

REC'D FEB 27 2009

ALTERNATIVE PLAN SUBMITTAL SHEET

School Administrative Unit Submitting Alternative Plan:

- MSAD # 29

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Date Plan Submitted by SAU: 2/27/ 2009

The intent to submit an alternative plan has been approved by the Commissioner in the approval of the Notice of Intent?

YES

NO

(If NO, please explain.)

Alternative Plan Cover Sheet

(Please attach Alternative Plan as Exhibit A)

Plan Requirements				
	C	IP	NS	NA
Item				
Plan addresses how the SAU will reorganize administrative functions, duties and noninstructional personnel so that projected expenditures of RSU in fiscal 2008-2009 for the following areas will not have an adverse impact on the instructional program.				
system administration	X			
transportation	X			
special education	X			
facilities and maintenance	X			
Plan addresses how cost savings will be achieved in fiscal 2008-2009 for the above four areas.	X			
Parameters for Plan Development				
Enrollment meets requirements (2,500 except where circumstances justify an exception)	X			
When viewed in conjunction with surrounding proposed units, may not result in one or more municipalities being denied the option to join an RSU	X			
Includes at least one publicly supported high school	X			
Consistent with policies set forth in section 1451	X			
No displacement of teachers	X			
No displacement of students	X			
No closures of schools existing or operating during school year immediately preceding reorganization, except as permitted under section 1512	X			

¹ Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on the next page.

**MSAD #29
PROPOSAL FOR ALTERNATIVE PLAN**

A. Introduction

The Board of Directors believes that MSAD #29, with a current enrollment of 1,296, qualifies for an exception to the 2,500 student requirement for the following reasons:

- MSAD #29's schools enjoy a high level of support from the community; student enrollment has remained stable; and the district is sustainable as an independent unit, particularly because it is located in the service hub of southern Aroostook County.
- MSAD #29 is an efficient school unit and has current and planned initiatives to achieve further cost savings.
- Although MSAD #29 officials demonstrated due diligence and good faith in the reorganization planning process with MSAD #70, MSAD #25, MSAD #14, CSD #9, Bancroft, Hersey, Moro Plantation and Orient, the voters in all of these school units rejected the reorganization plan on November 4, 2008. (Subsequently, MSAD #29's former consolidation partners attempted to form an AOS, but this was also defeated at the polls on January 27, 2009).

B. MSAD #29 Qualifies For An Alternative Plan Because Circumstances Justify an Exception to the 2,500-Student Minimum and Its Continuation As A School Administrative Unit Is Consistent With The Purposes And Goals Of The Reorganization Law

The consolidation law states that a school administrative unit will qualify for an alternative plan if it serves fewer than 2,500 students:

- Where circumstances relating to one or more listed factors justify an exception to the requirement of 2,500 students. In MSAD #29, the following factors support approval of an alternative plan:
 - Demographics, including student enrollment trends and the composition and nature of the community;
 - Economics, including existing collaborations to be preserved or enhanced and opportunities to deliver commodities and services to be maximized; and

- Other unique circumstances, including the need to preserve existing or developing relationships, meet the needs of students, maximize educational opportunities for student and ensure equitable access to rigorous programs for all students. [See P.L. 2007, Chapter 240, Section XXXX-36 (2)(B)(3) and (6(A).)];

and

- Where the plan would be consistent with the policies set forth in 20-A M.R.S.A. Section 1451, including:
 - **Opportunity.** Equitable educational opportunity for all students to demonstrate achievement of the content standards of the State's system of learning results
 - **Programs.** Rigorous academic programs that meet the requirements of the system of learning results established in section 6209 and that prepare students for college, careers and citizenship;
 - **Delivery.** Uniformity in the delivery of academic programs that meet the requirements of the system of learning results established in section 6209;
 - **Sustainability.** The efficient use of limited resources in order to achieve long-term sustainability and predictability in the support of public schools;
 - **Public funds.** Effective use of the public funds expended for the support of public schools by means of:
 - A. The creation of cost-efficient organizational structures; and
 - B. Administrative structures and efficiencies that permit the organized and regular delivery of uniform state-sponsored professional development programs to promote coherence and consistency in the understanding and application of the State's standards-based system for continuous improvement in student achievement.

The balance of this plan demonstrates in greater detail why MSAD #29 meets the above criteria for approval of an alternative plan.

An alternative plan must also include a plan to reorganize administrative functions, duties and non-instructional personnel so that projected expenditures

of the school unit in fiscal year 2008-2009 for system administration, transportation, special education and facilities and maintenance will not have an adverse impact on the instructional program. Although the law refers only to the current school year, this plan describes initiatives that will continue next year and beyond.

1. Stakeholder Support/Sustainability

The citizens of MSAD #29 are strong supporters of the schools and they see their public schools and students as a significant source of pride for the community. School budgets are routinely supported by the community at large. This community support was evidenced most recently in the successful outcome of the budget validation referendum in May 2008.

Another significant indicator of community support for the schools is the ongoing project to renovate and expand Houlton High School's antiquated fine arts facilities into a performing and visual arts facility that will serve not only students, but also citizens and arts/community organizations throughout the region. Citizens approved a \$2.5 million bond to support this project in November 2007. Since then, this funding has been supplemented by a public-private fundraising partnership, which has raised approximately \$1 million more so far for this project. Groundbreaking is expected later this spring. Not only does this demonstrate support for the schools, the project is a model of collaboration between the schools, the Town of Houlton and local arts organizations.

