

DRAFT - Proposed Scope of Work

May 28, 2026

Regional Merger and Governance Study

St. Johnsbury School District and Caledonia Cooperative School District

Vermont's educational landscape continues to evolve as districts respond to changing legislative proposals, education finance discussions, demographic shifts, student needs, workforce challenges, and long-term operational considerations. While the participating districts each maintain unique strengths and opportunities, district leaders recognize the importance of proactively evaluating future governance and operational models to ensure continued educational quality, sustainability, equity, and strong community connections for students and families.

This study is intended to support thoughtful, data-informed planning by examining potential opportunities, challenges, and long-term implications associated with regional collaboration and possible governance restructuring.

Purpose of the Study

The purpose of this study is to conduct an independent and comprehensive analysis of the potential opportunities, challenges, educational impacts, governance implications, operational efficiencies, and taxpayer implications associated with a possible merger of the St. Johnsbury School District and the Caledonia Cooperative School District into a unified school district.

The study is intended to provide objective data and analysis to inform future local decision-making prior to any potential state-mandated governance restructuring under Act 73 and related legislative proposals, including the potential impacts of H.955 and future statewide education governance reforms.

The districts seek to proactively evaluate whether a merger would:

- Improve educational opportunities and programming for students
- Create operational efficiencies and long-term sustainability
- Strengthen educational equity and student supports
- Reduce duplication of services and administrative costs
- Impact local governance and community voice
- Affect the homestead and non-homestead tax rates within participating communities
- Position the districts for future state governance changes

The study is intended to provide factual information, financial modeling, and governance analysis to support informed local and regional decision-making. Completion of the study does not obligate either district to pursue merger or governance restructuring. The districts also believe that any future governance or operational decisions should remain grounded in improving student outcomes, expanding educational opportunities, supporting educational equity, and ensuring students continue to have access to high-quality programming and services. The districts further recognize that potential legislative action at the state level may require additional analyses, revisions to the scope of work, or engagement with future state-initiated and facilitator-led processes. Any such additional scope or engagement will be defined and quantified collaboratively at a later date, once greater clarity is available regarding legislative direction and state requirements.

Scope of Services

The consultant shall complete a comprehensive merger and governance study that includes, but is not limited to, the following components:

1. Governance and Legal Structure Analysis

- Review the current governance structures of both districts
 - Analyze governance options available under Vermont law, including:
 - Formation of a new unified union school district
 - Enlargement/joining of an existing district
 - Alternative collaborative governance structures
 - Review applicable provisions of:
 - Act 73
 - H.955 and related legislative proposals
 - 16 V.S.A. Chapter 11 and related statutes
 - Identify legal, governance, and operational implications of merger options
 - Outline transition requirements, timelines, and implementation considerations
 - Review the current Articles of Agreement and identify potential amendments or models for a merged district
 - The consultant may also identify considerations related to future regional governance partnerships or expansion opportunities should additional districts express interest at a later date.
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2. Educational Opportunities and Student Impact Analysis

The consultant should evaluate how potential governance structures may impact student learning opportunities, educational outcomes, access to services, and overall student experience across participating districts. The study should also consider how staffing sustainability, recruitment, retention, and access to specialized personnel may impact student programming, services, and educational opportunities over time.

- Analyze current educational programming and opportunities for students in both districts
 - Review opportunities for:
 - Middle school programming alignment and expansion
 - Expanded academic offerings
 - Career and technical education access
 - Intervention and mental health supports
 - Extracurricular and co-curricular opportunities
 - Specialized programming
 - Alternative education pathways
 - Evaluate equity of access and student experiences across districts
 - Assess projected enrollment trends and long-term sustainability
 - Identify potential opportunities and challenges associated with shared or consolidated programming
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3. Financial and Operational Analysis

- Conduct a comparative review of:
 - Current district budgets
 - Spending per pupil
 - Staffing structures
 - Workforce sustainability and long-term staffing capacity
 - Educator recruitment and retention challenges
 - Specialized staffing shortages and service delivery capacity
 - Opportunities for shared staffing models or regionalized services
 - Transportation systems
 - Administrative costs
 - Student support services
 - Facilities operations
 - Debt obligations
 - Capital reserve funds
 - Existing contracts and obligations
- Identify potential operational efficiencies and cost savings
- Model projected financial impacts under multiple governance scenarios

