the years beyond, we assume that costs will increase by 2.0%.

SOUTH BURLINGTON SCHOOL DISTRICT							updated 9/16/15
Recent History of Budget Votes & Tax Rate Changes							
% Spending							
Fiscal Year	Budget Request	Increase Proposed	Passed/Failed	% Tax Increase	Tax Rate	Change in Tax Rate	
1	2007	\$34,271,049	1.70%	Vote Failed	0.90%	\$ 1.3120	-
2	2008	\$36,742,377	7.21%	charter limit - Board cut \$163K	-2.06%	\$ 1.2850	\$ (0.0270)
3	2009	\$38,250,988	4.11%	passed by 4 votes	5.45%	\$ 1.3550	\$ 0.0700
4	2010	\$39,923,685	4.37%	passed	4.58%	\$ 1.4170	\$ 0.0620
5	2011	\$40,296,044	0.93%	passed	-2.40%	\$ 1.3830	\$ (0.0340)
6	2012	\$40,587,607	0.72%	passed	-0.72%	\$ 1.3730	\$ (0.0100)
7	2013	\$42,106,183	3.74%	passed	2.78%	\$ 1.4112	\$ 0.0382
8	2014 Final *	\$42,986,751	2.09%	passed	7.50%	\$ 1.5171	\$ 0.1059
9	2015 Final *	\$44,297,297	3.05%	passed	6.15%	\$ 1.6104	\$ 0.0933
10	2016 Final *	\$45,747,228	3.27%	passed	0.61%	\$ 1.6202	\$ 0.0098
Average Increase		\$1,275,131	3.28%	Average Increase	2.43%		\$ 0.0342
* This represents the tax rate after action by the Vermont Legislature							
* Budget tax rates presented by the Board based on Tax Commissioner recommendations for FY 2014, 15 & 16.							
	2014	\$42,986,751	2.09%	passed	8.00%	\$ 1.5241	\$ 0.1129
	2015	\$44,297,297	3.05%	passed	8.27%	\$ 1.6425	\$ 0.1254
	2016	\$45,757,228	3.27%	passed	1.62%	\$ 1.6365	\$ 0.0261

This chart shows the total budget, and the amount and % change in spending for the years of 2007 through 2016. It also shows the tax, and the change and % change for this same period of time.

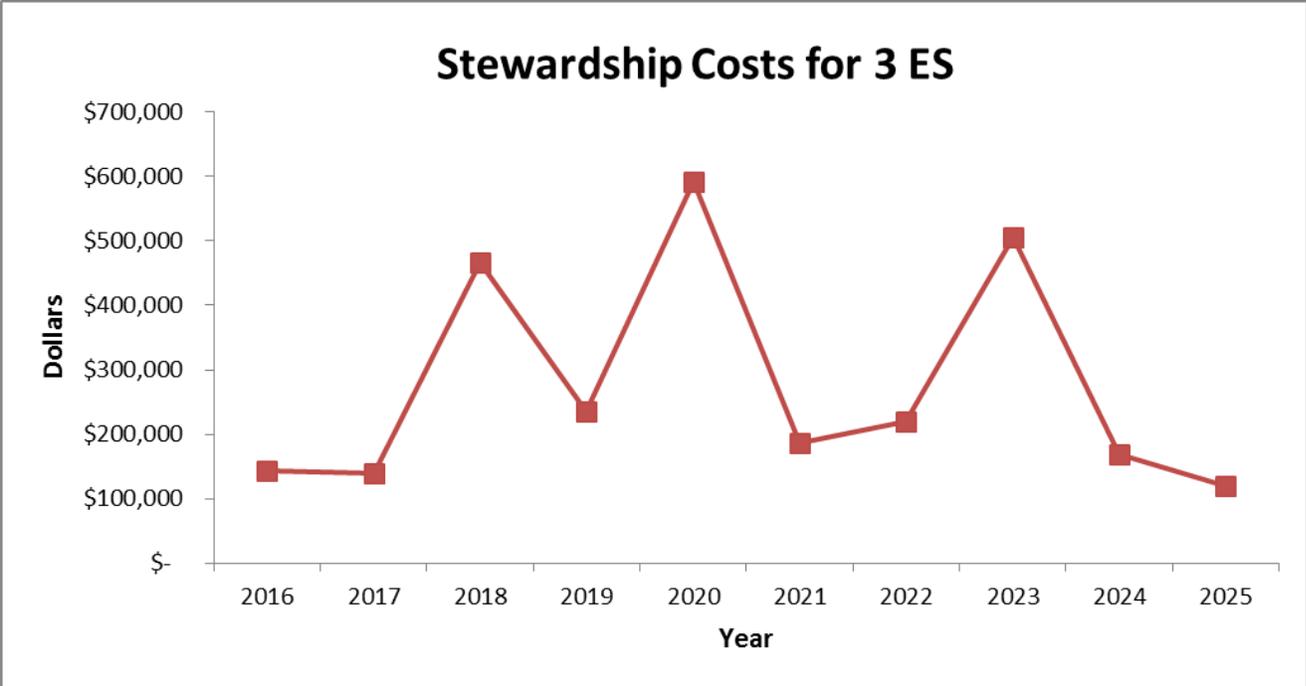
The average increase in the budget for this period was \$1,287,131 with an increase of 3.28% for this time period. During this time, the average tax increase