It is also important to note that MSAD #29 is centered in Houlton, the service and cultural hub of southern Aroostook County. Located just off I-95, Houlton is a busy border crossing and port, and contains many of the region's employers. Houlton is the third-largest town in Aroostook County, and while the County's population has been on the decline (as has the population in many Maine counties), Houlton's population has remained relatively stable.

2. DOE Targeted Cost Centers

MSAD #29 has been vigilant in keeping costs down as much as possible and its budgets in the targeted cost centers are below or close to the EPS-recommended funding levels. Overall, the school budget for 2008-2009 \$2,338.00 lower than the 2007-2008 budget.

a. No Adverse Impact on Instructional Program

The administration and the Board of Directors thoroughly examined MSAD #29's educational services and the needs of students, and the 2008-2009 school budget was developed to preserve and enhance the educational program, while reducing other costs where possible. The administration and the Board believe that the budget is fiscally responsible, and at this point more than halfway through the fiscal year, it is clear that there has been no adverse impact on the instructional program

System Administration

2007-2008 Budget	2008-2009 budget	Projected Savings	Percent of decrease
\$ 308,290.	\$ 257,200	\$ 51,098.	17%

Substantial Reductions are:

- | | |
|-------------------------------------------------------|----------|
| 1. A full-time receptionist/accounts payable position | \$25,920 |
| 2. Legal fees budget decreased | \$15,000 |
| 3. Misc. line reductions | \$10,178 |
| 4. District payroll contracted Service reduced | \$7,000 |
| 5. Rental equipment reduction | \$2,000 |

Increases occurred in:

- Salaries and benefits for existing Central office staff

The overall savings for System Administration is \$51,098

100% EPS Allocation 2008-2009	2008-2009 Budget	EPS Status
\$ 265,200	\$ 257,200	Below by \$ 8,000

Transportation

2007-2008 Budget	2008-2009 budget	Projected Increase	Percent of Increase
\$ 519,160.	\$ 547,222	\$ 28,062.	5.4%

Substantial Reductions are:

1. Sub Drivers budget reduced	\$ 4,000
2. Repair budget reduced	\$ 6,000
3. Insurance budget reduced	\$ 5,000
4. Supplies reduced by	<u>\$ 8,000</u>
Total reduced	\$ 23,000

Increases occurred in:

1. Salaries, fuel, Maine state retirement, telephone, and utilities. Fuel alone represented a \$ 40,000.00 increase.

Overall increases in Transportation were \$ 28,062.

100% EPS Allocation 2008-2009	2008-2009 Budget	EPS Status
\$ 468,867	\$ 547,222	Above EPS by \$ 78,355

The transportation cost center budget for 2008-2009 is \$ 547,222, which is above the EPS target. As with every other school unit this year, the major cost issue was the significant increase in fuel costs projected when the budget was developed. In 2007-2008, fuel was budgeted at \$2.50 per gallon, while in 2008-2009; the budget figure was \$4.00 gallon. This one item accounted for virtually the entire budget increase this year. However, because fuel costs have moderated, we expect to end the year closer to the EPS-recommended level (similar to 2007-2008, when MSAD #29 was only \$22,152 over the EPS level).

MSAD #29 maintains an aggressive schedule of bus maintenance and replacement to ensure that our bus fleet is as efficient as possible. We collaborate with area school units on fuel bids. We are currently awaiting bus routing software from the State, which will help us analyze and manage bus routes in the most cost-effective way possible. In addition, we are exploring the possibility of creating a Southern Aroostook bus maintenance facility similar to the one in Presque Isle to reduce repair services on a regional / collaborative basis.

Special Education

2007-2008 Budget	2008-2009 budget	Projected savings	Percent of decrease
\$ 1,603,656	\$ 1,595,322	\$ 8,334.	.5%

Substantial Reductions are:

- | | |
|-----------------------------------------------------------------------------------------------------------------------------------|------------------------|
| 1. Eliminated an Elementary Special education teacher and adjusted secondary salary line to reflect teacher attrition etc. | \$ 60,000 |
| 2. Reduced Consultant use as well as Contracted services. | \$ 43,000 |
| 3. Reduced Prof. Development, supplies, and Teacher tuition | <u>\$ 5,000</u> |
| Total Savings | \$ 108,000 |

Increases occurred in:

1. Salaries and benefits for existing staff.
2. Developmental Therapy staffing, travel and substitutes.

Overall Savings in Special Education is \$ 8, 334.

100% EPS Allocation 2008-2009	2008-2009 Budget	EPS Status
\$ 1,152,861	\$ 1,595,322	Above EPS by \$ 442,461

MSAD #29 has worked hard to achieve efficiencies in its special education programs while maintaining the high quality programs of these legally mandated services. Overall, the 2008-2009 budget for the special education cost center is \$1,595,322, which is actually \$8,334 less than the 2007-2008 Budget. We were able to eliminate an elementary special education teacher because our successful Literacy First initiative has reduced special education referrals. MSAD #29 will continue to explore ways to reduce special education costs, including the possibility of regional collaboration for special education services.

