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**Interim Report on Act 153: An Act Relating to  
Voluntary School District Merger, Virtual  
Merger, Supervisory Union Duties, and Including  
Secondary Students with Disabilities in Senior  
Year Activities and Ceremonies**

Interim Report to the Senate and House Committees  
on Education

**Submitted July 20, 2012**

**By**



*The University of Vermont*

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## **Report on Act 153: Voluntary School District Merger Activity and Process (CY11)**

### *Introduction*

Vermont's Act 153 stimulates voluntary mergers of school districts, specifies certain responsibilities for supervisory unions (SU), and addresses the inclusion of secondary students with disabilities in senior year activities and ceremonies. The Act (Sec. 8) calls on the University of Vermont's James M. Jeffords Center (Jeffords Center) to collaborate with the state Department of Education (SDE) and participating school districts to monitor and evaluate the voluntary merging of Vermont school districts.

Act 153 § 8 (c) On or before January 15, 2018, the James M. Jeffords Center and the department of education shall present a final report concerning the study required in subsection (b) of this section, including recommendations to the house and senate committees on education regarding what further actions, if any should be pursued to encourage or require merger by nonparticipating school districts, and shall provide interim reports in each January until that date.

This interim report describes known merger activities in 2011, and presents the results of an exit poll conducted on the day of the merger election in the Chittenden East Supervisory Union (June 7, 2011). A previous report concerning activities in CY 2010 was submitted to the legislature by the James M. Jeffords Center and the Vermont Department of Education<sup>1</sup>. Because the pace of merger activities has been slower than anticipated and limited funding availability, most of the research steps proposed earlier have been held in abeyance pending the outcome of new legislation expected in early 2012.

### **Research Activities Completed**

#### *Department of Education Records*

In the first year of implementation, a database of contacts with school administrators was compiled by staff from the Department of Education and the Vermont School Boards Association. These records have been maintained by Department staff and provide a listing of all supervisory unions known to be engaging in merger activities through December 2011. Three supervisory unions have had their articles approved by the State Board, all of which have been rejected by voters. As of December 31, 2011 there were at least 11 research studies underway or approved by vote, and seven more SUs are studying the creation of joint agreements. The reports summarized in the following table represent activities known to and reported by the SDE; other activities may have occurred that had not yet been recorded as of December 2011.

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<sup>1</sup> [http://www.uvm.edu/~jeffords/reports/pdfs/Voluntary\\_School\\_District\\_Merger.pdf](http://www.uvm.edu/~jeffords/reports/pdfs/Voluntary_School_District_Merger.pdf)

**Table 1. Status of Known Current Merger Activities as of December 2011**

<b>RED Articles Approved by State Board with Failed Community Votes</b> (3 SUs, and 13 Boards)	
Addison Northwest [4 bds.]	
Chittenden East [6 bds.]	
Franklin West [2 bds., Fairfax & Fletcher]	
<b>RED Committees not recommending a Merger Vote</b> (1 SU, 7 Boards)	
Chittenden South [7 bds.]	
<b>Local Boards Voted to Undertake 706/RED Study</b> (10 SUs and 58 Boards)	
Addison Central [8 bds.]	Orange Southwest [3 bds.]
Chittenden South [6 bds.]	Orleans Southwest [6 bds.]
Lamoille South [3 bds.]	Southwest VT, Arlington, Sandgate [8 bds.]
Windsor SW [5 bds.]	Windham Central [6 bds.]
Bennington-Rutland [9 bds.]	Franklin Central [4 bds.]
<b>Preliminary RED Research Under Way</b> (1 SUs and 5 Boards)	
Orange-Windsor [5 bds.]	
<b>SU Joint Agreements</b> (7 SUs)	
Chittenden Central, Franklin Central and Franklin West SUs: Combined provision of technology services.	
Windham County SUs: Transportation ( <b>under discussion</b> ).	
<b>SU Merger – Proposed</b> (2 SUs)	
Rutland Windsor and Windsor Southwest	
<b>Preliminary Research – SU Joint Agreements</b> (5 SUs)	
Blue Mountain/Orange East/Rivendell	
Windsor Northwest and Orange Windsor	