was 2.43%. The Legislature has the final say on the statewide tax rate and in the past three years, the final approved tax rate was less than the District’s estimate made to voters.



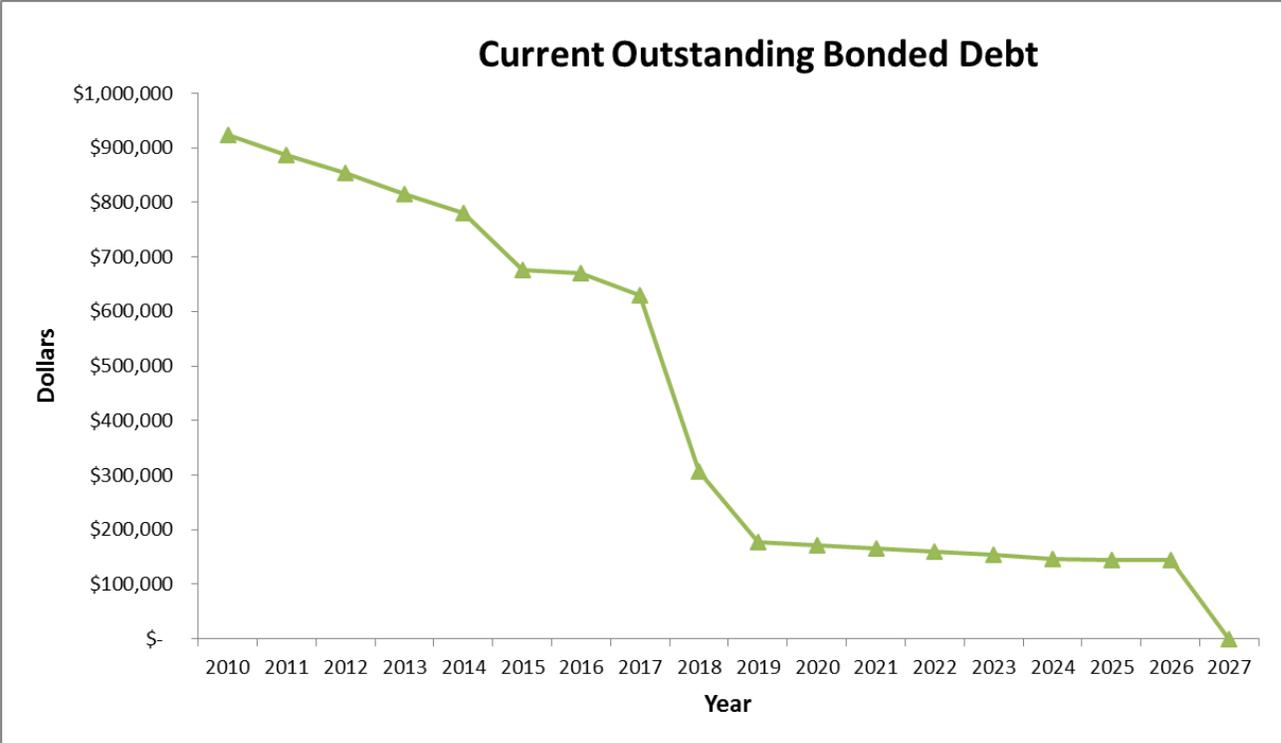
Total Stewardship Facility Project Costs:

The plan for the district has been updated since the Task Force looked at the projected costs. There is a considerable amount of cost associated with the playing fields that has been given a high priority in the short-term. This includes new field turf, a new running track, restrooms, and the reworking of the practice football field. In addition, the estimates to follow through and finish widow replacement and restroom upgrades have been updated to take into account the large expense of cleanup and remediation of asbestos, pcb’s, and other hazardous materials.



Stewardship Costs for the Three Elementary Schools:

The costs for the 3 elementary schools are shown in the graph above. The total costs of projects for the years 2016 – 2019 is \$985,324. The projected costs of projects for the years 2020 – 2025 amounts to \$1,794,498. Included in these costs are roof replacements, parking and driveway repaving, new controls and wiring for the HVAC systems, and boiler/burner replacement.