Facilities and Maintenance

2007-2008 Budget	2008-2009 budget	Projected increase	Percent of increase
\$ 1196616	\$ 1,346,666	\$ 150,050	12%

Substantial Reductions are:

1. Minor capital improvement	\$ 2000
2. Property insurance	\$ 2,750
3. Contracted Services	<u>\$ 2,000</u>

Total Savings \$ 6,750

Increases occurred in:

- 1. Salaries and benefits for existing staff.**
- 2. Fuel, utilities, substitute & spares.**

Overall increases in Facilities and maintenance was \$150,050... without the fuel increases MSAD # 29 would be below EPS in this cost center.

100% EPS Allocation 2008-2009	2008-2009 Budget	EPS Status
\$ 1,281,765	\$ 1,346,666	Above EPS by \$ 64,901

MSAD #29's budget for facilities and maintenance for 2008-2009 is \$1,346,666, an increase of \$150,000 over the previous year. Virtually all of the increase was due to projected costs for fuel and electricity. As with transportation costs, we are hopeful that we may realize some savings at the end of the budget year since prices have moderated.

Over the past nine years, MSAD #29 has invested over \$6,000,000 in renovations and systems replacements in our school buildings via a \$ 350,000 annual project budget line and a 2007 Renovation bond of 2.5 million. At Houlton High School, which houses grades 7 through 12, a conversion from steam to a hot water heating system, and electrical, plumbing, window, door and ventilation system replacements will be completed by October 2009. A complete lighting and window replacement has been done at Houlton Elementary School. We are projecting an annual average annual savings of 15,000 gallons or more of heating fuel as a result of these system upgrades. We have also engaged McCormick Facilities Management Consultants to maintain our facilities database to improve and increase the effective use of our facilities.

Currently, MSAD #29 is also exploring with the Town of Houlton the feasibility of using wood-chip boiler technologies to decrease our dependence on volatile

carbon-based fuels and invest in renewable local energy sources.

3. Comprehensive Educational Programs and Strong Student Achievement

MSAD #29 provides a comprehensive educational program for students from pre-kindergarten through grade 12. Unlike many school units, MSAD #29 has maintained programs such as industrial arts and life skills, as well as an alternative education program, to ensure that the needs of all students are met. MSAD #29's schools consistently make AYP and students perform well on state-wide testing compared to other school units in the region.

4. Collaborative Efforts

a. Collaborations with Town of Houlton

MSAD #29 has a long history of collaborating with the Town of Houlton, sharing facilities and services where possible. For example:

- MSAD #29's transportation office is located in the Houlton municipal garage and two bays are used to garage the special education bus and perform bus repairs.
- MSAD #29 utilizes several of the Town's athletic fields and shares in their upkeep.
- The Town utilizes MSAD #29's buses for transportation to municipal events.
- School facilities are used for a wide variety of municipal and community activities.
- As noted previously, there is currently a major public-private partnership underway to renovate and expand the arts center at Houlton High School for both student and community use.
- Also noted previously, the Town and MSAD #29 are currently researching wood chip boiler technologies.

b. Collaborations with Other School Units

MSAD #29 is a member of Vocational Region #2 (together with its former consolidation partners, MSAD #25, MSAD #70, CSD #9). Long before the reorganization law was passed, these school units recognized the importance of trying to work together to provide high quality education for the region's students at a lower cost. The school units applied for and received a grant under Maine's "Fund for the Efficient Delivery of Educational Services" in 2006. Mary Jane McCalmon served as a consultant for this project, which began work in February 2007. When the school reorganization law was enacted later in 2007, the

group's work shifted to preparing for possible consolidation of the school units and their report was included as part of the Reorganization Plan they submitted in August 2008. Although the Reorganization Plan was defeated by the voters, these school units have continued to discuss ways to collaborate as outlined in the Region 2 Collaborative Initiative Final Report. A copy of the Report is attached as Appendix A.

C. After Performing Due Diligence, MSAD #29 Was Unable to Consolidate with Other School Units

The consolidation law further provides that a school administrative unit may stand alone if, after performing due diligence to develop a plan for over 2,500 students, a school administrative unit is unable to achieve the enrollment goal due to the decisions of geographically proximate school administrative units.

MSAD #29 demonstrated due diligence and good faith in carrying out their obligations under the school reorganization law to consolidate with other school units in the geographic area.

The Reorganization Plan submitted by MSAD #29, MSAD #70, MSAD #25, MSAD #14, CSD #9, Bancroft, Hersey, Moro Plantation and Orient was voted down in all of the participating school units on November 4, 2008, voters in all of the participating school units voted down the Plan. (Subsequently, MSAD #29's former consolidation partners submitted a plan to create an Alternative Organizational Structure which was also rejected by the voters on January 27, 2009).

The only other school unit that is geographically contiguous with MSAD #29, Bridgewater, was part of a reorganization plan submitted with Easton, MSAD #42 and MSAD #45. The plan was rejected by voters in all of the participating school units on January 27, 2009. Furthermore, Bridgewater has contracted with MSAD #1 to provide a wide range of non-instructional services, which effectively removes it as a viable consolidation partner for MSAD #29.

D. Conclusion

MSAD #29 qualifies for an Alternative Plan because circumstances justify an exception to the 2,500 student minimum and its continuation as a school administrative unit is consistent with the purposes and goals of the reorganization law. MSAD #29 provides a quality education program while managing costs effectively; the student population is stable; and the schools receive consistent taxpayer support and thus are sustainable. MSAD #29 has and will continue to aggressively pursue management methods and collaborations to deliver quality

education programs at a reasonable cost.