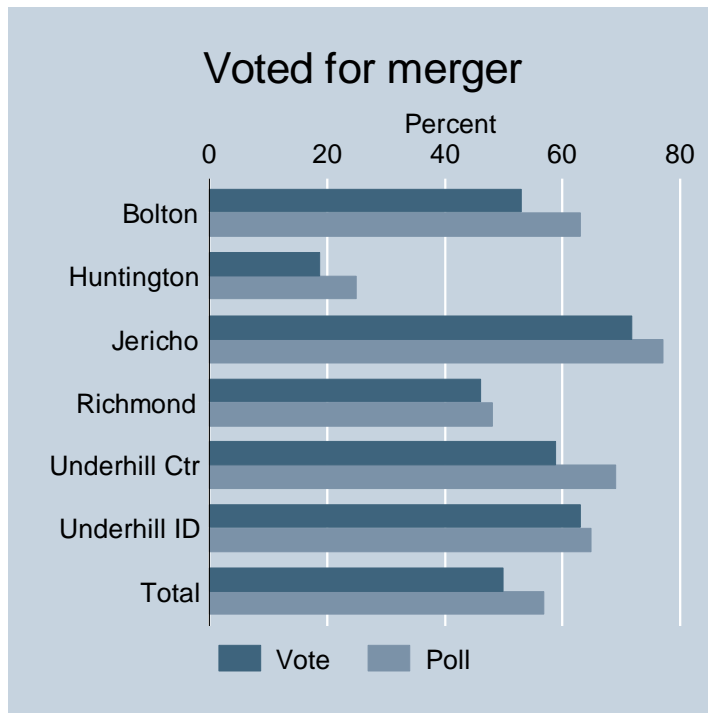
*Exit Poll of Voters*

In June 2011, an election was held for a proposed RED consisting of six school districts within the Chittenden East Supervisory Union. The RED proposal was defeated in two of the six school districts (Huntington and Richmond). Because Act 153 requires that a merger vote be approved by every participating school district, the proposal was not approved despite a narrow majority (50.7% of all votes) in favor of the proposal.

A representative study of voter reactions to the Chittenden East merger proposal was conducted in order to better understand the challenges faced by school districts pursuing voluntary mergers. On the day of the election (June 7, 2011), the Jeffords Center and the UVM Vermont Legislative Research Service (VLRS) conducted an exit poll of voters at all six polling places: Bolton, Huntington, Jericho, Richmond, Underhill Center, and the Underhill ID school. A total of 366 voters were interviewed, with a sampling error of less than  $\pm 5$  percentage points at 95% confidence. Detailed reports on the survey results are available at the websites of the Jeffords Center<sup>2</sup> and VLRS.<sup>3</sup>

The figure below shows the wide gap in approval between Huntington, where only 19% voted in favor of merger, and Jericho, where the measure was approved by 72%. The figure also shows that the poll results were fairly close to the actual vote, but the “no” votes were somewhat underrepresented by our study.