- Evaluate long-term fiscal sustainability of merger options
- Analyze potential economies of scale and areas of duplication
- Review potential impacts of current and future education funding legislation, including yield bills and statewide education finance reforms
- Analyze potential financial implications of future governance restructuring under evolving state legislation
- Review potential opportunities and risks associated with future expansion or inclusion of additional districts or governance partners
- Evaluate potential opportunities for regional collaboration and shared services independent of full governance merger, including but not limited to:
 - Shared staffing and service models
 - Regionalized special education programming and supports
 - Transportation coordination and efficiencies
 - Business office and operational collaboration
 - Technology systems integration and shared infrastructure
 - Cooperative purchasing or shared contractual services

The consultant should identify whether actionable operational efficiencies or collaborative opportunities may exist even in scenarios where full district merger or governance restructuring is not recommended (Act 73/CESA).

4. Tax Impact Analysis

- Conduct tax modeling for participating communities under potential merger scenarios
 - Analyze:
 - Homestead tax implications
 - Non-homestead tax implications
 - Equalized pupil impacts
 - Long-term weighted ADM implications
 - Potential state incentives or penalties
 - Include modeling based on:
 - Current law
 - Proposed legislative changes under H.955 and related proposals
 - Provide scenario comparisons illustrating estimated short-term and long-term tax impacts for taxpayers
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5. Facilities and Capital Planning Review

- Review current facilities utilization and enrollment capacity

- Analyze capital needs and deferred maintenance
 - Evaluate opportunities for operational efficiencies related to facilities
 - Review transportation and geographic considerations, including:
 - Student ride times
 - Routing efficiencies
 - Geographic and regional access barriers
 - Transportation cost projections under potential governance scenarios
 - Potential impacts on student participation, access to programming, and extracurricular involvement
 - Identify long-term facility planning implications under merger scenarios
 - Review existing Capital Improvement Plans and long-term deferred maintenance obligations for participating districts
 - Assess infrastructure conditions, building systems, site needs, and long-term facility sustainability
 - Evaluate potential infrastructure investments or liabilities associated with merger scenarios
 - Identify opportunities for shared facilities planning, operational efficiencies, and coordinated capital investments
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6. Community Engagement and Stakeholder Input

The consultant shall maintain regular communication with participating districts throughout the study process. Communication expectations may include:

- Periodic updates to participating school boards
- Public presentations at key project milestones
- Opportunities for district leadership and boards to review draft materials and provide feedback
- Development of public-facing summaries and presentation materials written in clear, understandable language for community members
- Ongoing coordination regarding timelines, engagement activities, and emerging findings

The districts value transparency and community engagement throughout the study process and expect communication materials to be accessible to a broad public audience.

7. Final Deliverables

The consultant shall provide periodic updates to participating boards throughout the study process, including presentations at key milestones and public-facing summary materials written

in clear and understandable language. Opportunities for review and feedback on draft materials should also be incorporated into the process.

- A written comprehensive study report
- Executive summary for public distribution
- Financial and tax modeling summaries
- Governance and transition recommendations
- Presentation materials for school boards and community forums
- Proposed timelines and next-step considerations, if a merger is recommended for further exploration

The final report should clearly identify:

- Opportunities
 - Risks
 - Financial implications
 - Governance implications
 - Student impacts
 - Operational considerations
 - Areas requiring additional study or legal review
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Timeline

The districts anticipate completion of the study during the 2026-2027 school year, with preliminary findings presented throughout the process to participating boards and communities.

The consultant proposal should include:

- Proposed timeline
 - Estimated hours
 - Deliverables schedule
 - Estimated costs
 - Proposed meeting schedule
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Proposal Expectations

Interested consultants should provide:

- Background and experience related to Vermont school governance and merger studies
 - Knowledge of Vermont education finance and governance law
 - Experience with community engagement and facilitation
 - Proposed methodology
 - Estimated timeline and cost proposal
 - References from similar projects
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Study Intent

This study is intended to provide transparent, objective, and data-driven analysis to support informed local decision-making. The districts seek to proactively understand the educational, governance, and financial implications of merger options prior to potential future statewide governance changes and to ensure local analysis and community input remain part of the decision-making process.

The study should also recognize that statewide governance and finance proposals continue to evolve. As a result, the consultant should identify considerations related to future regional expansion opportunities, potential inclusion of additional districts, and changing legislative or financial conditions that may impact long-term governance planning.