We would be pleased to answer any questions or to submit any further documentation that would be useful in approving this Alternative Plan.

Appendix A

**REGION TWO
COLLABOATIVE INITIATIVE**

FINAL REPORT
February, 2008

SAD 14, EAST GRAND - Bill Dobbins
SAD 25, Katahdin - John Doe
SAD 29, Houlton - Steve Fitzpatrick
SAD 70, Hodgdon - Bob McDaniels
CSAD 9, Southern Aroostook community School - Terry Comeau
Region Two School of Applied Technology - Mike Howard

Consultant, Mary Jane McCalmon

MEETING OUTCOMES

Build connections among districts' administrative staff

Common understanding of 'collaborative initiative' work to date

Plans for further investigation of high priority areas of focus

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INTRODUCTION/PURPOSE

"The Fund for the Efficient Delivery of Educational Services" was established by Maine Public Law 2005. Its purpose was to provide funding to school administrative units to support planning to achieve significant and sustainable savings in the cost of delivering educational services and improved student achievement. Among the possible results expected were:

- Collaboration in the performance of administrative functions
- Collaboration in the delivery of educational services
- Enhanced regional delivery of educational services or support
- Broad based purchasing alliances

The Superintendents of six school districts -

- SAD 14, East Grand - Bill Dobbins
- SAD 25, Katahdin - John Doe
- SAD 29, Houlton - Steve Fitzpatrick
- SAD 70, Hodgdon - Bob McDaniel
- CSAD 9, Southern Aroostook Community School - Terry Comeau
- Region Two School of Applied Technology- Mike Howard, Director

successfully applied for a grant under this fund.

Their goals were to efficiently manage district costs while providing a high quality education for all students in the districts. They recognized

that as the communities change, it is becoming more difficult to sustain the expenditures necessary to provide each of the students the level of education they deserve. So they concluded that it is essential to take action before the public does so by voting against the needed funding. Region Two school of Applied Technology , proactive in working regionally prior to the consolidation law, brought the schools together to collaborate in this initiative.

The leaders wanted to increase both efficiency and effectiveness in their respective organizations by working together collaboratively. The group has worked for over a year with consultant Mary Jane McCalmon to do the collaborative planning.

This document is intended to report on the work done to identify and develop the plan to implement both the savings and the educational program enhancements.

APPROACH TO THE WORK

The report breaks the work into five phases. The first phase involved getting organized to proceed. The Steering Committee worked with the consultant on getting clear about what the work should look like, developing an agreed upon detailed work plan. The group also worked out the respective roles of the members of the Steering Committee and the consultant.

The second phase of the work focused on gathering data from staff

members and the community about possible areas to investigate to save money, or improve service or performance.

The third phase focused on analyzing the data from the stakeholders and prioritizing the identified opportunities to gain efficiencies or improvements.

The fourth phase shifted to engaging role-alike staff groups in doing the planning needed to achieve the efficiencies & improvements. Lastly, the fifth phase focused on how all of the work served to support the possible future consolidation of the five school districts. The State Legislature enacted a new School Administration Reorganization law in June 2007, requiring all school districts in the State with less than 2500 students to consolidate with other districts and reorganize administrative functions. At that point the substantial work done by the Steering Committee and staff began to transition to getting ready for possible consolidation of the five school districts.

PHASE ONE: GETTING ORGANIZED

The first order of business was to organize a Steering Committee to guide the process and be accountable for the desired outcomes. The Steering Committee was made up of the Superintendents of the five school districts, and the Region 2 School of Applied Technology Director (listed on page 2). The group defined the major steps in the process, created a detailed work plan, and established a time line for completion

of those tasks. They agreed upon some criteria they would use to evaluate the identified efficiencies. See exhibit 1 below:

CRITERIA:	Exhibit 1
1. Creates an efficiency in the use of our resources (saves money or reallocates \$ to teaching and learning.	
2. Improves the quality of education for our students.	
3. Is supportable by staff and community.	
4. Have the capacity to effectively plan for this change.	

The general structure of the work included seeking broad stakeholder engagement in identifying possible areas to investigate for efficiencies, evaluation of those possibilities using the above criteria, prioritization of ideas to narrow down the field of efficiencies to further investigate, and action planning around those strategies that rose to the top.

The Steering Committee met at least monthly, starting in February 2007 for oversight purposes. Additionally, members of the committee spent significant amounts of time in all steps in the process. Their physical presence was important because it sent a message that this work was important, and that they were committed to it.

PHASE TWO: DATA GATHERING

The data gathering phase opened up the process to invite the thinking of staff, students, parents and community. The goals of that stakeholder input were to garner as many good ideas as possible from various perspectives, to build local ownership for the collaboration among the school systems, and to maintain quality education without increasing the

burden on tax payers.

A series of focus groups were conducted by the consultant and members of the Steering Committee. A total of 17 different groups, including staff, parents and community members were interviewed, each for about an hour, producing a rich data bank. See Appendix 1 at the end of the report for a complete list of stakeholder groups that participated.

Each group was asked a standard series of questions aimed at surfacing desired outcomes, good ideas, and barriers or worries about the work.

See Exhibit 2 below:

FOCUS GROUP QUESTIONS

What are the 2-3 most important outcomes you would like to see from this work?

What are the areas we should examine for collaboration, consolidation, or resource sharing among our school districts that would save money and/or improve service, or performance?