**Figure 1. Chittenden East voting results by community.**



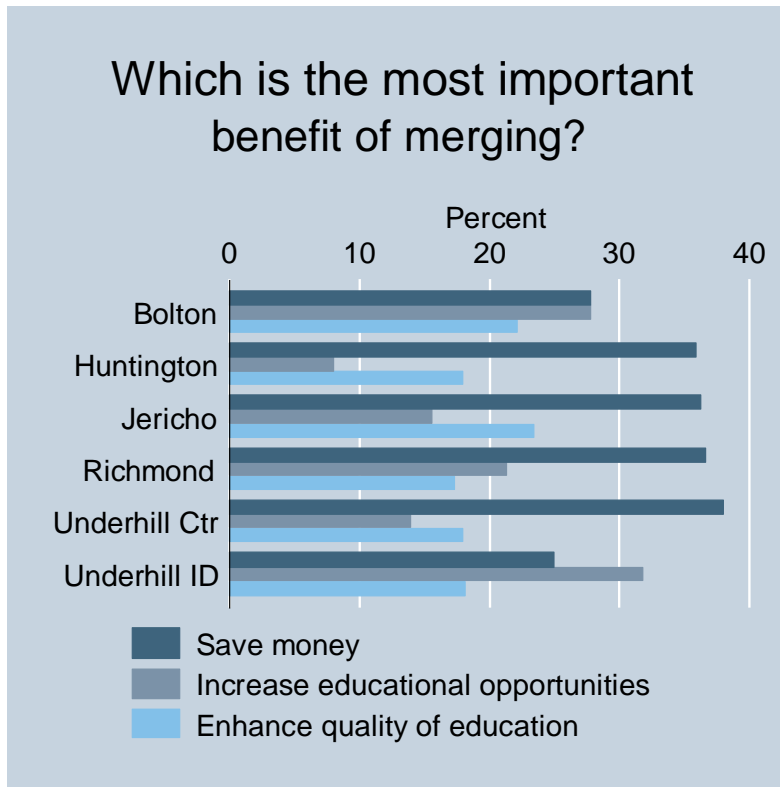
<sup>2</sup> [http://www.uvm.edu/~jeffords/reports/pdfs/school\\_merger.pdf](http://www.uvm.edu/~jeffords/reports/pdfs/school_merger.pdf)

<sup>3</sup> [http://www.uvm.edu/~vlrs/Education/Chittenden\\_East\\_RED\\_exit\\_poll.pdf](http://www.uvm.edu/~vlrs/Education/Chittenden_East_RED_exit_poll.pdf)

We analyzed the survey responses to assess the independent effects of factors measured by the survey on votes for the merger. Demographic factors such as age, education, and gender were *not* predictive of voting in favor of the merger proposal. The perceived risks and benefits of merging were the *only* statistically significant predictors of the vote. Not surprisingly, respondents who described merging in terms of risks were more likely to vote against the proposal, and those who indicated expected benefits were more likely to vote for the proposal.

Key difference across communities can be seen in the following chart, which shows the three most frequently selected benefits of merging.

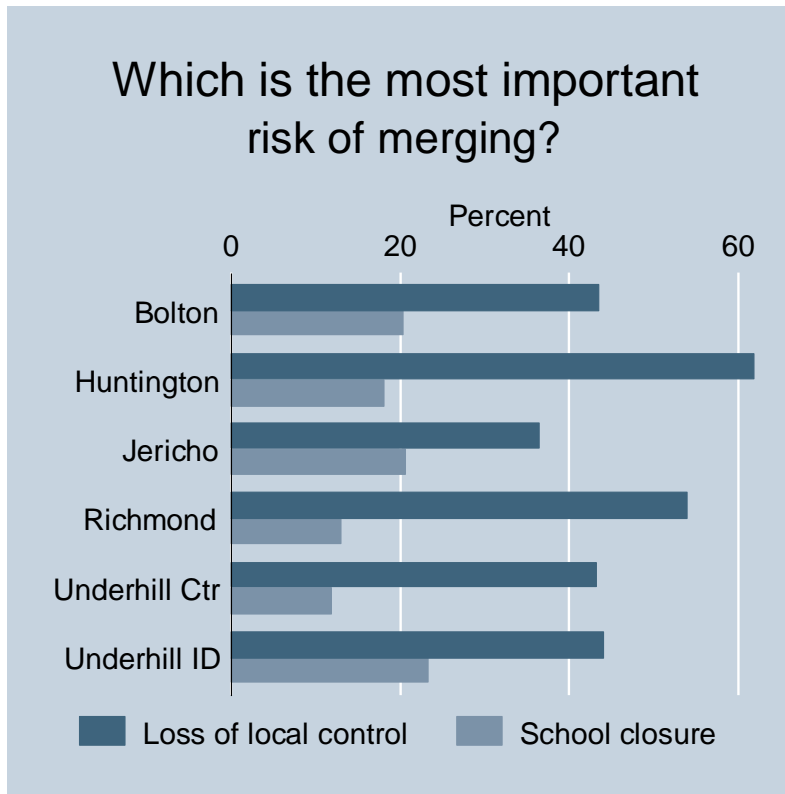
**Figure 2. Perceived benefits of merging.**



- The value of saving money was widely endorsed in all communities (33% of all respondents and 36% in Huntington).
- Perception that merging would enhance the quality of education was relatively evenly distributed (19% of all respondents and 18% in Huntington).
- Fewer than 10% of Huntington voters agreed that the most important benefit would be to increase educational opportunities (19% of all respondents).