Current Outstanding Bonded Debt:

The District’s liability for bonded debt is extremely low at this time which is very favorable. In addition, another aspect of Act 46 is that it provides for an exemption for bonded debt payments from the penalty for spending over the cap. In other words, the cap does not apply for increases in debt used to finance facility stewardship projects. In the past, most projects have been financed in the operating budget. However, future projects should be paid for with bonds to avoid double taxation associated with this cap.

KEY STAFFING NEEDS				
Change in Key Personnel Resources - Elementary Consolidation				
	2016	2020		
<i>Based Upon FY16 Budget Data</i>	3 Schools	1 School		
	FTE's	FTE's	Change	
Administrators				
Principals/Co-Principals	3.0	2.0	(1.0)	
Asst. Principal/Behavioral Specialist	-	1.0	1.0	
Total Administrators	3.0	3.0	-	
Administrative Support	5.0	3.5	(1.5)	
Classroom Teachers			-	
Marcotte	19.0	-	(19.0)	
Chamberlin	14.0	-	(14.0)	
Orchard	20.0	-	(20.0)	
New School	-	45.0	45.0	
Total Teachers	53.0	45.0	(8.0)	
Educational Support Services				
Special Education - Consulting Teachers	12.0	10.0	(2.0)	
Special Education - Paraeducators/Intervention	39.5	39.5	-	
Speech & Language Pathologists	3.0	3.0	-	
Total Educational Support Services	54.5	52.5	(2.0)	
Curriculum, Instruction & Assessment				
Literacy & Math Support	8.5	8.5	-	
ELL Teachers	3.6	3.6	-	
Total Curriculum, Instruction & Assessment	12.1	12.1	-	
General Education Paraeducators	8.0	7.0	(1.0)	
Visual/Performing Arts and PE				
PE	2.7	2.0	(0.7)	
Art	2.8	2.0	(0.8)	
Music	2.7	2.0	(0.7)	
Total Visual/Performing Arts and PE	8.2	6.0	(2.2)	
Custodial Help				
Head Custodians	3.0	1.0	(2.0)	
Custodians	6.0	5.0	(1.0)	
Total Custodial	9.0	6.0	(3.0)	
Library Personnel				
Librarians	2.6	2.0	(0.6)	
Media Center Assistants	2.7	2.0	(0.7)	
Total Library	5.3	4.0	(1.3)	
Health Services				
Nurses	2.7	2.0	(0.7)	
LPN (aide)	0.6	1.0	0.4	
Total Health Services	3.3	3.0	(0.3)	
Guidance	4.0	4.0	-	
Subtotal - Changes from consolidation	165.4	146.1	(19.3)	
Plus: World Language offered to 5th Grade	-	2.0	2.0	
Total	165.4	148.1	(17.3)	

KEY STAFFING NEEDS				
Changes in Key Personnel Resources - Move 5th Grade to FHTMS				
		2016	2020	
<i>Based Upon FY 2016 Budget Data</i>		6 - 8	5 - 8	
		FTE's	FTE's	Change
Administrators				
	Principals/Co-Principals	1.0	1.0	-
	Asst. Principal/Behavioral Specialist/Student Activities	2.0	2.2	0.2
	Total Administrators	3.0	3.2	0.2
Administrative Support				
		2.4	3.0	0.6
Teachers				
		24.0	32.0	8.0
Educational Support Services				
	Special Education - Consulting Teachers	8.0	9.0	1.0
	Special Education - Paraeducators/Interventionists	6.0	7.0	1.0
	Speech & Language Pathologists	1.0	1.0	-
	Total Educational Support Services	15.0	17.0	2.0
Curriculum, Instruction & Assessment				
	Literacy Support	0.5	1.0	0.5
	Math Support	-	1.0	1.0
	ELL Teachers	1.0	1.0	-
	Total Curriculum, Instruction & Assessment	1.5	3.0	1.5
General Education Paraeducators				
		1.7	2.0	0.3
Technology Education Teacher				
		1.4	1.4	-
Family Consumer Science				
		0.8	0.8	-
World Language Teachers				
		4.0	4.0	-
Visual/Performing Arts and PE				
	PE and Family Living	3.0	3.5	0.5
	Art	1.8	2.3	0.5
	Music	2.5	3.0	0.5
	Total Visual/Performing Arts and PE	7.3	8.8	1.5
Custodial Help				
	Head Custodians	1.0	1.0	-
	Custodians	5.0	5.0	-
	Total Custodial	6.0	6.0	-
Library Personnel				
	Librarians	1.0	1.0	-
	Media Center Assistants	1.4	1.4	-
	Total Library	2.4	2.4	-
Health Services				
	Nurse	1.0	1.0	-
	LPN	-	1.0	1.0
	Total Health Services	1.0	2.0	1.0
Guidance				
		1.8	2.3	0.5
	Subtotal - Changes due to 5th grade move to FHTMS	72.3	87.9	15.6
Plus: World Language offered to 5th Grade				
		-	0.5	0.5
	Total	72.3	88.4	16.1