Are there areas you feel strongly should not be subject to collaboration, consolidation or resource sharing?

What are the barriers you believe the districts will encounter in trying to implement any regionalization of district functions/

Any advice you would like to give us as we embark on this work?

The focus groups were conducted during February and March of 2007. Universally people appreciated being asked for their ideas, and the meetings were all productive and positive.

PHASE THREE: DATA ANALYSIS

All of the ideas produced in the data gathering stage were documented, and organized by theme for analysis by the Steering Committee. The

data fell into the following categories: (for complete list of ideas by category see Appendix 2 at the end of the document)

- Teaching and Learning
- Professional Development
- Technology
- Special Education
- Shared Staff
- Transportation
- Purchasing
- Food service
- District Administration

During the month of April the Steering Committee analyzed the data using the previously agreed upon criteria, resulting in an identification of high priority ideas to be pursued. See Appendix 3 for the list of the prioritized ideas.

The Steering Committee agreed that we needed to set up a series of small group meetings of staff who could pursue the investigation of the priorities, and to plan for possible implementation of those strategies. A plan was developed that defined the staff group meeting structure and a schedule for those meetings.

PHASE FOUR: FOCUSED EFFICIENCY PLANNING

During the months of May and June a series of meetings were held

involving staff groups from all of the participating systems to pursue the work identified as having potential for savings, and/or improved organizational performance. The working groups identified to carry out that next phase of the work were:

- Food Service Coordinators
- Technology Directors
- Transportation Leaders
- Special Education Directors
- Professional Development Coordinators
- Curriculum leaders
- Building & Grounds Leaders
- Athletics Directors
- District Office (Superintendents)

In addition to these working groups, all of the administrative teams from the five districts and the Region 2 Director met in June to stay informed about the work and to do some planning to support the working groups.

See Appendix 4 for agenda/results. Each of the groups identified viable changes that would gain efficiencies and/or improve performance in some way.

The food service directors, for instance, agreed to plan and implement development of a common menu, with the first step of actually implementing common menu items 60% of the time as a trial for this year. They also worked on common purchasing, made easier with the

common menu. Additionally they are working together to plan and implement professional development for their staff, resulting in more efficiency and higher levels of performance. For a more comprehensive look at group meetings and their agendas see Appendix 5 at the end of the document.

PHASE FIVE: TRANSITIONING TO CONSOLIDATION

In June 2007 the Governor and the State Legislature passed new legislation requiring school districts under 2500 student population to consolidate. As a result of that legislation the five school districts involved in the grant sent a letter of intent to the Commissioner of Education to form a Regionalization Planning Committee to enter into negotiations to consolidate the respective districts. The RPC began meeting in early September 2007.

In the face of that consolidation possibility the working groups met again in October - November 2007 and began to talk about how each of the respective functions (transportation, maintenance, etc.) would be organized in a consolidated school district, with an eye toward continuing to find efficiencies, and performance enhancements.

Every one of the groups has focused on a short list of items they believe will result in more efficient, effective operation of their functions, and they are continuing to plan for implementation of changes. The intention

is to pursue these strategies in either a collaborative relationship, or in a consolidated structure. A list of the specific items each group is working on can be found in Appendix 6 at the end of this report.

A series of working group meetings is already scheduled for March 2008 to continue this important work.

**REGION 2 COLLABORATIVE INITIATIVE
PHASE ONE WORK PLAN**

APPENDIX 1

ORIENTATION/DATA GATHERING SESSIONS		
GROUP	TYPE OF MEETING	WHEN
Superintendents	-Individual Interviews	Feb 6, & 7 TBD
School board members	-Focus group by district starting w/Region 2	TBD (60-90 min)
Town Officials	-Focus group by district	Early March (60 min)
Finance managers	-Focus group via ATM	Feb 8 or 9 (60 min)
Transportation managers	-Focus group via ATM	Feb 8 or 9 "
Food service managers	-Focus group via ATM	Feb 8 or 9 "
Bldg/grounds managers	-Focus group via ATM	Feb 8 or 9 "
Technology leaders	-Focus group via ATM	Feb 8 or 9 "
Spec. Ed. Leaders	-Focus group via ATM	Feb 8 or 9 "
Curriculum Leaders	-Focus group via ATM	Feb 8 or 9 "
Principals	-Focus group via ATM	Feb 8 or 9 "
Representative group of elementary teachers incl ed techs, guidance, nurse	-Focus group via ATM	Feb 8 or 9 (60 min)
Rep group of middle, high school, Region 2 teachers, incl ed techs, guidance, nurse	-Focus group via ATM	Feb 8 or 9 (60 min)
Rep group support staff Secretaries, custodians	-Focus group via ATM	Feb 8 or 9 (60 min)
Business community	-Rotary, Chamber meetings w/focus grp format	TBD (60 min)
Rep group of High School Students	-Focus group via ATM	TBD (60 min)
Parents	-Title One parent mtgs w/focus grp format	TBD (60 min)

FOCUS GROUP THEMES

APPENDIX 2

TEACHING & LEARNING:

1. Common curriculum
2. Common schedule (year/day)
3. Increased academic choices for learners
4. Extended day programming for kids
5. More courses re. Businesses in area ex. auto/metal working
6. Share curriculum expectations
7. Three of five use NWEA - maybe all
8. High quality regional summer school
9. Share teams in sports - ex. golf (not major sports)
10. Give up Harvest Break