Important variation can also be seen among the most frequently selected *risks* of merging, shown in the chart below.

**Figure 3. Perceived risks of merging.**



- Concerns about school closure were comparatively evenly distributed and moderate (17% of all respondents, and 18% in Huntington).
- Concerns about the loss of local control were widespread, and highest in Huntington and Richmond (47% of all respondents and 62% in Huntington).

In a memorandum to the State Board of Education (May 17, 2011)<sup>4</sup>, Department of Education staff presented a summary of challenges to implementation. The team wrote, “Efforts to build the consensus needed to form REDs sometimes appear to be in opposition to deeply held values of local control of schools. The significant role of municipalities in Vermont life seems integral in the minds of many to making Vermont what it is. Suburbanization and regionalization of other aspects of community life have made the school districts even more the center of community life.” While we cannot comment on the reasons for the centrality of school districts in their communities, these observations are borne out by the survey responses as well as the comments of more than a few Huntington voters to our interviewers on the day of the election. Another comment we heard frequently concerned discussions on the locally focused “Front Porch” internet forum<sup>5</sup>. Access to Front Porch is limited to residents of specific communities and neighborhoods. A substantial number of poll respondents told us that

<sup>4</sup> [http://education.vermont.gov/new/pdfdoc/board/packet\\_archives/2011/05-17/EDU-SBE\\_Item\\_H\\_Act\\_153\\_Implementation\\_May\\_17\\_2011.pdf](http://education.vermont.gov/new/pdfdoc/board/packet_archives/2011/05-17/EDU-SBE_Item_H_Act_153_Implementation_May_17_2011.pdf)

<sup>5</sup> <http://frontporchforum.com/>

the merger election was actively discussed on this forum by residents in Huntington and Richmond, and those opposed to the merger were said to have been particularly active.

The election results hold a number of lessons for future voluntary merger activities. Although each community will have its own variation on the themes of local control, the prospect of tax increases, and the broader implications for public finances, we believe there are some commonalities.

- Communities with strong attachment to their local school districts will not be easily convinced on financial grounds.
- When a local school and district represent the core of a community's identity, merger proposals will need to offer an alternative that is either more compelling, or one that preserves the values that local control of local schools represents to voters in communities such as Huntington.
- Successful merger proposals must address the unique concerns of every community subject to the merger. The best way to accomplish this is to conduct a survey with representative sampling of the entire electorate.

#### *Conclusion*

Implementation of voluntary mergers has proven to be problematic. In all three cases in which RED creation has been attempted, the propositions have been rejected by voters. The "virtual merger" provisions of the Act are likely to receive increasing scrutiny in the coming year, and new legislation is expected. Because of the lack of merger activity and the expectation of legislative change, the previously planned research design will need substantial modification in order to reflect the changing policy landscape, and the uncertainty of research funding availability.

As more RED proposals are developed in the coming year, it will be important to improve our understanding and measurement of what is meant by "educational opportunities" and public expectations for opportunities to learn that are afforded to Vermont students. How would Vermonters expect to scarce resources to be optimized in order to provide the best possible opportunities to learn, and obtain the best possible educational outcomes? An additional priority in the coming year will be the establishment of baseline measures so that the long term effectiveness of the Act can be evaluated. Finally, a better understanding of public opinion is needed concerning both local and statewide issues. We expect the 2012 review of research planning to include:

- Statewide survey of a representative sample of voters.
- A second survey of superintendents Additional exit polling at future elections.
- Focus group research as outlined in the CY2010 report.
- Continued stakeholder meetings.
- Tracking of ongoing merger initiatives and new legislation.