20 th century	21 st century
<ul style="list-style-type: none"> • teaching efficiency • teacher centered • teacher dispenses knowledge • knowledge is discrete • content is paramount • emphasis on math/linguistic skills • project learning for those not suited for academic instruction • one instructional strategy for all • student sharing is cheating • talk teaching • anonymous groupings 	<ul style="list-style-type: none"> • effective/Authentic learning • learner centered • learners construct knowledge • knowledge is integrated • process is critical to learning • multiple intelligences • project learning for all • personal learning plans • cooperative learning • student discovery • intentional groupings of 150+/-

The phrase 21st Century Learning has taken on many different meanings. The chart above shows some of the differences.

The charts above allowed me to plot out the specific history of the various areas and has allowed me to see, more clearly, the factors and the corresponding prognosis of making significant changes to the configuration of the district. (Five schools, same grades and staff.)

Given the factors noted above, and the more detailed analysis found within the attached appendixes, I conclude that the best option for the board to consider is:

Option Q which is to build one new elementary school that would serve students in PK-4, with the middle school (Frederick H. Tuttle Middle School) serving students in grades 5-8 (an addition would be needed to accommodate fifth grade and rectify the identified shortfall in gym space). At the high school, I would also recommend that the identified areas of need be worked into this plan. (Gym space, cafeteria space, and others as identified in the feedback received from the NEASC report.)

While I believe this recommendation is the most appropriate option, I believe the process must be done in phases.

Proposed Phases and Timeline

Phase 1 (Sept-Dec 2015)

- Work with real estate investment advisors to validate our attached assumptions and have them assist and advise us on other professional recommendations and options.
- Design a community survey, as recommended by the Task Force, which would solicit feedback from the community on the above recommendation and rationale.
- Work with real estate investment advisors to assist us with options. Options could include:
 - Writing a Memorandum of Understanding (MOU) with the city that could include but not be limited to:
 - City's desire and need of the Rick Marcotte Central School with associated cost benchmarks.
 - City's desire and need to also acquire the Orchard and Chamberlin Schools.
 - Land acquisition from the city for the school district to support one elementary school.
 - Funding options to include the school district receiving:
 - % of local option tax on associated property that would help lessen property tax burden.
 - % of sale of any of the school properties.
 - Write a Request for Proposal (RFP) to elicit developer interest in Rick Marcotte Central, Orchard, and Chamberlin Schools.
 - Review architectural estimates of new construction in detail.

Phase II

- Work with real estate investment advisors to assess forecasted financials, assess viable options to address needs at the high school, based on identified NEASC and learning opportunity shortfalls.
- Public vote on the proposed plan (March-August, 2016).

Phase III

- If vote passes, begin pre-construction process (Design, Build) September 2016-July 2017.

- Begin Construction September 2017- July 2019, with the goal to be in the new school by August 1, 2019.

Summary

- I believe this proposal to be the one that will best serve the district for many years to come; similar to the decision that was made some 52 years ago when South Burlington chose to build its own high school. I believe this proposal is:
 - Sensitive to our student needs and will enable a return of our world language program that was eliminated some years ago.
 - Welcomes our fifth graders into the middle school while being sensitive to their developmental learning needs and provides an opportunity for increased focus on math, science, visual and performing arts, and technology within a vibrant learning space.
 - Improve overall school safety, as a new building would be built with the newest design and systems included.
 - The new school would be constructed in a way that would ensure the feel of small learning communities even though the school would be larger than what we have now.
 - Bring our student learning community together earlier, allowing for enhanced relationship opportunities.
 - Allow for additional opportunities for teachers to work together, share, and learn without traveling conflicts.

Supporting Documentation

Current Status/Facts (Ctrl click on each topic to follow link)

- [Master Planning and Visioning](#)
- [Stewardship Plan \(Condition of the Buildings and Properties\)](#)
- [21st Century Learning Environments](#)
- [21 Century Learning defined](#)- Here is a link to a trailer for the film:

<https://www.youtube.com/watch?v=nA1Aqp0sPQo>

<http://www.edweek.org/tsb/articles/2010/10/12/01panel.h04.html>