PROFESSIONAL DEVELOPMENT

1. Regional professional development needed - high quality
2. Quality long term planning done together
3. Share expertise of our staff in operations, technology & teaching
4. Support for adoption of new practices
5. Grade level meetings needed across district
6. Support new teachers
7. OSHA/other training for operations staff, food service, etc. -do together regionally
8. Develop expertise in 'green operations', energy related areas
9. Share all P/D resources - videos, etc.
10. Plan common professional development days
11. CSR \$ gone - plan our own learning groups
12. More P/D days needed for C/A/I planning together
13. Use ATM for staff development

TECHNOLOGY

1. Common purchasing - hardware, software
2. Joint training
3. Common long term planning
4. Use for educators & operations staff
5. Use ATM more for classes, esp. high level ones

6. Create Tech Integrator position for all 5 districts - work with teachers
7. Support ATM use through professional development & incentives
8. Create email network among all staff
9. Use same administrative software - ADS - multi user license
10. Develop virtual private networking
11. Directors need to meet regularly
12. Pioneer Wireless great resource
13. Create list serve for all of us to use
14. One Student Info System
15. Use ATM to share expertise of OUR staff - they can help lower achieving learners
16. One wide area network: one person in charge - reduce # of servers etc

SPECIAL EDUCATION

1. Need a Spec Ed Director for all districts w/Masters degree to manage the tougher PET's.
2. Share Sp Ed programs/services, ex. speech, OT
3. Collaborate/share transportation for job placements
4. One Sp Ed Director/21st Century Program Director
5. Share expensive equipment - ex. vision screening

SHARED STAFF

1. Psychologist
2. Grant writer
3. Nurse w/C.N.A. staff under her direction
4. Elementary guidance
5. Need art, music, chorus, drama, GT - pool \$ to get these
6. Athletic Director
7. One Adult Ed program using different sites
8. One sub pool
9. Coordinate library services/staff

HIGH PRIORITY AREAS FOR INVESTIGATION

APPENDIX 3

PROFESSIONAL DEVELOPMENT

1. Regional professional development for all staff *
- > Grade level clusters meetings
- > Common professional development days
 - Create a structure to do the planning for those days
2. OSHA training for operations staff regionally
3. Share staff expertise - use those people
4. Use ATM as a means of sharing staff
5. Add professional development time/days

TECHNOLOGY

1. Use ATM for more classes, ex. math lab *
2. Map what we have now, and how it is used, hardware, software, expertise *
3. Common purchasing of hardware and software
4. Technology Directors meet regularly
5. Create email network among regional staff
6. One common Student Information System

SPECIAL EDUCATION

1. One Special Education Director for the five districts *
2. Standardize procedures/ reports/ protocols for special education work (Maine State Billing CASE) *
3. Shared services/programs

TRANSPORTATION

1. Monthly director meetings
2. One regular coordinator for all districts
3. Centralized repair facility, with spare parts storage, etc. *
4. Investigating the privatization of transportation *
5. A common radio frequency

PURCHASING

1. Copiers/printers *
2. School supplies *
3. Mechanical services contracts
4. Lawn care services (Not mowing)
5. Food

FOOD SERVICE

1. Common menu w/ leaner, healthier food & common purchasing *
2. Regular Director meetings

GENERAL ADMINISTRATION

1. Investigate feasibility of one central office. *

CURRICULUM ASSESSMENT INSTRUCTION

1. Common curriculum *
2. NWEA for all districts *
3. Common schedules for school day *
4. Quality summer program
5. Extended day programming
6. Lengthen ed school day to create more student learning time, and make better use of existing school day time

(*Blue denotes highest priority within each category)

**SOUTHERN AROOSTOOK COUNTY
ADMINISTRATIVE TEAMS MEETING
June 21, 2007**

AGENDA

Welcome - purpose

Check in

Intros

A wish for this collaborative work

Review of high priority areas for Investigation

Informal dialog for understanding

Status report on each area to update the group

**Discussion of changes/additions based on State DoE action on
school district consolidation**

Analysis of areas of focus for Administrative Teams

- Professional Development
- Special Education Director
- Common Curriculum/ calendar
- ATM use
- Accessibility of Advanced classes

What is the work?

**Develop/share data about current reality & future
possibilities for each arena (whole group)**

How does the work proceed?

**Drafting a plan for what the work would look like, including
goals/action steps. (Individuals choose an area to work on)**

Is there agreement on the draft plan of action?

**Subgroups report out their first draft and get feedback
from group, and edit their draft based on that feedback.**

Next steps/close

COLLABORATIVE INITIATIVE
PROGRESS REVIEW: February 2008 **APPENDIX 6**

1. **Building/Grounds**
 - a. Energy strategies
 - b. Management of building renovation/maintenance
 - c. Common management of training
 - d. Staffing management
 - e. Supplies management

2. **District Office Staff**
 - a. Common purchasing
 - b. Common technology system
 - c. Common training
 - d. Share payables
 - e. Identify "start up" tasks for new RSU

3. **Food Service**
 - a. Common menus - maintain, advance
 - b. Purchasing bid
 - c. Professional development
 - i. Nutra-Kids, Serve-Safety, Hazard analysis
 - d. Moving toward consolidation
 - i. One director with team leaders
 - ii. Build opportunities to provide food for other groups
(ex. Meals on Wheels - revenue)

4. **Professional Development**
 - a. Common professional development planning/implementation
 - i. March 08
 - ii. Common PLC implementation support
 - b. Establishment of a Professional Development Leadership Team for Region 2 - next steps

5. Curriculum Development

- a. Compare current ELA, Math Science curricula
- b. Compare current programs of study, requirements to graduate
- c. Curriculum Leadership Council

6. Special Education

- a. Moving toward consolidation
 - i. IEP Management
 - ii. State Reporting
 - iii. Professional Development
 - iv. Personnel management (internal, external)

7. Technology

- a. Planning for how things will be done w/consolidation
 - i. Budgetting
 - ii. Equipment maintenance
 - iii. Inventory

8. Transportation

- a. Planning for new RSU
 - i. Hiring
 - ii. State Reports
 - iii. Training
 - iv. Route planning, management - State software
 - v. Fuel
 - vi. Repairs

9. System Administration

- a. Moved to RPC subcommittee

BUILDING/GROUNDS

1. ENERGY EFFICIENCY

- Look at alternative fuels to put in the energy mix
- Timer for heat, with night set back
- Look at getting additional oil tank
- Increase capacity to store fuel
- Buy when price is low
- Explore feasibility of doing an energy audit
- Look at a "green" school, ex. East End Elementary - Portland
- Mechanical services: determine which company to go with; Honeywell or Mechanical Services

2. BUILDING RENOVATION MANAGEMENT

- Determine building renovation needs, including energy elements
- Identify internal people who have skills to do specialized work, ex. window replacement, shingle/siding replacement etc.
- Consolidate bid on roofing contracts
- Common contract for boiler maintenance & sprinkler/fire alarms
- Investigate to see if plowing/mowing in-house is less expensive

3. TRAINING

- Plan for bulbs disposal, some no longer contract w/Chem Safe
- Coordinated planning for training of new employees
- Management system needed for all required trainings - master list of requirements & status of each staff member's participation
- Coordinate yearly calendar of training

4. MANAGEMENT OF STAFFING

- Director manages hiring
- Identify who has what areas of expertise among staff so internal responsibilities can be assigned wisely
- Designate a "Chemical Hygiene Officer"

5. MANAGEMENT OF SUPPLIES

- Identify supplies items that are the same and different; agree on what should be purchased in common in future
- Develop a site for centralized storage for bulk purchases
- Bring a Building/Grounds person in who has experience in a larger system, ex. Dave Marshall, SAD 17

6. CONSOLIDATION

- Fear no savings there
- Fear contracting out will happen
- Fear loss of efficiency
- Fear our hands will be tied - bureaucracy
- Want to make sure that productivity of staff is high - real way to save money
- Can we do an efficiency audit - to determine best way to assign roles/responsibilities?

GENERAL ADMINISTRATION

- 1. One central office**
- 2. One payables staff, payroll staff/service**
- 3. One superintendent**
- 4. One employee contract for all 5 districts for teachers etc.**
- 5. Centralize paperwork for building/grounds**

FOOD SERVICE

- 1. Common menu**
- 2. Monthly director meetings**
- 3. Leaner, healthier menu planning**
- 4. Include Ashland director in common planning**

FOOD SERVICE

1. COMMON MENUS

- The first experiment in using a common menu went well in September 2007 - 3 days a week. The kids are trying some new things. Next attempt in December. (Meet 11/7/07 via ATM to plan for December)

2. COMMON PURCHASING

- Coordinators submitted information to Bill D
- Bill contacted vendors; more detailed info was needed to do the bid
- More specific description of items, ex. weight of forks, etc. needed
- Bill will put together bid once this additional info is complete

3. PROFESSIONAL DEVELOPMENT: Nutra-Kids

- State people did not come to P/D because systems are not on the same plan
- Agreed to bring Walter Beasley for training
- Sysco might do "Serve Safety" training for all systems' staff together for free
- Training on "hazard analysis" together

4. VISION FOR FOOD SERVICE MANAGEMENT IN RSU 2

- Over-all Director needed
- Team leaders needed at each site or group of sites
- Full kitchens needed
- With centralized management, we could build opportunities to provide food for others; ex. Meals on Wheels
-

PROFESSIONAL DEVELOPMENT

1. PROFESSIONAL DEVELOPMENT NEEDS

- Survey: some did it, some didn't do it, so data incomplete
- March 2008 P/D Day
 - Houlton DLT has started a plan for March 08
 - Have constructed a list of offerings
 - Dawn will email that list to superintendents, principals, curriculum leaders, teachers, ed techs
 - Recipients are invited to add to the list and return it to Dawn before Thanksgiving (November 13, 2007)
 - Curriculum Leaders will review the list on November 13 (1:00-3:00) and will prepare for inviting speakers, logistics, sites, etc.

2. PROFESSIONAL LEARNING COMMUNITIES

- Systems have different forms of it
- Agreed PLC's offer a regular opportunity to focus on teacher practice. Should be specific to content area, held at least quarterly, have a well designed format, & be K-8, or 9-12
- Offer session on Friday March PD Day
- Possible areas for learning:
 - Integration of technology - use of Apples
 - NWEA
 - Chapter 127 discussion
- Possible funding sources
 - Title IIA
 - Rural \$
 - Echo 2000 \$

3. PROFESSIONAL DEVELOPMENT LEADERSHIP TEAM

- Agreed it is important to create this team
- For efficiency, fold PDLT into Curriculum planning group
- Plan for detailed level discussion of it after March P/D day
When we will be clearer about collaboration vs. consolidation, about graduation requirements & the Special Ed changes

TRANSPORTATION

1. More runs between buildings to increase opps for students to participate in classes
2. Eliminate second run for late students
3. Monthly manager meetings
4. Coordinate trips to same destination
5. Central repair facility & store spare parts
6. Share 'spare' drivers
7. Develop shared preventive maintenance program
8. Consolidate some runs (Topsfield)
9. Piggy back after school runs
10. Common radio frequency needed (Homeland Security Grant?)
11. "Lend" emergency parts to one another as needed
12. Privatize transportation function

PURCHASING

1. Science equipment
2. Technology - hardware & software
3. All supplies - education & operations
4. Fuel bids
5. spare parts for busses & tires
6. Food
7. Mechanical services contract
8. Centralize building/grounds contracts
9. division of labor - develop expertise among staff & share
10. Copiers, printers
11. Sp Ed contracts
12. Common contract for insurances - busses, property etc.

CURRICULUM DEVELOPMENT

1. ELA, Math, Science

- Get clear about what we are all doing in ELA, Math, Science, including labs (Given new HS graduation requirements coming, we need to plan together to get to the same end)

2. Alignment of current programs

- Get clear about our current programs of study, requirements to graduate
 - i. course descriptions/syllabi, goals, objectives, etc.
 - ii. Inventory currently used texts, materials, etc.

3. Leadership of Curriculum

- Curriculum Leadership Council needed to lead and support ongoing collaboration

SPECIAL EDUCATION

WHAT WILL MANAGEMENT OF SPECIAL ED LOOK LIKE IN RSU # 2?

1. IEP's

➤ Director:

- Will be present at high need/high cost risk meetings
- Will be responsible for overseeing compliance, assuring that IEP's are run where/how they need to be
- Put people/processes in place to assure compliance
- Assure accountability for compliance

➤ Building Coordinators:

- System of building or cluster of buildings coordination of PET's, and IEP's

➤ Student Files

- Maintained @ students' building
- Inactive files maintained at District office

2. STATE REPORTS

- #### ➤ Director responsible for all completion of State/Federal reports: seeks input from staff

3. PROFESSIONAL DEVELOPMENT

➤ Director:

- Stays current on reuls/regulation from State & Federal Govts.
- Organizes professional development for staff to assure best practice regarding paperwork and classroom practice'
- Orientation and induction of new staff
- Oversee required trainings, ex. Ed Techs
- Oversee proper qualification, certification
- Maintains a system of consistent communication with all Special Ed staff

4. Personnel (internal), Contracted Services (external)

➤ **Principal:**

-Makes recommendations on hiring Special Ed teachers to Supt

➤ **Director:**

-Involved in hiring committee

-Recruit contracted services staff and oversee performance

-Look into hiring vs. contracted services

-Involved in evaluation of new special education teachers and contracted services personnel when needed

5. Budget

6. Policy

7. Outside Agencies

8. Program establishment/implementation/evaluation

9. Student evaluation

TECHNOLOGY

WHAT WILL MANAGEMENT OF TECNOLOGY LOOK LIKE IN RSU #2?

1. BUDGETTING

- A replacement cycle for technology will be determined by Technology Director.
- Have an E rate consultant
- Budget for software
- Budget for storage of equipment
- Staffing needs:
 - One Technology Director
 - Tech support person (hardware/software person)
 - Network manager
 - Tech Integration for all schools prorated based on student population
 - Approximately 7 FTE

2. EQUIPMENT MAINTENANCE

- Managed by the Director
- Some services subcontracted
- Some done by Tech support staff
- Part time student provides some service

3. CONDUCT AN INVENTORY

- Fields to be included:
 - Item
 - Expiration date
 - Identification #
 - Minimum dollar value \$500?
 - Life expectancy
 - Date of purchase
 - Vendor
- Use EXCEL
- Go to existing insurer (insured value) - go with that? Determine Need to do inventory
- Find an inventory service on the web?
- Find out what other consolidating school systems are doing

TRANSPORTATION

WHAT WILL MANAGEMENT OF TRANSPORTATION LOOK LIKE IN THE NEW RSU 2?

1. *HIRING*

- Hiring of drivers done by new Director of Transportation
 - Interview & recommend to Superintendent, who hires (no board approval needed)
 - Subs hiring done solely by Director of Trans. (No supt involved)

2. *STATE REPORTS*

- Done by Director/secretary, signed by superintendent

3. *TRAINING/PHYSICALS/TESTING*

- All coordination done by new Director

4. *ROUTES*

- Planning of routes, assignment of drivers done by Director, in Consultation with Superintendent, esp. on "hot" issues

5. *BUS & FUEL STORAGE*

- Bidding done by Director
- Storage decentralized or credit cards with local stations

6. *BUS REPAIRS*

- Busses stored in decentralized way
- Minor repairs
 - Lights, heater motors, boosters
 - Alternators, batteries
- Rely on team leader/head bus driver in separate areas to do some of the urgent work, or dispatcher makes arrangements for repairs
- Five mechanics
 - 1 SACS, 1 Katahdin, 2 Houlton/Hodgdon, 1 Danforth

7. No Presque Isle contract, or very little

Current data: 60 busses
40 regular runs
2 Kindergarten runs
6 Pre K runs